GUIDE FOR INSTRUCTORS

# Ledgerly Instructor Guide

*Lead classes and small groups that change how people handle money*

**Learn to:**

- Run your cohorts from the Instructor dashboard
- Take attendance in under a minute
- Post assignments and message your class
- Follow each student's lesson progress
- Lead a 90-minute session people look forward to



*"The things you have heard me say... entrust to reliable people who will also be qualified to teach others."* 2 Timothy 2:2

# This guide is for you.

Ledgerly brings together courses, money tools, workbooks, and certificates for every group and every member. Print it, copy it, and share it with your congregation.

## HOW TO USE THIS GUIDE

1. Read Chapters 1 and 2 before your first class — they cover every screen you'll use.
2. Keep Chapter 5's session plan open when you prepare each week.
3. Print workbooks for your group before week one (the course page and the Workbooks page have the PDF for the courses you teach).
4. Revisit Chapter 6 whenever a conversation gets hard.

## PRINCIPLES WE KEEP

- You're discipling stewards, not grading students.
- Scripture first, then the math, then the plan.
- Never ask to see anyone's private budget, debts, or accounts.
- What's shared in the group stays in the group.
- Refer tax, legal, and crisis questions to qualified help.

> **When a student discloses abuse or crisis**
>
> If someone shares that money is being used to control or threaten them, or that they're in danger, pause the lesson. Thank them, don't press for details in front of the group, and follow up privately. If anyone is in immediate danger, call 911. National Domestic Violence Hotline: **800-799-7233**. Follow your group's safeguarding policy and inform your pastor.

*"The things you have heard me say... entrust to reliable people who will also be qualified to teach others."* — 2 Timothy 2:2

LEDGERLY PLATFORM GUIDE · G03

# Ledgerly Instructor Guide

*Lead classes and small groups that change how people handle money — attendance, assignments, messages, and shepherding*

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**Ledgerly Instructor Guide**
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**For every group and member.** Groups and individuals may print, copy, and distribute this guide in whole or in part for non-commercial use, provided this page is included. It may not be sold.

**About the screens.** Menu names, buttons, and features are described as they appear on Ledgerly.app in September 2026. The platform is updated regularly; if a screen looks different, the newest edition of this guide is always linked in the footer of Ledgerly.app.

**Not advice.** Ledgerly is a teaching platform, not legal, tax, investment, insurance, or accounting advice, and no advisory or fiduciary relationship is created by using it.

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# Introduction

You said yes to leading a Ledgerly class. That’s no small thing. For many people in your group, this will be the first time anyone has talked about money with them honestly, without shame, and with an open Bible.

This guide covers two jobs: running the platform side of your class (cohorts, attendance, assignments, messages, and progress), and leading the room well.

## About This Book

The *Ledgerly Instructor Guide* is part of the Ledgerly Platform Guide Series. Your students have the *Student Guide*; your group administrator has the *Group Admin Guide*. For signing in and resetting passwords, see the *Ledgerly User Guide*.

Menu names and buttons appear in **bold**, exactly as on screen.

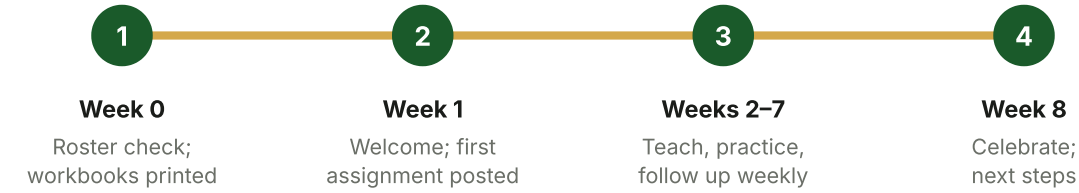
## This Guide at a Glance

### BY THE END OF THIS BOOK YOU WILL

1. Find your cohorts and roster on the Instructor dashboard.
2. Record attendance for each session.
3. Create assignments tied to lessons and message your class.
4. Use lesson progress and attendance to shepherd each student.
5. Plan and lead a 90-minute session.
6. Handle hard conversations with grace.

