Clergy Financial Wellness Initiative

Saving Grace - Course Curriculum – Personal Finance

MODULE	TOPIC	BOOK LIST TEXT	OUTCOMES	WHEN*
1	**All Manner of Good**	Saving Grace: A Guide to Financial Well-Being Clergy Workbook	Think about their own tendencies toward money and possessions as idols; Learn what the faithful way has to say about money; and realized the benefits of a Spending Plan and how it can help them faithfully achieve their financial goals.	**March 16:** 1:00-2:30 PM
2	**Getting Started: Tracking Expenses and Income**	Saving Grace: A Guide to Financial Well-Being Clergy Workbook	Set goals they want to achieve this year; Learn how to track their daily expenses; and Complete the Income section of their Spending Plans.	**March 23:** 1:00-2:30 PM
3	**Giving and Saving**	Saving Grace: A Guide to Financial Well-Being Clergy Workbook	Understand what the consumer culture says about giving and saving; Learn about the faithful way toward giving and saving; and Complete the Giving and Saving sections of their Spending Plans.	**April 6:** 1:00-2:30 PM
4	**Understanding and Eliminating Debt**	Saving Grace: A Guide to Financial Well-Being Clergy Workbook	Understand the pull of the consumer culture in regard to debt; Explore the faithful way toward dealing with debt; Learn how to handle the current debt they have and avoid incurring new debt; and Complete the Debt section of their Spending Plans.	**April 13:** 1:00-2:30 PM
5	**Spending**	Saving Grace: A Guide to Financial Well-Being Clergy Workbook	Consider what it means to spend mindfully and to be a prudent spender; Learn more about the faithful way as it relates to spending; and Complete the remaining sections of their Spending Plans.	**April 20:** 1:00-2:30 PM
6	**Adjusting the Spending Plan**	Saving Grace: A Guide to Financial Well-Being Clergy Workbook	Bring their income and expenses into balance; Learn biblical principles for prioritizing using money; Move forward with their record-keeping system; and Find solutions for dealing with implementation issues in their Spending Plan.	**April 27:** 1:00-2:30 PM

**The dates and times are subject to change based on the group's availability.*

***Generous Church Leadership* - Course Curriculum** – Church Finances

MODULE	TOPIC	BOOK LIST TEXT	OUTCOMES	WHEN*
1	**Theology of Money**	Spirituality of Fundraising (Henri Nouwen) Ministry & Money (Janet & Phil Jamieson)	Participants will explore the roots of their own money values, examine the influence of money and possessions in their own lives, and develop their own theology of giving that they can live out in congregations with authenticity.	**May 11:** 1:00-2:30 PM **May 25:** 1:00-2:30 PM
2	**Pastor as Generosity Leader**	Ministry & Money (Janet & Phil Jamieson)	Participants will grow in their understanding of their leadership role in local church finances and growing generous disciples.	**June 8:** 1:00-2:30 PM **June 22:** 1:00-2:30 PM
3	**A Disciple's Relationship to Money**	Ask, Thank, Tell (Charles Lane)	Participants will be able to connect and articulate generosity as a key component of a growing, authentic disciple of Jesus Christ.	**July 13:** 1:00-2:30 PM **July 27:** 1:00-2:30 PM
4	**Nurturing Generous Leaders**	Propel: Good Stewardship, Greater Generosity (Clayton Smith)	Participants will have new insights and develop the skills to have generosity conversations with strong givers and be equipped to help move others to move up in their giving.	**August 10:** 1:00-2:30 PM **August 24:** 1:00-2:30 PM
5	**Generosity the United Methodist Way**	Therefore Go: A United Methodist Handbook (Downloadable PDF from UM Communications)	Participants will be better prepared to gather and identify the stories of impact that reinforce the value of our connectional way of working together and giving together.	**September 14:** 1:00-2:30 PM **September 28:** 1:00-2:30 PM
6	**Moving to a Congregational Culture of Generosity**	The Gratitude Path (Kent Millard) The Generous Church (Tom Berlin)	Participants will be encouraged to develop a vision and action plan to lead their congregations to a culture where giving is always framed in the and expression of gratitude and the joy of generosity.	**October 12:** 1:00-2:30 PM **October 26:** 1:00-2:30 PM

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Learning Model:
The UMC Clergy Financial Wellness curriculum and program will be delivered through an online platform, Zoom. Video presentations, discussions, and engagement of the cohort will occur online per the schedule. Reading of program texts will be done as individuals in preparation for the Zoom sessions. Online access and ability to engage is a requirement for participation.

If you have questions or seek additional information about the **Clergy Financial Wellness Program,** please contact Dr. Sarah Diamond, KAUMF Director of Legacy Giving – sdiamond@kaumf.org.