**Overview:**

The program is an independent (at home) study program that will be of particular interest to treasurers, assistant treasurers, finance committee members, and audit committee members

**Objective:**

To develop/test treasury knowledge to benefit students and congregations.

**Enrollment Application:**

The enrollment application is due to the diocesan treasurer as soon as possible.

**Technology**

All aspects of communication and course work are conducted electronically. Therefore, students must have sufficient skill and electronic capability including e-mail, the internet, Acrobat, MS Word and Excel.

**Presentation -** The program is presented as follows:

**Open Book Exam (1 unit)**

A completed open book exam is due by October 31st.

**Process improvement implementation report (1 unit)**

A completed report is due by October 31st.

**Certificate and Award**

Students successfully completing both units will be awarded a Certificate in November during or after the Diocesan Convention..

 **Other Program Materials and Information**

Application form – page 2

Report of Process Improvement Implementation form – page 3

Church Business Process Improvement defined – page 4

Process Improvement - processes to consider – page 4

Curriculum Materials – page 4

Estimated completion time – page 4

Program Oversight – page 4

Application

Certified Church Treasurer Program

Applicant Name

Address

Phone number

e-mail

I have been a member of the following Congregation for years

My Process Improvement Proposal (10 words or less) is:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Applicant Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Warden Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Clergy Signature Date

Send your application and make inquiries to:

Episcopal Diocese of Chicago

Keith Kampert

kkampert@episcopalchicago.org

Treasurer

65 East Huron Street

Chicago, IL 60611-2728

312.751.4201 Office

312.787.5872 Fax

Certified Church Treasurer Program

Report of Process Improvement Implementation

The Church Business Process Improvement Proposed (as described in the application)

The Process Improvement implemented (describe below):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student Signature Date

From your view, has the improvement described above, been successful?

Yes\_\_\_\_ No\_\_\_\_

Comments:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Warden Signature Date

From your view, has the improvement described above, been successful?

Yes\_\_\_\_ No\_\_\_\_

Comments:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Clergy Signature Date

**Church Business Process Improvement**

Process improvement is an action taken to identify, analyze and improve processes to reduce cost and improve performance.

**Processes** **to consider for improvement include:**

Auditing

Bequests

Bookkeeping

Budgeting

Cash

Cash Management

Discretionary funds

Electronic Banking

Expenditures

Financial Statements

Financing

Investment management

Parochial Report

Payroll

Pledges

Receipts

Record Retention

Technology

Travel

**Curriculum Materials**

The Manual of Business Methods in Church Affairs; Audit Guide for Churches in the Diocese of Chicago; tax guide for Episcopal Churches; tax guide for Episcopal Ministers; diocesan Budget and Management Guidelines and the diocesan canons.

**Estimated Completion Time (in hours)**

Application 1-2

Open book exam 4-18

Process Improvement 5-18

Total 9 -38

**Program Oversight**

The diocesan treasurer will administer the program as formulated and is authorized to make revisions from time to time.