

WHO WE ARE

The Congregational Business Consultants understand. Churches big and small struggle with business issues - how to get things done. We've been there. Now, we want to be there for your congregation.

The Consultants are a group of experienced, committed business people, with years of expertise in church operations, who volunteer to serve other congregations. Our members have served as treasurers, wardens, auditors, and vestry people. Our professions span from accounting, law, financial services, architecture, and ordained ministry.

The Consultants are commissioned to bring those skills to the congregations of this Diocese. Bishop Cederholm called the Consultants in October, 2004, under the leadership of Jack Doran. Since then, the group has grown and evolved, strengthened by contact with more than 100 churches, from the North Shore to the Cape & Islands. We now are led by Chris Meyer, a founding member of the Consultants.

We are here to help you implement sound business practices at your congregation.

Recruiting.

The Consultants are always looking for new members. Ideal candidates have sound business background, experience in church business affairs, a collegial work style, and a desire to promote the mission of the church through sound business practices.

WHAT WE DO

Promote specific sound business practices, such as by helping congregations to...



Establish an annual budget, with

- realistic projections of income
- operating and capital expenses



Prepare financial statements showing income and expenses, and comparing them to the budget, for regular review by the vestry.



Conduct and submit your annual audit to the Diocese on a timely basis (see Calendar) and in accordance with Diocesan audit guidelines.



Submit the annual parochial report to the Diocese on a timely basis (See Calendar), providing important information needed by the Diocese.



Pay periodic obligations timely, including the Diocesan assessment, computed from information in the Parochial Report.



Develop a long-range financial plan. The plan should take into account:

- expected changes in congregational needs
- future plant-related maintenance
- replacement needs
- other capital expenses



Establish both annual and capital stewardship programs.

HOW WE WORK

The Consultants are organized for deployment on your issues. Coordinator Chris Meyer fields inquiries from Congregations. He then deploys consultants, as needed, based on Deanery assignments or skill sets needed for the task. Then, when a particular specialized expertise is required, one consultant can call on another.

The Consultants meet as a group each month. To implement our goals, we:

- report on the progress of team assignments
- evaluate progress within congregations
- review and discuss existing business methods and practices
- develop tools and resources to assist congregations

We have staff support from the Diocese, through our Coordinator. We can call upon other areas of Diocesan expertise, such as the Congregational Coaches, the Treasurer's Office, Congregational Support, and finally the Office of the Bishop.

Our Consultants also work on Diocesan initiatives to benefit congregations. We have published guides and have prepared policies and financial forms.

Learning Opportunities.

Most importantly, we run several training programs each year. The Consultants conduct three Business Practices Workshops at different churches in the early spring. We also have taught seminars at Diocesan Resource Day and at new clergy gatherings.

Calendar

<u>Month</u>	<u>To Do</u>
	Check with Diocese, IRS, Massachusetts, etc. for changes in dates
January	Approve Budget Start payment of assessment Make State and Federal payments
February	Register for Business Practices and Audit workshops
March	Plan for audit report
April	Make State and Federal payments
May	Submit Parochial Report
June	
July	Make State and Federal Payments
August	Submit Parish Audit to Treasurer's Office (due 9/01)
September	Register for Diocesan Resource Day
October	Make State and Federal payments Start work on Annual Budget
November	Attend Diocesan Convention
December	Pass Vestry Resolution on Housing Allowance

Publications of the Congregational Business Consultants

- A Resource Guide for Congregations on Good Business Practices
- Guide to Utilization of Church Property
- Financial Policies, Procedures and Controls for our Parish

EPISCOPAL DIOCESE OF MASSACHUSETTS



**Inviting
Forming
Sending
Serving**

CONGREGATIONAL BUSINESS CONSULTANTS

**Serving Member Congregations
With
Volunteer Business Consulting**

The Consultants are ready to help your congregation. Contact Chris Meyer at cmeyer@diomass.org or 617.527.2739. Chris can evaluate your need and assign a consultant to work with you.