



Advancing God's Kingdom by Preparing Competent Christian
Leaders for Spirit-Empowered Life and Ministry

G247 Finance, Governance and Administration

3 credits. Prerequisites: first year of studies.

January 6-10, 2020

Module C

Monday-Friday, 9am-4pm

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*"In his grace, God has given us different gifts for doing certain things well...If
your gift is to lead, do it diligently." – Romans 12:6, 9*

Please note: This course includes papers, activities, and reading before and during the module.

Course Content and Goals

Course Description

Charitable organizations of any size are responsible to develop and maintain effective systems of operations. In this foundational course, students will learn about and practice the basic principles and tools for effective church and non-profit finance, governance, and administration.

Relationship to Horizon's Mission

This course prepares students for competent Christian leadership by teaching them to assess the financial health and operations in a local church, deliver proper preparation and guidance to formal organizational meetings, and manage an effective administrative cycle for a small business office environment. These abilities are essential to pastoral and ministry leadership in a variety of settings.

Core Competencies and Learning Outcomes

To demonstrate competency in *Leadership and Administration*, students will:

1. Identify the principles of fiduciary responsibility and evaluate the flow of financial operations in a ministry setting (risk management, handling offering, deposits, purchasing, payments, etc.). (finance)
 - *Assessment: Quizzes*

2. Practice basic financial management and oversight (budgeting, reading balance sheets, etc.). (finance)
 - *Assessment: Quizzes, Prepare a Departmental Budget, including Budgeting for the Event.*
3. Distinguish structures of authority and submission in local (e.g., constitution, board, pastor, staff, congregation), regional, and national relationships. (governance)
 - *Assessment: Quizzes*
4. Prepare official documentation for organizational meetings (e.g., board and congregational meetings) and practice parliamentary procedure. (governance)
 - *Assessment: Reading Response Essay, Quizzes, Mock Board Meeting, Meeting Agenda Package*
5. Plan for basic management and administrative principles for effective ministry (e.g., staffing, job descriptions, supervising, evaluating, policies, and procedures). (administration)
 - *Assessment: Reading Response Essay, Administrative Systems Plan*

About the Instructors

Pastors Marvin Wojda, Russ Stare and Kevin Abrey serve on the pastoral staff of Elim Church in Saskatoon. Pastor Marvin is the Lead Pastor and is in his 29th year of ministry with Elim Church. Pastor Russ is the Associate Pastor of Operations who leads the team that gives oversight to Elim's administration and operations. Russ brings a wealth of business and financial experience to this position. Pastor Kevin is Pastor of Administration at Elim and gives oversight to the finances and financial reporting for the church. He recently provided leadership to a building committee that oversaw the completion of a building addition.

Course Work

Required Readings

Welch, Robert H., *Church Administration: Creating Efficiency for Effective Ministry*. Nashville: B&H Academic, 2011. (ISBN-13: 978-1433673771)

Robert, Henry M. III., Honemann, Daniel H., Balch, Thomas J., Seabold, Daniel E., Gerber, Shmuel. *Robert's Rules of Order Newly Revised in Brief, 2nd edition*. Philadelphia: Da Capo Press, 2011. (ISBN-13: 978-0306820199)

Additional course readings are available on Populi. You will have to use Microsoft Excel or Google spreadsheets to access the spreadsheet templates in the budgeting section.

**Students are responsible to purchase textbooks from a third-party retailer. For your convenience, Horizon has partnered with Kennedy's Parable to provide textbooks.

Course Assignments and Activities

Portfolio Components. *Administrative Systems Plan.* This assignment must be edited and submitted to the *Leadership and Administration e-project* in your Portfolio on *Portfolium*. See the [Portfolio Guide](#): “What Goes in My Portfolio” for further information.

BEFORE THE MODULE

1. *Reading Response Essay.*

The purpose of these pre-module readings is to familiarize students with key concepts, roles, and terminology inherent to matters involving finance, governance, and administration. It will be important to understand these concepts, roles, and terminology before the module so that classroom time can be spent handling these matters with entry-level proficiency. Please read the following portions of your textbooks and designated articles available on Populi:

