POSITION TRAINING

PWOC LDP

Leadership Development Program

Financial Liaison

Welcome Leader,

Working on a PWOC Board can be such a delight!

This training is designed to set the correct trajectory for your position to set you up for success. Take the time to think through each element. Consider how the information applies to you and to your military installation. Ask questions! Track down answers. Be proactive.

As you are making plans for the year, be sure to include self-care. Put God and your health first—take care of yourself and your family! Your service in PWOC should be a blessing to your other areas of responsibility—if it is not, step back and make adjustments. Course corrections will be needed throughout the year.

May God bless you and direct your steps,

Your PWOC Sisters in Christ

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Summer Homework

READ **the PWOC Ministry Manual:** This will give you a great overview of the ministry of PWOC along with helpful tools and information.

CHECK OUT **theHubPWOC.net** for great resources and specifics for your position.

ASSEMBLE **a support team:** Ask 1-2 women to cover you in prayer throughout the year. It is helpful to ask non-local women so they can be objective in giving advice as needed.

COMPLETE **task items such as:** 1) Registering in a volunteer hours system, 2) Completing a Background Check for working with children, or 3) Taking a Food Handler's Course.

WATCH **the Personality Module** in this Leadership Development Program, unless your Board plans to do this training together.

A note about your Board Position Notebook:

In an ideal PWOC world, you were handed a super helpful position notebook (sometimes called a “continuity binder”) filled with everything you need to know, specific to your Board position, at your local installation. If you are one of the lucky ones, make your notebook even better by including all you learn this year. Add your own notes and resources to those of your predecessor.

If you do not have a position notebook, begin creating what you wish you would have received. Collect contact information for your key people. Record local protocol. Create event AARs. Write great Board Reports. Give the advice you wish you would have had. At the end of your term, you will have a valuable resource to hand over to your successor.

Position notebooks can be hardcopy, digital, or a hybrid. For more information and a list of items to consider including, see the section: **Keeping a Position Notebook** in Chapter 1 of the PWOC Ministry Manual.

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Financial Liaison

The Financial Liaison coordinates financial transactions for PWOC in accordance with local regulations under the guidance of the Chapel Resource Funds Manager. Fund procedures at each military installation and within each branch of service vary greatly, so it is important to take the time to learn the local policies and protocol for operating within your PWOC. Build relationships with those who manage funds at your installation. Your job is critical. Know that you will be used by the Lord in a mighty way in your PWOC and your community!

The following slides will help you "unpack" your position. The first line item on each slide comes directly from your position description in the PWOC Ministry Manual, followed by suggestions, questions, and comments to help you see how each element may play out at your installation. Text that appears in gold refers to resources in the PWOC Ministry Manual (PWOC MM) or the PWOC Leadership Development Program (PWOC LDP).

Financial Liaison

1. **Works with the President, the PWOC Chaplain Sponsor, and the Resource Manager to understand the Installation's funding policies and to learn the funds request process.**

   - Schedule a meeting with the Resource/Funds Manager for your Chapel Community. Consider inviting the President to come along so that you both comprehend the financial system and process.

   - Make sure you have the latest information on the Purchase Order Request (POR) process, including the most up-to-date form. Understand timeline expectations on PORs so you can relay this information to the Board to plan ahead.
   - Touch base with your PWOC Chaplain Sponsor early in the PWOC year to clarify financial expectations.

Financial Liaison

2. Attends key financial meetings as necessary to secure funding for PWOC. Keeps the President and the PWOC Chaplain Sponsor informed about the content and outcome of meetings.

- Find out which meetings you should attend; your PWOC Chaplain Sponsor can make recommendations.
- If there is a big event coming up, such as a PWOC Retreat, you may need to "make a case" for extra funding. Being physically present at a financial meeting can be the difference between approval or denial of funding.
- Relay relevant information from meetings to your President and PWOC Chaplain Sponsor.

Financial Liaison

3. Works with the President to compile a proposed budget for the year. Submits the proposed budget to the PWOC Chaplain Sponsor for approval.

- Begin by reviewing proposed budgets from previous years of PWOC to get an idea of what funding has looked like in the past. Keep in mind that budgets can change drastically from year to year.

- Work with the President to come up with a proposed budget. Utilize the ***Budget Breakout by Board Position*** from the PWOC Ministry Manual Appendix to help you think through areas that may need funding.

- Your proposed budget will not operate like a bank account, even if the funding is approved. It becomes part of the larger Chapel Community "projected budget" which is dependent on the same amount of money coming in through offerings and government funding as what came in the previous year.

