

5 minutes - Welcome/Prayer

The Crown Budget Coach Training will begin in 5-minutes.

5 minutes - Worksheet Revision Process - Ross

We hope you enjoy the time of worship music and fellowship.

20 minutes - Worksheet Review - Richard

10 minutes Q&A

10 minutes Sue

5 minutes Q&A

5 minutes Alet / Closing Prayer



TIME: 5-MINUTES

Thank you for attending the Crown Budget Coach Training. Once again, I want to introduce the Crown Budget Coach Leadership Team: Steve Brooks, Marilyn Butler, Sue Deer, Priscilla Douglas, Ross Hodges, Richard Miller, Randy Rowekamp, and Alet Strydom. Thank you for your service to Crown Ministries.

At this time, Steve Brooks will open our meeting in prayer.

Thank you, Steve.

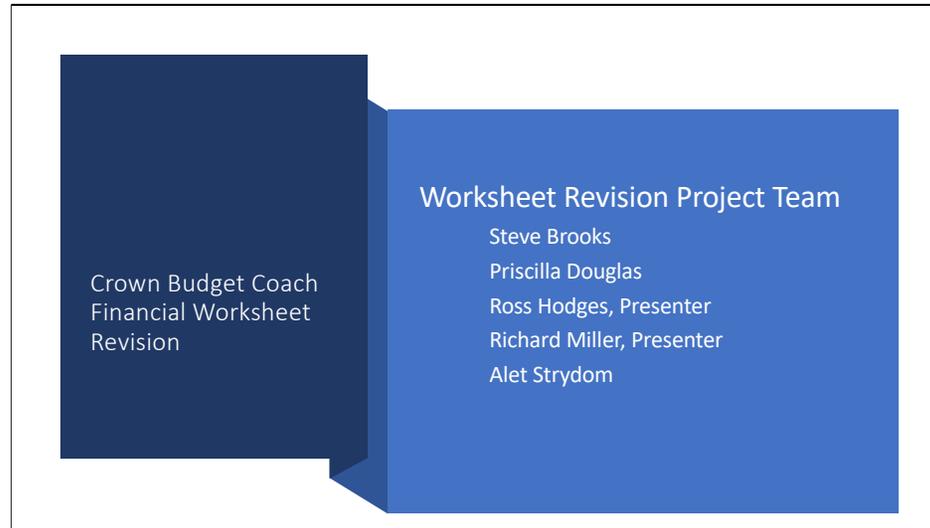
Agenda	Open in Prayer and Welcome
	CBC Worksheet Revision
	Questions
	CBC Course Content Revision
	Questions
	CBC Updates
	Close in Prayer

Thank you, Steve.

This evening we host an All-Crown Budget Coach Training to introduce the CBC Worksheet Revision and the CBC Course Content Revision, **both utilized in the client coaching process. The Crown Budget Coach Leadership Team works both as a strategy setting and decision-making team, and in smaller groups as functional Project Teams. We are dedicated to a process of continuous improvement with the review, recommendation, and revision of the coaching program and processes, annually, involving input from many Crown Coaches and Clients. All new clients beginning after December 8, 2022, will use these revisions. It is our intention to equip you to**

competently navigate the changes to both the financial forms and the course content revision. At the end of both the CBC Worksheet Revision and the CBC Course Content Revision presentations, you will have the opportunity ask questions of the presenter, using the “Chat” function of Zoom. Please type your question into Chat during the presentation to be discussed by the speaker.

At the end of the 1-hour training, we will close in prayer and stay on the Zoom call for at least 15-minutes to answer any additional questions or concerns.



The Crown Budget Coach Worksheet Revision Project Team is chaired by Ross Hodges. Teammates are Steve Brooks, Priscilla Douglas, Richard Miller, and Alet Strydom. They have worked diligently meeting once a week as a team and throughout the week individually.

Presenters for the Team are Ross Hodges and Richard Miller. Now, Ross, will tell us about the process for revision of the Financial Worksheets.

Budget Coach Worksheet Team

Project Overview -- Ross Hodges

- Team Goals
- Design Principles & Deliverables
- Continuous Improvement Process

Review of Changes -- Richard Miller



5-MIUTES ROSS

Thank you, Ross and Richard for this informative presentation and the work represented in this presentation by the Worksheet Project Team. Stop sharing at end of Ross' discussion – listen for “FINALLY” and be ready to STOP.

