PT 1731-i: Administration and Finance for Congregations

Working Syllabus
Episcopal Divinity School
January Session 2012
Monday through Friday, 10:00 a.m. to noon
Sherrill 250

Instructor: Rev. Dr. Patrick S. Cheng
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Office Hours: By appointment

Course Description

This course seeks to foster administrative skills as an essential component of effective ministry for clergy and lay leaders. Specific topics will include compensation strategies, personnel issues, decision-making processes, management styles, budgeting, and financial management in the parish.

Specific Learning Goals

1. Identify and learn about the basic skills relating to administration and finance that are faced by clergy and lay leaders in parish, congregation, and/or church organization contexts.
2. Learn what resources, Episcopal and otherwise, are available with respect to church administration and finance issues.
3. Engage in biblical and theological reflection on administration and finance issues as well as the theology of money.
4. Dialogue with, and learn from, various clergy and lay leaders with practical experience in administration and finance issues.
5. This course will honor multicultural worldviews, respect the contributions by multiple voices, and be taught with a commitment to anti-racism.

Course Requirements

This course will be both a lecture and discussion-based class. All students are expected to come prepared to participate actively in class discussions and in daily online postings. Please note that this syllabus is a work-in-progress, and the instructor reserves the right to change the content of the course during the term. Any student who requires reasonable accommodation with respect to the course requirements as a result of disability must notify the instructor and academic dean, and also provide written documentation of such disability. Specific requirements for full course credit include:

25% Attendance and active participation in class;
30% Daily online posts no later than midnight of the day before each class session;
15% Short reflection paper (2-3 pages), due via email to the instructor prior to class on Monday, January 16, 2012; and
30% Final paper (5-6 pages), due via email to the instructor no later than 5:00 p.m. ET on Tuesday, February 14, 2012.

Daily Online Posts

Prior to the first class session, please post a brief introduction in the class forum on the PowerCampus course home page with the following information:

- Name, program, and year;
- Why you are taking this class;
- What specifically you hope to get out of this class; and
- Previous congregational (or other) administration and finance experience, if any.

By midnight of the day before each class session, post one paragraph for each of the following three questions in the class forum on the PowerCampus course home page:

- What in the readings surprised and/or excited you the most and why?
- What in the readings troubled and/or upset you the most and why?
- What in the readings would you like to covered in class for clarification or further discussion and why?

Short Reflection Paper

A short reflection paper (2-3 pages) will be due via email to the instructor prior to class on Monday, January 16, 2012. For the paper, select one topic from the first week of class that most interested you and reflect upon the following:

- The practical significance of the topic for you and your vocational calling;
- The biblical and/or theological significance of the topic for you;
- What you learned about the topic that you did not know before;
- How you plan to engage in further learning (e.g., what resources might you consult) about the topic.

Final Paper

A final paper (5-6 pages) will be due via email to the instructor by 5:00 p.m. ET on Tuesday, February 14, 2012. For the paper, apply the four main themes of (1) planning, (2) organizing, (3) leading, and (4) assessing to a specific parish, congregation, or church organization with which you are associated, either currently or in the past. Be sure to cover the following in your paper:

- Briefly describe the demographics, local context, and history of the parish, congregation, or church organization;
- Describe which of the four main themes – including the topics covered within each of the themes – you consider to be strengths of the entity;
- Describe which themes and topics you consider to be challenges and/or growing edges for the entity;
- Based upon what you learned from the course, describe what specific changes you would implement with respect to the entity if you were the rector, warden, senior pastor or lay leader, or executive director of the entity.

Note for D.Min. and Other Advanced Students

Course work for all Doctor of Ministry (D.Min.) students must demonstrate an advanced understanding of the nature and purposes of ministry, enhanced competencies in pastoral analysis and ministerial skills, and the integration of these dimensions into the theologically reflective practice of ministry. D.Min. students are encouraged to focus their course work on a particular subject germane to their anticipated thesis/project. D.Min. students are expected to do a significant research paper on a topic of to their program goals in addition to other course requirements. Please discuss the topic of your paper with the instructor.

Course Grading Criteria

A level – Submits work on time; proposes creative ideas in class sessions and online posts; demonstrates critical and creative thinking in the papers. No unexcused absences.

B level – Submits work on time; shows enthusiasm in class session and online posts; demonstrates cogent thinking in the papers. No more than one unexcused absence.

C level – Does not submit work on time; shows minimal engagement with the class sessions, online posts, and/or papers; or more than one unexcused absence.

Pass/Fail Option

Student must let the instructor know about this option by the end of the first week of classes (Friday, January 13, 2012). Grading for this option will be as follows:

- Pass: B or better (required of D.Min. students)
- Marginal Pass: B-
- Fail: Lower than B-

Extensions

Students who cannot finish their final papers on time must send a petition for an extension to Cecelia Cull in the Registrar's Office. She can be reached via email at ccull@eds.edu.

Required Texts

The following five required texts may be purchased at the Harvard Coop or online. The texts are also available on reserve at the Sherrill Library.

- Otto F. Crumroy, Stan Kukawka, and Frank M. Witman, *Church Admininstration and Finance Manual: Resources for Leading the Local Church* (New York: Moorehouse Publishing, 1998), ISBN 978-0819217479 (hereinafter "Manual").
- Dan Hotchkiss, *Ministry and Money: A Guide for Clergy and Their Friends* (Herndon, VA: Alban Institute, 2002), ISBN 978-1566992619.
- Bruce P. Powers, ed., *Church Administration Handbook*, 3rd rev. ed. (Nashville, TN: B&H Academic, 2008), ISBN 978-0805444902 (hereinafter "Handbook").
- C.K. Robertson, *Transforming Stewardship* (New York: Church Publishing, 2009) ISBN 978-0898696073.