- Note that the annual budget will follow the Fiscal Year and not the PWOC calendar year. This will cause an overlap in budgets between PWOC Boards. What is the current budget that you inherited?

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Financial Liaison

4. Informs Board members of the procedures they should follow for submitting fund requests.

- Share what you have learned about the fund request (POR) process with the Board. You are the subject matter expert!
- Make your expectations clear. What form will Board members use, or will you fill out the form? Where do they find it? When is the deadline? What is your role in the process? What is theirs?
- Be proactive in watching for upcoming events on the PWOC calendar that may need funding. If you know it will take six weeks for a Purchase Order Request to be approved, stay two months ahead on the calendar. Give Board members ample warning to submit funding requests.
- This can be an intimidating and frustrating process for your peers on the Board. Make it as simple and streamlined as possible for them.

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5. Manages Purchase Order Requests; checks on their status until approval is confirmed, and purchase is complete.

- Follow Purchase Order Requests (PORs) from start to finish. Make sure they are progressing at the expected rate. Keeping a healthy relationship with the Funds Manager is essential for information flow. Be persistent but ALWAYS be kind and respectful. You represent PWOC. It is vital you make a positive impression in every interaction.
- Once the POR is approved, be a liaison between the Funds Office and the requesting Board member. Help the purchaser (Board member) and the government credit card holder connect with each other. Help your Board member follow all protocol in their purchase; make sure they know the rules! Ask for a copy of the receipt.

Financial Liaison

6. Keeps copies of all receipts. Maintains records of expenditures.

- Make sure you have a copy of every Purchase Order and final receipt.

- Your position will likely not operate like an accountant; this can be frustrating to someone with an accounting background. The amount of money you “have in the bank” will fluctuate. PWOC may be part of a large community account that everyone shares. The process can be messy. Just focus on following protocol and keeping good records.
- Compare notes with the Resource/Funds Manager from time to time to make sure you are on the same page.

Financial Liaison

7. Coordinates offering collection with local Chapel staff, following local protocol. Keeps records of offerings received. Keeps records of other donations (if applicable) from a Chapel congregation or other source.

- If you are going to take up an offering at PWOC, what is the protocol? Find out if you are responsible to pick up a bank deposit bag or deposit form ahead of time. Who is your point of contact at the Chapel? How many offering counters will he/she need?
- Do you have an option for online giving? QR code? How might you implement this type of offering?
- Monitor offerings and be willing to give a devotion on the importance of giving to the ministry. Educate the PWOC body on how the collection is used (watchcare, supplies, event expenses, etc.).
- At the key financial meetings (if appropriate) inquire about the willingness of Protestant Chapel congregations to invest in the PWOC account. Keep records of any donations or transfers.

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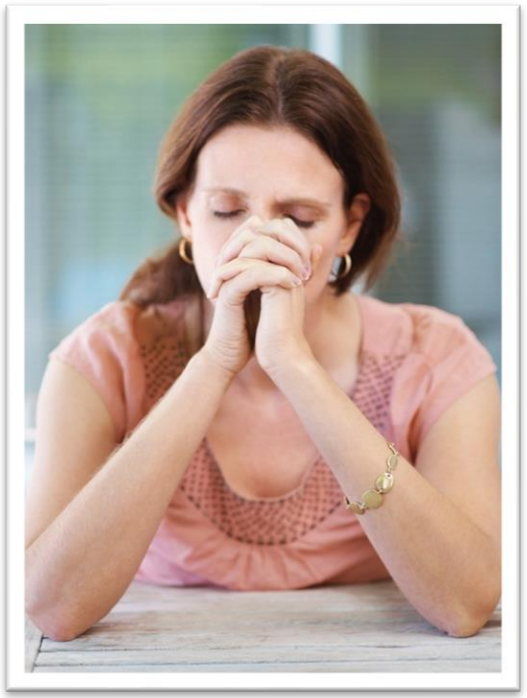
Financial Liaison

8. Keeps the President and the Board informed of PWOC's financial standing throughout the year.



- The President needs to be aware of the account standing of PWOC throughout the year. As you learn financial information, pass this along to her as well.
- If the funds are reduced, how does this impact upcoming events? Involve the Board in a discussion when needed; let them help troubleshoot. Diligently pray for the Lord to bless the ministry with unexpected funds! He can do it!
- Be open with the Board about where PWOC stands financially—they cannot spend if the money is not there! Your role is to educate and inform.

Some final thoughts...

Finances on a military installation can be complicated. Funding may be abundant or non-existent. Whatever your situation, look to the One who is the ultimate Provider. He is Lord over your financial situation. He can make a way where there is no way. Choose to keep that focus and help your Board focus there. May God abundantly bless you as you lead!

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