Thank you, Ross. Now, Richard will give us detailed instruction for the use of the financial forms.

20-MINUTES RICHARD

After Richard completes his discussion, begin sharing again.

Thank you, Ross and Richard, for sharing the Financial Form revisions and training the coaches on their use.

At this time, Alet Strydom will direct questions from Chat to the presenter. If you have a question, please put it in the Chat function. If

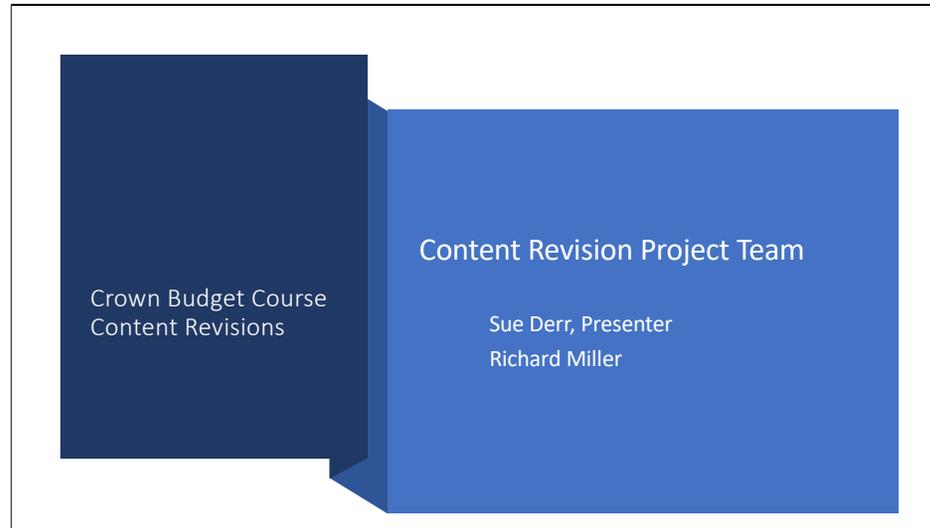
you have a question that does not get answered, consider saving it until the training is finished and the open discussion begins.

Following the time Question and Answers. Sue Derr will present the changes and updated course content revisions.



10-MINUTES FOR QUESTIONS

Thank you Alet



The Crown Budget Course Content Revision Project Team is chaired by Sue Derr. Teammates are Richard Miller, and Alet Strydom. They, too, have worked diligently responding to the many suggested updates and revisions to the Crown Budget Course. Sue Derr will present.

Sue Derr will present the revisions to the course content revisions.

Content Revision: An Overview

Who?

- Active coaches (Experienced eyes are valuable)
- Coaches-in-training (Fresh eyes provide a fresh perspective)
- Crown Budget Coach Leadership Team members

What?

- Small edits
- More moderate changes
- Significant changes



10 minutes Sue

Google Spreadsheet to gather suggestions from all CBC Leadership Team members we want to take the opportunity to thank you for any feedback you may have given to your trainer and/or Team Leader. These comments and suggestions made by you were part of the input that CBC Leadership Team members submitted

Uncountable number of edits made

Some tiny

- Punctuation
- Spelling
- Grammar

Some changes were simple on the surface, but more time-intensive to change, such as formatting.

Other, more significant changes were made in both the coach training course and the client course.

Going forward, I will focus on the changes to the client course, since the training is behind you and those changes do not affect you.

Application and Evaluation (Bible Study)

Questions: Bible study and personal application for the client

Feedback: Suggested Essay/Response which clients can read when they check their assignments for coach feedback.

Notes: The section clients read after completing the Application and Evaluation section of each lesson



Quick review of the three areas of the Application and Evaluation section that received edits.

- Questions: Bible study and personal application for the client
- Feedback: *Suggested Essay/Response* which clients can read when they check their assignments for coach feedback.
- Notes: The section clients read after completing the Application and Evaluation section of each lesson

Edits include changes made for:

- Greater clarity / better language use
- Reduction of redundancy
 - Replaced with other relevant questions
- Closer alignment to the intent of scripture. (For example, discussion on inheritance, God's control, sovereignty)
- Expansion of the "discussion" / increase comprehensiveness



- Some Questions and Feedback re-worded for greater clarity or better language use
- To reduce redundancy, some Questions replaced with other relevant questions related to that lesson's topic.
- Some Feedback was edited to more closely align to the intent of scripture.
 - **Changes in the way we discuss inheritance, God's control and gambling, attempting to more closely follow scripture.**
- Some Feedback and Notes edited to expand the discussion and make the answer more comprehensive.

