

Workshop for PW Treasurers

What Is This?

A basic outline that can be adapted for a workshop for Presbyterian Women treasurers in the congregation, presbytery or synod. Use it at a PW presbytery or synod gathering, at a cluster training day for PW in the congregations or for an event with neighboring presbyteries.

Who Is the Workshop for?

Presbyterian Women treasurers in the congregations, presbyteries and synods.

What Will Participants Learn?

Participants will

- learn the differences between the responsibilities at each level
- understand why an accurate set of minutes is important
- learn about the PW resources available for treasurers
- contrast the two options for PW presbytery leaders to work with PW congregations

Checklist for Workshop Leaders

Several days or weeks before the scheduled workshop

- Prepare a written plan or outline, with built-in alternatives.
- Plan activities that have a change of pace.
- Secure resources needed.
- Preview any video or audio materials to be presented.
- Plan a community building activity.
- Prepare necessary handouts.
- Prepare nametags, if needed.

The day of the workshop, prepare the location of the workshop including the following:

- Post signs outside the door.
- Ensure the room has an adequate number of tables and chairs.
- Ensure comfortable temperature and proper lighting.
- Have resources and equipment ready.
- See that equipment functions properly.
- Have visual aids prepared.

Conduct the workshop

- Set a welcoming atmosphere.
- Greet the participants in a friendly manner as they enter.
- Provide nametags, if needed.
- Introduce your self, co-leaders and purpose of the workshop.
- Open with prayer.
- Provide a means by which each person can be introduced to the group.

- Direct the learning activities.
- Share your expectations for the workshop.
- Invite the participants to share their expectations.
- Show enthusiasm for the learning experience ahead.
- Offer an opportunity to share.
- Be flexible to the needs of the group.
- Provide handouts.
- Bring the workshop to a close.
- Summarize the points covered.
- Provide an opportunity for evaluation both by the participants and leader.
- Close with prayer.

The Workshop

Open the session with the suggested prayer or one of your own.

Holy God, all that we have is yours. It is only loaned to us to serve your purpose. Guide us as we come together that we may learn to be better stewards as we serve you. This we ask in the name of Jesus Christ.

Why do Presbyterian Women groups need a treasurer?

To introduce the participants to each other and begin exploring what it means to be a PW treasurer invite each participant to tell how her PW could spend \$1,000 if they were granted the money for a special project and why. Or choose another exercise of your own.

Thank participants for sharing. Ask the participants to reflect on the dreams they heard shared. Ask, “What does it mean to be responsible for a group’s treasury?” Record the responses on newsprint.

Distribute **Handout T-1** with the quotations about treasurers. Divide participants into groups of five or six. Instruct the groups to discuss the two quotations using the questions to guide their discussion. Allow no more than ten minutes for this exercise. Call the group back together. Ask someone from each small group to report the insights of her group. Identify commonalities and differences.

What are the responsibilities of PW treasurers in the congregations, presbyteries, synod and churchwide?

Look more closely at the treasurer’s responsibilities. Suggested job descriptions for treasurers in the congregation, presbytery and synod are in the *PW Manual*. Point out that at the churchwide level the PW business associate functions as the treasurer. The churchwide elected position is financial secretary. Ask participants to find the job descriptions for each level.

Distribute **Handouts T-2** and **T-3**. Every treasurer carries similar basic responsibilities. Ask participants to review the chart of responsibilities. Choose from the following questions to help guide the discussion.

- What general responsibilities are common to each level? Among them are
 - chairs finance committee
 - keeps accurate financial records
 - submits regular reports and annual reports
 - submits records for audit
 - attends and/or provides ongoing training and resources
- What responsibility does the treasurer at level have for Celebration Giving?
- Brainstorm ideas for treasurers in congregations to encourage mission pledges.
 - Giving at circle meetings each month.
 - Place labeled baskets or boxes on a table so members can put money in the containers as they arrive.
 - At the first of the PW program year, provide information on how pledge money is spent.
 - Invite members to place written pledges in a basket at the first meeting of the year; offer a prayer of dedication and commitment.
- Why is training important?
- What responsibility does the PW treasurer have to the denominational governing body at each level? An annual financial report should be made to the PW coordinating team and to denominational governing body.
- Who decides how PW money is spent?