- Finance:
 - i. DeKruyter_Overseeing Church Finances (available on Populi)
 - ii. Coley_Accounting 101 (available on Populi)
 - iii. Internal Controls Checklist - Do not memorize these, just skim them over. Also come prepared to discuss the two-person rule and how it applies to the cash receipts process and the disbursements of funds in Welch’s book. (available on Populi).
 - iv. A Guide to Financial Statements for Not-for-Profit Organizations—Questions for Directors to Ask (pp. 1-14) (available on Populi)
- Governance:
 - i. 8 Church Board Responsibilities (available on Populi)
 - ii. *Robert’s Rules of Order* textbook:
 1. Chapters 1-3 for an introduction to governance
 2. Chapter 4 for familiarity with key roles (pp. 135-155)
- Administration
 - i. Welch’s *Church Administration* textbook:
 1. Chapter 1: “An Introduction to Administration” (pp. 1-5); “An Introduction to Administration” (pp. 12-20)
 2. Chapter 2: “Basics of Administration” (pp. 21-47)

Based on your pre-module readings, write 2 pages in response to the following questions:

- 1) *Why do boards exist and why there are rules governing board and organizational function?*
- 2) *Why is administrative work vital for the proper biblical (i.e., use of spiritual gifts; practice of faithful stewardship) and everyday functioning of a local church?*

Be sure to mention key concepts, roles, and terminology in your responses. Please cite the sources used in your responses. Upload your paper to Populi.

- Related learning outcome(s): #4 and #5.
- **Assignment Length:** 2 pages. **Due date:** January 6, 2020 at 9am.

DURING THE MODULE

2. *Readings (from the Textbooks and articles made available on Populi).*

The class will devote portions of time during module week to discussing assigned readings from the textbooks and articles made available on Populi. Each reading is accompanied by guiding questions for discussion. In-class you will read and review the following sections of Welch's *Church Administration* textbook:

- Chapter 3: pp. 52 to 57 (Constitution/By-Laws & Incorporation); pp. 58 to 63 (Policies/Procedures)
- Chapter 4: pp. 66 to 69 (Organizing the Church); pp. 76 to 84 (Church Staff Plan)
- Chapter 5: pp. 105 & 106 (Administering Personnel Resources); pp. 111 to 123 (Employment); pp. 123 to 125 (Work Environment); pp. 128 to 132 (App. Work Environment); pp. 145 to 149 (Performance) Comprehensive description.

3. *Quizzes.*

Students will complete five quizzes throughout the module week (see class schedule) that reinforce comprehension of key concepts, roles, and terminology inherent to that day's subject matter. This knowledge will also prepare you for some of the post-module assignments.

- Related learning outcome(s): #1, 2, 3, and 4.
- **Assignment Length:** N/A. **Due date:** January 6-10, 2020 (see class schedule).

4. *Mock Board Meeting.*

During class on Monday, January 6, students will participate in a simulated board meeting. This will give students the opportunity to practice parliamentary procedure. After the mock board meeting, there will be a discussion and debrief.

- Related learning outcome(s): #4
- **Assignment Length:** N/A. **Due date:** January 6, 2020 during class.

5. *Field Trip.*

The class will leave campus for a portion of Friday, January 10 to visit select local churches and parachurch ministries of various sizes to observe and dialogue with in-service leaders about administrative practices in different contexts. The learning objective is to observe the various implementations of standard practices as well as innovative approaches to administration. In class, we will prepare a list of topics and questions that students will plan to explore during the visits. Students should come prepared to record observations that can be adopted into Assignment #8, the *Administrative Systems Plan*.

AFTER THE MODULE

6. *Meeting Agenda Package.*

Students will design and assemble a formal board meeting package that consists of an agenda, documents relating the agenda (leadership devotional, minutes of previous meeting, financial report, ministry dashboard and other reports relating to agenda items), as well as board training resources. The learning objective is to prepare for effective leadership of formal meetings and provide the required documentation of the proceedings. Samples will be provided in class.

- Related learning outcome(s): #4
- **Assignment Length:** 4-5 pages. **Due date:** January 20, 2020.

7. *Prepare a Departmental Budget, including Budgeting for a Healthy Church.*

Students will be able to evaluate their historical spending against budget and plan their residual year spending accordingly. Using incremental budget methods, students will be able to use the concepts of fixed cost/overhead expenditure, salaries and benefits, programming expenditures and capital items on financial statements. They will be able to relate and discuss the relationship to the budgeting cycle. We will not discuss creating a strategic plan, but will have a new board-directed initiative/ministry to start up.

- Related learning outcome(s): # 2.
- **Assignment Length:** 5 pages. **Due date:** January 30, 2020.

8. *Administrative Systems Plan.*

Students will draw on class material as they outline how to plan, organize, lead, and evaluate the operation of a church's day-to-day needs. The plan will include details of and supporting documentation required to complete the following items:

- Annual audit and budgeting
- Annual performance review and staffing structure
- Administrative and event calendar for the organization
- Facilities and maintenance
- Annual reporting to various constituencies (e.g. districts, Annual General Meetings, etc.)
- Include footnotes with short explanations for how your plan is applying principles you have learned. These footnotes should include explicit citations of your class notes, Welches' *Church Administration* book, and things you learned from the field trip.

