

## **Financial Management Training for Priests**

### **Partnership to Support Priests with Learning Basic Financial Management**

To support effective pastoral stewardship of today's parish communities, Catholic Extension is once again offering to dioceses the "Money Tools for Presbyters" workshop.<sup>1</sup> The purpose is to empower pastors to confidently and competently act as the chief stewards of their parish's resources.

This two-day workshop will be offered on site by Leslie T. Maiman, Jr., D.Min., the Chief Operating Officer/Chancellor of the Archdiocese of Anchorage, and Jennifer Cantrell, CPA, Chair of the Archdiocese of Santa Fe Finance Council. Dr. Maiman has over twenty-five years of ecclesial service in two dioceses in addition to having served as Executive Director of the DFMC (Diocesan Fiscal Managers Conference). Ms. Cantrell is a Certified Public Accountant in private practice in Albuquerque, NM, does consulting in dioceses on best practices, parish management, policies and procedures, and has extensive experience in annually preparing hundreds of income tax returns for priests across the United States.

The topics of the two day workshop will include: *A Senior Pastor's Perspective: \$Administration and Priestly Ministry; Introduction to Bookkeeping 101; Reading Financial Statements 101; a Senior Pastors Panel; Budget Supervision 101; Checks & Balances Supervision 101; and Clergy Taxes & Savings 101.*

### **The value of this partnership for the participating diocese is approximately \$17,000**

#### **Each participating organization commits to the following:**

##### **Les Maiman & Jennifer Cantrell:**

*Financial:* Les Maiman and Jennifer Cantrell will donate their professional time and will travel and present at the mission diocese.

*Programmatic:* Les Maiman and Jennifer Cantrell will deliver the "Money Tools for Presbyters" workshop in the diocese, over a two-day period. Les and Jennifer will work closely with the local Diocesan Fiscal Officer to assist the diocese in becoming independent enough to deliver these workshops in the future without the outside consultants.

Approximately six months prior to the workshop, Les Maiman will visit on site with the Fiscal Officer and Vicar General, and meet the bishop if he is available. The objectives of this key initial planning visit are to walk through the contents of the workshop, to talk through the sessions, and to identify any local presenter resources.

##### **Catholic Extension:**

*Financial:* Catholic Extension will contribute 100% of the travel costs for Les Maiman and Jennifer Cantrell to the mission diocese, including airfare and local accommodations, through reimbursement. Catholic Extension will also contribute 50% of the cost of travel and accommodations for priests, up to \$2,000.

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<sup>1</sup> Maiman, Leslie T., "Pastoral Finance Workshop: Money Tools For Presbyters" (D.Min. diss., Catholic University of America, © 2012).

*Programmatic:* Catholic Extension will promote this opportunity to all of the mission dioceses.

**Host Diocese:**

*Financial:* The mission diocese will contribute at least 50% of the cost of hosting the training program in their diocese, i.e. the classroom space for training, meals, and travel for priest participants.

*Programmatic:* The host diocese will have the support of the bishop, through his encouragement of priests to participate and his presence at the training, at least part of the time. At least 50% of the priests in the diocese need to commit to participate. The local DFO and any other diocesan fiscal managers will participate with Les and Jennifer in presentations, to seed and facilitate future local continuity of this initiative after the training workshop is complete.

<b>Organization</b>	<b>Contribution Estimate</b>
<b>Les Maiman &amp; Jennifer Cantrell</b> Pro-Bono time	<b>Valued at \$9,000</b>
<b>Catholic Extension</b> 100% of travel and accommodations for both presenters 50% of travel and accommodations for priest participants, up to \$2,000	<b>Est. at \$6,000</b>
<b>Diocese</b> At least 50% of accommodations and travel for priest participants  Provide facilities for training	<b>Est. at \$2,000</b> (but varies based on dioceses' costs for facilities and priest travel)
<b>VALUE TO DIOCESE</b>	<b>\$17,000</b>