Syllabus - Crown Budget Coach Training Course 2025

Master Trainer: Randy Rowekamp

Meeting Schedule:
- Thursday, January 30: Group Introductions and review of Edvance360
- Thursday, February 6: Review of Lesson 1
- Thursday, February 13: Review of Lesson 2
- Thursday, February 20: Review of Lesson 3
- Thursday, February 27: Review of Lesson 4
- Thursday, March 6: Review of Lesson 5
- Thursday, March 13: Review of Lesson 6
- Thursday, March 20: Review of Lesson 7

Time of meetings: Thursdays, 7PM ET

Location of class: Online via Zoom

Course Objective: Prepare the student to coach clients using Crown Financial Ministries materials.
This includes equipping coaches to help clients learn biblically based financial principles, model responsible stewardship of God's resources and encourage God-honoring financial decision-making.

Course Description: A seven-week course under the guidance of a Master Budget Coach Trainer, meeting two hours each session. The course includes synchronous and asynchronous teaching using multimedia presentation, biblical study, and case study methodology. Upon successful completion of the course, the trainee becomes a Crown Certified Budget Coach, mentored by a Budget Coach Team Leader.

Textbooks: *The Bible*, *Crown Budget Coach Manual*, *Edvance360 learning management system*, *Personality ID Manual*.

Course Format: Synchronous and asynchronous online and/or face-to-face teaching using multimedia presentation, biblical study, and case study methodology.

Course Pre-Requisites:

Personal Requirements and Commitments

- Be a genuine follower of Jesus who has a living, vibrant relationship with God
- Be active in a local Christian church congregation
- Have a genuine love for people and a passion to see them grow in their relationship with Christ while gaining financial peace
- Willingness and ability to lead online virtual meetings (Zoom, Google Meet, etc.)

- Be comfortable using a computer including email, Microsoft Excel, Google Sheets, web-based online learning tools, and ability to organize uploaded and downloaded electronic documents.
- Be generous and organized with their own finances. This includes having lived on a budget for at least three months, and, if in debt, working toward paying off debts. They also need to be actively saving for the future.
- Be committed to not solicit business from a client for personal gain

<u>To be completed before starting training</u>

- Completed application and interview with Crown Budget Coaching program leadership
- Signed authorization form from students' church pastor or spiritual leader
- Confirmation of agreement with the Crown Budget Coach Volunteer Agreement, which will be signed by the student and Crown after completing training

Time requirement: Each meeting is two hours in duration. Preparation for each lesson will take between 4 and 7 hours.

Course Content:

- Practical Budgeting Techniques
- Biblical Application
- Peer-To-Peer Learning
- Role Play
- Coaching Practice Tips
- Use of Money Life Indicator Assessment
- Biblical Principles
- Case Study Analysis
- Use of Crown Financial Forms
- Online Professionalism Skills
- Use of Personality ID Assessment
- Quizzes
- Videos

Grading Criteria: Grading is weighted as follows:

• Bible Analysis and Application	20%
• Quizzes	10%
• Lab / Case studies	30%
• Personal application of financial forms	20%
• Participation and online professionalism	20%

Grading scale:

A = 90-100
B = 80-89
C = 70-79
D = 65 – 69
F = Below 65

Penalty for late work:

- 10 percent off if turned in after the assigned deadline, but no later than 3 hours before class
- 20 percent off if turned in after 3 hours before class

Successful Completion: A overall final score of at least 80 (B) or greater. Individual assignments that are 70-79% will be reset for the student to edit. Assignments that are less than 70% will be completely reset for the student to repeat. Completing all coursework and achievement of a score of 80% or higher does not guarantee full certification as a Crown Budget Coach. The trainer reserves the right to assess whether the student is ready to begin coaching Crown clients.

Course Credit:

- International Coaching Federation Continuing Education Credit
- Crown Financial Ministries Certified Budget Coach