Students will have to develop concise policies and procedures to aid them in reaching the outcomes. Content of these policies should include managing and administrating volunteers or personnel, creating a healthy working environment for fellow employees and volunteers (with defined job descriptions and clear performance measures), and determining how to connect performance to compensation.

- Related learning outcome(s): # 5.
- **Assignment Length:** 5 pages. **Due date:** February 7, 2020.

Estimate of Time Investment (individual time investments may vary)

Classroom time	30 hrs	N/A
1. Reading Response Essay	5 hrs	Jan. 6
2. Readings	10 hrs	In class
3. Quizzes	In class	Jan. 6-10
4. Mock Board Meeting	In class	Jan. 6
5. Field Trip	In class	Jan. 10
6. Meeting Agenda Package	5 hrs	Jan. 20
7. Prepare a Departmental Budget	25 hrs	Jan. 30
8. Administrative Systems Plan	25 hrs	Feb. 7
	Total =	98 hrs

Assessment Rubrics

Assessment rubrics will be available by the first day of class on a Populi Lesson called “G247 Assessment Rubrics.”

Course Outline / Class Schedule

Date	Topics	Activities and Quizzes
<i>Prior to Jan. 6</i>		Readings and Response Essay
Monday, Jan. 6 (Governance— Marvin Wojda)	Course Introduction Board Governance, Constitution and Bylaws, Business meetings	-Quiz 1: Governance Key Terms -Board Meeting Preparation -Mock Board Meeting -Congregational Meetings
Tuesday, Jan. 7 (Finance—Kevin Abrey)	Ensuring the continuity and viability of Ministry through the financial management of the church.	-Quiz 2: Key Terms: Financial Terms and Statements -Activity: Micro ministry department budget, including budgeting for large events and projects. -View In-Class Insurance Video excerpts -Macro Budget Process and timeline -Capital Budget -Fund Accounting
Wednesday, Jan 8 (Finance—Kevin Abrey)	Budgeting processes, goal setting and evaluating progress against the financial goals	-Quiz 3: Facing the Risk – Liability Insurance Checklist
Thursday, Jan. 9 (Admin—Russ Stare) Chapel service, 10:45am – 12:15pm	Managing an effective small business office environment	-Quiz 4: Key Terms
Friday, Jan. 10 (Admin—Russ Stare)	Business management and wrap up	-Quiz 5 -Field Trip: Visiting churches and parachurch ministries. -Summary of applications/information learned on Field Trip.
Jan. 10 – Feb. 14	Working on Post-Module assignments	
Feb. 17 -21	Revision Week	Final submissions due Feb. 21

- First submissions of assignments will not be accepted after Friday, February 14.

Date	Revisions Due
Monday, February 17	Resubmissions of <i>Reading Response Essay</i> (as necessary) Resubmissions of <i>Quizzes</i> (as necessary) Resubmissions of <i>Mock Board Meeting</i> (as necessary)
Tuesday, February 18	Resubmissions of <i>Meeting Agenda Package</i> (as necessary) Resubmissions of <i>Prepare a Departmental Budget</i> (as necessary)
Wednesday, February 19	Resubmissions of <i>Administrative Systems Plan</i> (as necessary)
Thursday, February 20	Secondary resubmissions (as necessary)
Friday, February 21	Additional resubmissions (as necessary)

- No resubmission of assignments will be accepted after Friday, February 21.

Academic Policies

General Assignment Guidelines

Please see the Horizon [Format Guide](#) for assignment submission, grammar, and formatting guidelines.

Late Assignments and Extensions

Students are expected to submit work by the assigned due dates, as part of their development of the Leadership and Administration competency. To submit extension requests, students must submit the [Assignment Extension Request Form online](#) and *before the due date*. Professors may grant extensions in the case of extenuating circumstances, such as significant illness or a family emergency. Furthermore, no extensions will be granted beyond the final day of a term or semester.

A late assignment will not be assessed until the student first meets with the professor or the Faculty Assistant to discuss whether the student's reasons for the late submission are acceptable. Unexcused late submissions will be tracked across each student's program. If one assignment is submitted more than five days late or if a student incurs multiple instances of unexcused late submissions, it will result in academic discipline, such as required tutoring, academic probation, failure of the course, or failure to qualify for graduation. Similar to standard human resource employment practices, students will receive warnings and conditions with increasing severity of academic discipline.