How can the PW treasurer in the presbytery work with treasurers in the congregations?

Distribute **Handout T-4**. Review the differences in the two options. Ask for ideas about how the position might work in each. Ask for specific examples for staying in touch with congregations.

What resources are available to PW treasurers?

If possible, have samples from the resource list on hand for the participants to browse. Distribute the resource list. What additional resources are the participants familiar with?

How can the workshop be used to support PW treasurers?

After comparing the position responsibilities, allow time for participants to reflect on what they would add to workshop if they were leading it. Ask what they would add to the workshop if they were the workshop leaders. Record the ideas on newsprint. Ask participants which idea they might try.

Ask what additional information might help treasurers in the presbyteries and congregations understand their responsibilities?

Close with the suggested prayer or one of your own

Redeemer God, we give you all the praise and all the glory for the good that has happened during this time together. We ask your forgiveness for

any human frailties that have sneaked in to make our conversation or our actions a distraction. As we close, we do so with thanksgiving for this community of believers serving as your leaders and for You, our living, dynamic communicating God. It is in the precious name of your son, Jesus, we pray.

Small Group Discussion

- “The purpose for electing a treasurer is to have someone to receive, record, and disburse the funds of Presbyterian Women.” —*PW Manual*
- “This position requires the leader to have a vision, commitment, and knowledge of the way gifts are used.”—*PW Leadership Packet*, treasurer’s brochure

Questions for discussion

1. What do the quotations tell us about the role of the treasurer?
2. What do they tell us about the abilities needed?
3. What would you add to the skills and abilities a treasurer needs?

What Are The Responsibilities of Presbyterian Women Treasurers in the Congregations, Presbyteries, Synod and Churchwide?

Congregation	Presbytery	Synod	Churchwide Financial Secretary
Interprets Celebration Giving	Assists PWP coordinating team in interpreting Celebration Giving	Assists PWS coordinating team in interpreting Celebration Giving	Assists Churchwide Coordinating team in interpreting Celebration Giving
Devise ways to encourage and receive Mission Pledges	Assists PWP moderator to distribute and receive Mission Pledge forms		
Serves as chair of the Finance Committee of PW in the Congregation (PWC)	Serves as chair of the Finance Committee of PW in the Presbytery (PWP)	Serves as chair of the Finance Committee of PW in the Synod (PWS)	Serves as moderator of the Finance Committee of the CCT
Receives and disburses PW funds as directed, including all Celebration Giving funds to PWP treasurer	Receives and disburses PW funds as directed, including Celebration Giving to PWP, PWS and PW Churchwide	Receives and disburses funds as directed, including Global Exchange contributions	<i>Mission Support Services provides accounting services to PW Churchwide</i>
Keeps accurate financial records of receipts and disbursements of all PW funds	Keeps accurate financial records of receipts and disbursements of all PW funds	Keeps accurate financial records of the receipt and disbursement of all PW funds	With the PW treasurer, monitors monthly financial statements for recording of receipts and disbursements
Submits regular written reports to the coordinating team	Submits regular written reports to the coordinating team	Submits regular written reports to the coordinating team	Submits the financial report at each meeting of the CCT
Submits an annual report to PWC and to the session	Submits an annual report to PWP and presbytery	Submits an annual report to PWS and the synod	Submits a financial report to Churchwide Business Meetings
Submits financial records for audit on regular basis	Submits financial records for audit on an annual basis	Submits financial records for audit on an annual basis	Reports the results of the triennial audit to the CCT
			Serves as liaison between the treasurer and the CCT
Attends training for PW treasurers when offered by PWP	Provides training for PW treasurers in the congregations	Provides training for PW treasurers in the presbyteries	Provides support for PW treasurers in the synods
Obtains the resources available for carrying out the duties of the treasurer	Gives complete financial records to next treasurer with adequate explanations		