Course Outline

Lesson and Time	Topics Covered	Objective(s)	Evaluation	Assignments for next Meeting
Introductory Meeting **Trainer Preparation:** **2 hours** **Class Time:** **1-2 hours** **Student Preparation:** **1-hour** **Office Hours:** **1-2 hours** (Email, Text, Video chat or Phone)	• Introductions • Review Budget Coaching Volunteer Agreement • Review syllabus including evaluation criteria and course objectives • Introduce Crown Edvance360 system • Review financial forms: Introduce 30-day tracker • Assign homework for Lesson 1 – Getting Started	• Start developing relationships • Ensure understanding and acceptance of Crown's Budget Coaching agreement • Understand rigor of homework requirements, grading and meeting logistics • Familiarity with the learning environment • Prepare trainee for online learning & submission of assignments • Clear homework expectations	• Class participation and professionalism	• Take the Money Life Indicator (MLI) Assessment • Take the Personality ID (PID) Assessment • Review videos and learning notes for Lesson 1 • Complete personal financial goals • On your personal financial forms, complete the Assets and Liabilities and start completing the 30-day tracker
Lesson 1 - Getting Started **Trainer Preparation:** **4 hours** **Student Preparation:** **5-6 hours** **Class Time:** **2 hours** **Office Hours:** **1-2 hours** (Email, Text, Video chat or Phone)	• Discuss insights from the students' MLI and PID assessments • Discuss Financial Goals • Discuss main ideas in Root of Riches (RR) videos • Review Financial Forms: questions about the 30-day tracker and Assets & Liabilities. Introduce the Current Spending form. • Review case study – client MLI and PID • Review homework for Lesson 2 • Role Play with typical client questions	• Deeper understanding of the MLI and PID that clients will take • Understand how to help clients fill out forms • Establish peer-to-peer learning environment • Familiarity with financial forms	• Percent completion of all Lesson 1 sections in Edvance360 Grading of: • Documents uploaded – MLI, PID, Financial Goals • Class participation and professionalism	• Complete Bible Study assignment, "God's Part Our Part" • Review videos and learning notes, and coaching practice notes for Lesson 2 • Complete Quiz • Complete Quit Claim Deed • Complete Current Spending section on personal financial forms • Continue completing the 30-day tracker Lab 1 Case study: Couple's MLI and PID assessment • Answer questions

Lesson and Time	Topics Covered	Objective(s)	Evaluation	Assignments for next Meeting
Lesson 2 - God's Part/Our Part **Trainer Preparation:** **4 hours** **Student Preparation:** **4-5 hours** **Class Time:** **2-hours** **Office Hours:** **1-2 hours** (Email, Text, Video chat or Phone)	• Discuss Bible study • Discuss financial forms. Review questions about the Current Spending form. Review typical questions for clients on their Current Spending. • Discuss Coaching Practice 1 notes including scheduling, whom to coach, recordkeeping, communication, data gathering and goals • Discuss Quit Claim Deed • Discuss use of Crown financial calculators • Discuss use of Christian Credit Counselors (CCC) • Review Lab – MLI and PID case study, including role play • Discuss insights from videos: God's Economy vs. Man's Economy • Review homework for Lesson 3 • Role play typical client questions	• Gain familiarity with Biblical principles • Solidify knowledge about available tools and resources • Familiarity with financial forms • Through role play, develop coaching and listening skills • Begin practical preparation for coaching clients	Percent Completion of Lesson Grading of: • Bible Study answers • Quiz • Lab – MLI & PID • Quit Claim Deed • Financial Forms • Class participation and professionalism	• Complete Bible Study assignment, "Becoming Debt Free" • Review videos, learning notes and coaching practice notes for Lesson 3 • Complete Quiz • Update Current Spending on personal financial forms Case Study A: low-income single mother • Develop a balanced budget in the spreadsheet • Answer questions
Lesson 3 - Becoming Debt Free **Trainer Preparation:** **4 hours** **Student Preparation:** **4-5 hours** **Class Time:** **1.5 – 2-hours (S)**	• Discuss Bible study • Discuss financial forms, focusing on updated Current Spending. Introduce Guidelines and New Budget forms. • Discuss Coaching Practice 2 notes including clients' mindsets (the SWs of coaching) and coaching etiquette • Discuss use of Debt Snowball tool • Discuss Frugal Ideas • Review Case Study A, including role play	• Gain familiarity with Biblical principles • Solidify knowledge about available tools and resources • Familiarity with financial forms • Through role play, develop coaching and listening skills • Continue practical preparation for coaching clients	Percent Completion of Lesson Grading of: • Bible Study answers • Quiz • Case Study • Financial Forms • Class participation and professionalism	• Complete Bible Study assignment, "Contentment and Peace" • Review videos, learning notes and coaching practice notes for Lesson 4 • Complete Quiz • Complete Guidelines and New Budget on personal financial forms Case Study B: middle age family with high