Resubmission of Assignments

Students have until the last day of revision week to submit revisions, and students can only submit up to two revisions for each assignment. Students should follow the revision schedule outlined above.

Horizon College Assessment of Student Work

The goal of courses is to help students develop the stated competencies, not earn letter grades. Assignments are the means by which instructors evaluate development of those competencies. Consequently, students do not earn overall “grades” on individual assignments. Instead, assessment focuses on measuring students’ competency as outlined in the syllabus and assignment rubric. For purposes of transferability to other institutions, the final competency designations will be translated to a comparable letter grade on a traditional transcript. The tables below explain Horizon’s approach:

Horizon CBE Scale		Descriptor	Letter Grade	Grade Point	U of S Equivalency
E	Exceeding	Student exceeded competency requirements for some learning outcomes and met requirements for all remaining learning outcomes.	A+	4.0	90-100
			A	4.0	85-89
			A-	3.7	80-84
M	Meeting	Student met competency requirements for all learning outcomes and may have exceeded in one.	B+	3.3	77-79
			B	3.0	73-76
			B-	2.7	70-72

Students pass a course only after they have demonstrated that they have *met or exceeded all* competency requirements for a course. If the student chooses not to meet all course competency requirements, the course will not be sufficient to fulfill their program requirements at Horizon. Nevertheless, for transferability purposes, the student will receive a letter grade of C+ or below on a traditional transcript.

BTM	Beginning to meet	Student was beginning to meet competency requirements for any one or more learning outcomes, and met or exceeded competency requirements for all other outcomes.	C+	2.3	67-69
			C	2.0	63-66
			C-	1.7	60-62
NYM	Not yet meeting	Student was not yet meeting competency requirements for one or more learning outcomes.	D+	1.3	57-59
			D	1.0	53-56
			D-	0.7	50-52
			F	0.0	0-49

Academic Honesty

Horizon uses the University of Saskatchewan definition of plagiarism described as “the presentation of the work or idea of another in such a way as to give others the impression that it is the work or idea of the presenter. Adequate attribution is required. What is essential is that another person have no doubt which words or research results are the student’s and which are drawn from other sources” (Office of the University Secretary, 2012). Students are expected to give due recognition to sources from which all substantial phrases, sentences or even ideas are drawn. Note also that you may not submit work done in one course to satisfy the requirements of another course (unless both instructors agree beforehand to accept such work). See [here](#) for examples of plagiarism and further guidelines in the [Student Handbook](#).

Disability Services Information

If you would benefit from learning accommodations due to pre-existing physical or mental health conditions or learning disabilities, contact the Academic or Student Life departments at the beginning of the course. Horizon will work to meet your learning and/or physical needs where possible. If any conditions arise during the course that you wish to disclose, please contact us as soon as possible. In all cases you will need to provide current [documentation](#) of the disability or condition you wish to disclose. Horizon takes appropriate care to ensure confidentiality about any such disclosures. For more information, contact Bob Williamson, Dean of Students, at bwilliamson@horizon.edu; or Heather Wood, Associate Dean of Students, at hwood@horizon.edu.

Class Attendance

Students should attend all classes in order to facilitate competency development. In the case of illness or other unforeseen circumstances, students may miss one day of a module course or three days of class in a term or semester course without academic penalty. A student must be present for the full duration of a class period in order to be registered as present for the class. Students who are absent for more than the number of classes stated above will automatically fail the course. Students wishing to be exempted from this policy due to extenuating circumstances may make an academic appeal, where they will need to document and verify those circumstances. Students who miss a class are responsible to get missed notes or handouts from another student, rather than from the professor.

Use of Technology

Horizon encourages the use of electronic devices in the classroom to enhance learning. Careful consideration must be given to privacy issues, copyrighted materials, and the general care and concern for others. Please respect the following classroom policies:

- Please use online access for course learning only. This is a matter of respect for the instructor's teaching, your own learning, and fellow students who may be distracted by other uses.
- Students should secure permission from the instructor to record any teaching material. This includes PowerPoint slides, white board illustrations, notes, and any form of audio or video.
- Student feedback is a valuable input for course improvements. Please resolve any classroom grievance about the instructor or course with the instructor personally, through the Horizon College and Seminary grievance procedures, or the Populi-based course evaluations. It is inappropriate to air classroom grievances on a social media platform.
- When instructors use recording mechanisms in the classroom, recorded materials will be used for the sole purpose of instruction and cannot be released to any social media outlet without the written consent of the students whose images have been recorded.
- In general, it is not acceptable to share photographs or videos of students in the classroom setting without permission from those whose images appear in such media.