Tips for Treasurers

- Be sure to keep the *PW Manual* with a guide for treasurers on hand for quick reference. Understand the giving patterns of Presbyterian Women and Celebration Giving.
- Easy-to-use, inexpensive computer software is available to help keep accurate records and create clear reports. Visit your local computer store for help.
- Keep a full and detailed description of cash received and disbursed, records of contributors and cash received (pledges, projects, special offerings, gifts such as memorials, life memberships, etc) and details of where and how payments were made, to whom and for what, as well as all receipts and cancelled checks and submit for the annual audit.
- Keep a current directory of PW treasurers in the congregations, PW synod treasurer and Presbyterian Women Remittance Processing. Know when to send what moneys and where.

The PW Money Timeline

PWC Treasurer	PWP Treasurer	PWS Treasurer
Send first-quarter mission pledge to PWP treasurer by March 10 th	Receive mission pledges and distribute as directed	During each triennium, receive Global Exchange contributions and forward to PW Remittance Processing according to the schedule received
Dedicate the Fellowship of the Least Coin and forward the offering in Spring	Forward at least quarterly to PW Remittance Processing	
Receive and dedicate the Birthday Offering and send it to the PWP treasurer in May	Forward to PW Remittance Processing	
Send second-quarter mission pledge to PWP treasurer by June 10	Receive mission pledges and distribute as directed	
Send third-quarter mission pledge to PWP treasurer by Sept. 10	Receive mission pledges and distribute as directed	
Receive and dedicate the Thank Offering in November and send it to the PWP treasurer	Forward to PW Remittance Processing	
Send mission pledge form to the PWP moderator by December 1	Assist PWP moderator to compile and forward report to PW office in Louisville	
Send fourth-quarter mission pledge to PWP treasurer by December	Receive mission pledges and distribute as directed	

PWP and PWS treasurers submit money at least quarterly to PW Churchwide.

Send checks to:

Presbyterian Women Remittance Processing
PO Box 643652
Pittsburgh, PA 15264-3674

How Does the PW Treasurer in the Presbytery Work with the Congregations?

When PWP Treasurer Is Primary Contact	When PWP Cluster Leader is Primary Contact
The treasurer is a member of the PWP coordinating team and works with the other members to plan and carry out the work of PW in the Presbytery.	The treasurer is a member of the PWP coordinating team and works with the other members to plan and carry out the work of PW in the Presbytery.
The treasurer provides training and resources for the historians in the congregations.	The cluster leaders help the treasurer provide training and resources for the treasurers in the congregations.
The treasurer has direct contact with the historians in the congregations to send and receive information.	The treasurer sends and receives information to sends to the treasurer in the congregations through the cluster leaders.

Suggested Resources

- *PW Manual*, includes a guide for treasurers; item PWR-07-101*
- The Bible, NRSV translation
- *Horizons*, the magazine and Bible study for Presbyterian Women; subscribe online, www.pcusa.org/horizons, or call 800/524-2612; subscription includes six issues of the magazine and the annual Bible study
- *Presbyterian Planning Calendar*; published annually*
- Quarterly churchwide giving reports, online giving and other up-to-date information; available on the PW Web pages, www.pcusa.org/pw/giving.
- Birthday and Thank Offering interpretive material is mailed to presbytery mission contacts, cluster leaders and resource centers. Some items are available as free downloads on the PW Web pages, www.pcusa.org/pw; materials for each offering are published annually*
- PW Budget Brochure; published triennially*
- General Assembly Annual Report; published biannually*

*Order through Presbyterian Distribution Service, 800/524-2612 or www.pcusa.org/marketplace.