 Template updated January 20, 2025

Lesson and Time	Topics Covered	Objective(s)	Evaluation	Assignments for next Meeting
Office Hours: 1-2 hours (Email, Text, Video chat or Phone)	• Discuss insights from videos: Manage Your Money and Debt Free Living • Review homework for Lesson 4 • Role play typical client questions			income, no savings, high debt, rental property • Develop a balanced budget in the spreadsheet • Complete a Debt Snowball plan • Answer questions
Lesson 4 - Contentment and Peace **Trainer Preparation: 4 hours** **Student Preparation: 3.5-4.5 hours** **Class Time: 1.5 – 2-hours** **Office Hours: 1-2 hours** (Email, Text, Video chat or Phone)	• Discuss Bible study • Discuss financial forms. Review questions about Guidelines and New Budget forms and introduce maintenance forms. • Discuss Coaching Practice 3 notes including serving your client well and learning to be a good coach • Discuss use of the Wish List and the Contentment blog post • Review Case Study B, including role play • Discuss insights from video: Redemptive Stewardship • Review homework for Lesson 5 • Role play typical client questions	• Gain familiarity with Biblical principles • Solidify knowledge about available tools and resources • Familiarity with financial forms • Through role play, develop coaching and listening skills • Continue practical preparation for coaching clients	Percent Completion of Lesson Grading of: • Bible Study answers • Quiz • Case Study • Financial Forms • Class participation and professionalism	• Complete Bible Study assignment, “Giving and Saving” • Review videos, learning notes and coaching practice notes for Lesson 5 • Complete Quiz • Complete maintenance plan on financial forms and begin tracking first month spending against budget Case Study C: couple with no kids, mid income, some savings • Complete, assets, liabilities, income and spending from paystubs and bank statement • Answer questions
Lesson 5 - Giving and Saving **Trainer Preparation: 4 hours** **Student Preparation: 4.5-5.5 hours** **Class Time:**	• Discuss Bible study • Discuss financial forms. Review questions about maintenance forms. • Discuss Coaching Practice 4 notes including coach faithfulness and additional best practices • Discuss use of the Savings Goals, Savings	• Gain familiarity with Biblical principles • Solidify knowledge about available tools and resources • Familiarity with financial forms • Through role play, develop coaching and listening skills • Continue practical preparation for coaching clients	Percent Completion of Lesson Grading of: • Bible Study answers • Quiz • Case Study • Financial Forms • Class participation and	• Complete Bible Study assignment, “Legacy” • Review videos, learning notes and coaching practice notes for Lesson 6 • Complete Quiz • Continue tracking spending against budget on personal financial

Lesson and Time	Topics Covered	Objective(s)	Evaluation	Assignments for next Meeting
2-hours **Office Hours:** **1-2 hours** (Email, Text, Video chat or Phone)	Tracker and interest calculators • Review Case Study C, including role play • Discuss insights from videos: Giver, Saver, Investor • Review homework for Lesson 6 • Role play typical client questions		professionalism	forms Case Study D: single man approaching retirement • Develop a balanced budget in the spreadsheet • Address preparation for retirement • Answer questions
Lesson 6 - Legacy **Trainer Preparation:** **4 hours** **Student Preparation:** **6-7 hours** **Class Time:** **2 hours** **Office Hours:** **1-2 hours** (Email, Text, Video chat or Phone)	• Discuss Bible study • Discuss financial forms. Review questions about tracking against the budget. • Discuss Coaching Practice 5 notes including four levels of financial health • Discuss which of the four levels of financial difficulty applies to each of our four case studies • Review Case Study D, including role play • Discuss insights from videos: S.A.L.T Plan • Review homework for Lesson 7 • Role play typical client questions	• Gain familiarity with Biblical principles • Solidify knowledge about available tools and resources • Familiarity with financial forms • Through role play, develop coaching and listening skills • Continue practical preparation for coaching clients	Percent Completion of Lesson Grading of: • Bible Study answers • Quiz • Case Study • Financial Forms • Class participation and professionalism	• Review videos, learning notes and coaching practice notes for Lesson 7 • Complete MLI post-course assessment • Read ICF Code of Ethics and Core Values • Review the Coach Manual • Review the Resource Repository • Complete My Budget Coach Training Story to provide feedback on this course Case Study E: middle-age couple with 3 teenagers • Develop new budget • Develop budget tracking and maintenance plan • Analyze one month's actual spending vs. budget
Lesson 7 - Conclusion **Trainer**	• Discuss the ICF Code of Ethics and Core Values • Discuss Coaching	• Understanding and alignment with ICF • Understanding of how to get started	Percent Completion of Lesson	• Sign the Crown Budget Coach Agreement • Take a client

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Lesson and Time	Topics Covered	Objective(s)	Evaluation	Assignments for next Meeting
Preparation Time: **2 hours (A)** **Preparation Time:** **1-hour, 40 minutes (A)** **Class Time:** **1.5 – 2-hours (S)** **Office Hours:** **1-2 hours** (Email, Text, Video chat or Phone)	Practice 6 notes – practical steps to budget coaching • Discuss the Coach Manual • Discuss the Resource Repository • Review Case Study E, including role play • Review client management checklist • Role play typical client questions • Celebrate	with their first client • Knowledge of where to go for additional resources and questions • Through role play, develop coaching and listening skills • Encouragement for their new ministry	Grading of: • MLI Score Summary • Case Study • Class participation and professionalism	within 30 days of completing this course • Utilize the mentoring services of your trainer with your first few clients • Take at least 4 clients in your first 2 years
Ongoing Mentoring and Continuous Learning **Team Meetings:** **4 per year, 1-hour each;** **4 hours** **Mentoring time as needed**	The Trainer (now the team leader) walks with the Coach providing support and encouragement as he/she coaches clients Meet at least quarterly for: • Presentation of topics for continuous learning and improvement • Panel discussions • Answering questions • Developing coach peer relationships	• Cultivation of Learning and Growth • The coach has resources to consult when new or difficult situations arise • There is partnership between coach and clients • The coach supports client autonomy in the design of goals, actions, and methods of accountability • The coach celebrates the client's progress and successes	N/A	N/A

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