Other Content Changes

- Commitment to Coaching
- Lesson Numbers Adjusted
- All links set to open in a new tab
- Personal Information sheet eliminated
- Removal of Pre/Post Test MLI worksheet
- Overview and Wrap Up/Looking Ahead sections eliminated
- The Principles of Work
- *Frugal Ideas* resource more readily available to clients



- Commitment to Coaching – **eliminated since this is now sent for e-signature prior to the Getting Started meeting**
- **Made Getting Started Lesson 1, which of course bumped back all other lessons by one number**
- All links set to open in a new tab
- **Eliminated the Personal Information assignment in Lesson 1, Getting Started since personal information is discussed both during client screening and in the introductory meeting**
- Removed the MLI Pre/Post test worksheet. Clients upload their complete MLI report. The coach will serve their client by completing this form for them and sharing it at the appropriate times.
- You may remember that we had an Overview at the beginning of each week's lesson, outlining what was to come. We also had a "Wrap up" or "Looking Ahead" section to let

them know what was would be covered the following week. We removed these, since the agenda and action lists were sometimes confusing. Also, because each client's situation and pace is different, removing these allows for more coach flexibility.

- The Principles of Work added to the end of the Notes for Lesson 2 (God's Part/Our Part)
- Frugal Ideas document added as a resource in Lesson 3, Becoming Debt Free. This was in the Resource Repository, but dependent upon the coach to share it with clients. Now any client can access it without the coach having to give access.

Other Content Changes

- Added *My Doc Vault* sections
- Save reminder
- Maintenance Plan appears earlier in course
- Closer scriptural alignment
- Family → Legacy
- Photo option
- PDFs more closely aligned to Excel forms
- New Financial Forms



- At the end of every lesson, a My Doc Vault section was added in case there is any information the client wants to upload for their coach review before their next meeting. We may end up deleting this in the future, and welcome feedback from you as to whether or not it is useful for your clients.
- At the end of every lesson, a reminder for the client to save any information from the course that they want to keep upon completion of the course.
- Moved the maintenance plan discussion to Lesson 3, as many clients are ready for starting one by this time, and simplified the steps
- Some changes in the way we discuss inheritance, God's control and gambling, attempting to more closely follow scripture.
- Changes made in multiple places to de-emphasize couples/family to be more inclusive for our many single clients. This begins in the information form, includes a title change to Lesson 5 from *Family* to *Legacy*, and also includes adjusting the questions in the Legacy chapter to be inclusive for our single clients. For example, one of our new questions is, "Describe how you can teach your children, or someone else you have the opportunity to mentor, to spend wisely."

- Added the option for clients to add their photo when they write their “story” in the Legacy lesson.
- PDF's financial forms, which will only be used by a small number of clients, have been adjusted to closely align with the new Excel forms.
- Ross and Richard have already done an excellent job of explaining the changes to the spreadsheets. Please remember that these are the forms that all coaches should be using with any new clients they start working with going forward. Remember you may have 2 client courses at one time while we are transitioning from Client Course 22 to Client Course 23.
- Again, thank you for your valuable input as coaches, leading to some of these changes. Keep your suggestions coming via your Team Leader. An extra big thanks to Richard and Alet for your vital work on this project.

Thank you, Sue the very thorough description of the content changes. It was informative and beneficial.

At this time, Alet Strydom will direct questions from Chat to the presenter. Following the time Question and Answers, Alet will present Crown Updates.



5-MINUTES Q&A

Thank you Alet

Now, Alet will provide us with Crown Updates.

Message from Alet Strydom
Director of Coaching and Assessments

Giving Thanks



Merry Christmas



5-MINUTES Alet / Closing Prayer

Thank you, Alet
Please stay online to participate in the open forum and to ask your questions.
Now, our sister in Christ, Priscilla Douglas, will close in prayer.



CROWN™

Advancing God's Principles of Stewardship and Life