- Church Law and Tax Report, *Risk Management for Churches: A Self-Directed Audit* ISBN 978-1880562123; available at http://store.churchlawtodaystore.com/rimaforch.html or 800-222-1840.

Other Texts

The following digital resources are available online for download:

- The Episcopal Church, *Manual of Business Methods in Church Affairs* (hereinafter "TEC Manual"), at http://www.ecusa.anglican.org/documents/MANUAL_2009.pdf
- The Diocese of Massachusetts, *Financial Policies, Procedures, and Controls for Our Parish: A Model Manual* (hereinafter "DOM Manual"), at http://www.diomass.org/webfm_send/1697
- The Diocese of Massachusetts, *A Resource Guide for Congregations on Good Business Practices*, at http://www.diomass.org/webfm_send/178/
- The Diocese of Massachusetts, *Compensation Guidelines*, at http://www.diomass.org/webfm_send/1753
- The Church Pension Group, *2011 Tax Guide for Episcopal Ministers*, at http://bit.ly/vd30Du
- The Alban Institute, *Moving from Fund-Raising to Stewardship*, at http://bit.ly/tRo0Oa
- Church Insurance Company, *Risk Management and Insurance Basics*, at http://bit.ly/sVZmtw
- Internal Revenue Service, *Tax Guide for Churches and Religious Organizations*, at http://www.irs.gov/pub/irs-pdf/p1828.pdf

Daily Class Schedule

Classes will meet from 10:00 a.m. to 12:00 noon on Mondays through Fridays during the EDS January 2012 session, which meets on weekdays from January 9 through January 20, 2012.

Class 1 – Monday, January 9

Introduction; What I Wish I Learned in Seminary

Guest Speaker: The Very Rev. Miriam Gelfer, Dean of Students, Episcopal Divinity School

Readings:

- Manual, pp. 1-12
- Handbook, pp. 20-72
- TEC Manual, Introduction to p. i-2
- DOM Manual, Chapters 1-2

Class 2 – Tuesday, January 10

Theology of Money; Planning 1 (Mission, Goals, Growth)

Guest Speaker: The Rev. Hall Kirkham, Assistant Rector, St. Peter's Church, Weston, MA

Readings:
- Hotchkiss, *Ministry and Money*, pp. vii-134
- Manual, pp. 13-41, 97-114

Class 3 – Wednesday, January 11

Planning 2 (Budgets, Gifts and Memorials)

Guest Speaker: The Rev. Pamela L. Werntz, Rector, Emmanuel Church, Boston, MA

Readings:
- Manual, pp. 41-79
- Handbook, pp. 145-66
- TEC Manual, Chapter I
- DOM Manual, Chapters 3-4

Class 4 – Thursday, January 12

Organizing 1 (Employment Law, Legal Issues)

Readings:
- Manual, pp. 115-245, 290-308
- DOM Manual, Chapters 13, 15-16

Class 5 – Friday, January 13

Organizing 2 (Compensation, Taxes, Payroll, Records)

Readings:
- Manual, pp. 94-97, 336-43
- Handbook, pp. 87-133
- TEC Manual, Chapter IX
- DOM Manual, Chapters 15-18
- DOM Compensation Guidelines
- CPG 2011 Tax Guide for Episcopal Ministers

Class 6 – Monday, January 16

Leading 1 (Leadership, Self-Care)

Guest Speaker: The Rev. Dan Weir, Board of Trustees, Episcopal Divinity School

Readings:
- Manual, pp. 247-71
- Handbook, pp. 3-19, 73-84, 261-324

Class 7 – Tuesday, January 17

Leading 2 (Stewardship, Communications, Copyright)

Guest Speaker: Ms. Tanya Cosway, Treasurer, Christ Church Cambridge, Cambridge, MA

Readings:

- Manual, pp. 272-87
- Handbook, pp. 209-17
- DOM Manual, Chapter 12
- Robertson, *Transforming Stewardship*, pp. 1-165
- Alban Institute, *Moving From Fund-Raising to Stewardship*

Class 8 – Wednesday, January 18

Assessing 1 (Internal Controls, Reporting, Audits)

Guest Speaker: Mr. Chris Meyer, Congregational Business Consultant, Episcopal Diocese of Massachusetts

Readings:

- Manual, pp. 289, 309-35
- Handbook, pp. 134-44
- TEC Manual, pp. i-3 to i-7, Chapters II to VI
- DOM Manual, Chapters 5-9, 11

Class 9 – Thursday, January 19

Assessing 2 (Property, Events, Risk Management)

Guest Speaker: The Rev. Elder Diane Fisher, Metropolitan Community Churches

Readings:

- Manual, pp. 75-94, 343-62, 379-499 (skim)
- Handbook, pp. 167-208
- Church Law and Tax Report, *Risk Management for Churches: A Self-Directed Audit*
- TEC Manual, Chapter VII
- DOM Manual, Chapter 10, 14
- Church Insurance Company, *Risk Management and Insurance Basics*

Class 10 – Friday, January 20

Miscellaneous (Parochial Reports, Regulatory Reporting, Tax Exemption); Conclusion

Readings:

- Manual, pp. 94-97, 363-78
- TEC Manual, Introduction p. i-7, Chapters VIII
- Internal Revenue Service, *Tax Guide for Churches and Religious Organizations*

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