**Screens you'll use:** Instructor → Dashboard; My Cohorts; Attendance; Assignments; Messages; Workbooks.

FIGURE I-1 **An eight-week cohort**




## Foolish Assumptions

In writing this workbook, we made a few assumptions about you:

- You have a Ledgerly account with the **Instructor** role. (If you don't see **Instructor** in your menu, ask your group administrator.)
- Your group has set up at least one cohort — a group taking a course together — with you as its instructor.
- You're comfortable leading a discussion, even if you're not a finance expert.
- You'll take the course yourself, ideally a week ahead of your group.

## Icons Used in This Book

Look for these icons in the margins. Each one flags a particular kind of information:

**TIP**

A shortcut, a better way to do something, or a trick that saves time or money.

**REMEMBER**

Something important enough to keep in your head after you close the book.

**WARNING**

A mistake that costs real money, damages credit, or hurts people. Slow down when you see this one.

**TECHNICAL STUFF**

The math, law, or fine print behind a recommendation. Interesting, but you can skip it and still do the work.

## Beyond the Book

Ledgerly brings together the courses, the money tools, the workbooks, and these guides for every group and every member. Every track has a printable workbook on the **Workbooks** page, and every guide in this series is linked in the footer of **Ledgerly.app**.

## Where to Go from Here

Preparing for week one? Read Chapters 1 and 2, then use the checklist in Chapter 5.

Class starts in ten minutes? Chapter 2, Section 2.1 shows how to take attendance.

Worried about a student? Chapter 4 shows how to read their progress, and Chapter 6 covers hard conversations.

PART 1

# Running Your Class on the Platform

The Instructor dashboard, cohorts, attendance, assignments, messages, and progress.


Chapter 1 Your Instructor Dashboard

Chapter 2 Attendance

Chapter 3 Assignments and Messages

Chapter 4 Following Student Progress

CHAPTER 1

# Your Instructor Dashboard

2 sections

**IN THIS CHAPTER**

- Finding the Instructor screen
- What the dashboard numbers mean
- Your cohorts and rosters

Everything you need for your class lives under **Instructor** in the left-hand menu. This chapter walks through the dashboard and your cohort list.

SECTION 1.1

## Open the Instructor dashboard

Choose **Instructor** in the left-hand menu. You'll see the **Instructor Dashboard** with tabs across the top: **Dashboard**, **My Cohorts**, **Attendance**, **Assignments**, and **Messages**.

**Dashboard numbers**

| Card | What it counts |
|---|---|
| My Cohorts | Groups where you're the instructor |
| Active Students | Distinct students across your cohorts |
| Attendance Rate | Present sessions as a share of all recorded sessions |
| Sessions | Class sessions you've recorded |
| Assignments | Assignments you've created |
| Total Enrolled | All enrollments in your cohorts, including completed |

Below the cards, **Upcoming Schedule** lists your next sessions and **Recent Activity** shows what's happened lately.



**REMEMBER**

If you see **No cohorts assigned yet**, your group administrator needs to connect you to a cohort. Nothing is wrong with your account.

SECTION 1.2

# Your cohorts and rosters

A **cohort** is a group taking one course together on a schedule — for example, *Budgeting Basics, Wednesday nights, fall*. Open **My Cohorts** to see each cohort's course, number of students, dates, status, and meeting schedule.

Open a cohort to see its **Roster**: each student's name, email, enrollment status, attendance rate, and **Lesson Progress** (lessons completed out of the course total).

**TIP**

Before week one, check the roster against your sign-up list. Anyone missing needs to be enrolled by your group administrator.

**WARNING**

The roster shows contact details and progress so you can care for your students. Don't export or share it outside your group's leadership.

**QUICK CHECK**

- [ ] I can open the Instructor dashboard.
- [ ] I know what each number means.
- [ ] I've checked my roster.

CHAPTER 2

# Attendance

2 sections

**IN THIS CHAPTER**

- Taking attendance during class
- Reading attendance history
- A simple attendance policy

Attendance takes less than a minute and tells you more about how your group is doing than almost anything else.

SECTION 2.1

## Take attendance

1. Open **Instructor** → **Attendance**.
2. Choose your cohort from **Select Cohort...**.
3. Choose **Take Attendance**. The **Session Date** defaults to today — change it if you're recording a past session.
4. Mark each student **Present**, **Absent**, **Excused**, or **Late**.
5. Choose **Save All**.

**TIP**

Take attendance during the break, not at the door. You'll greet people instead of checking boxes.

SECTION 2.2

## Attendance history

After you choose a cohort, the Attendance tab shows each recorded session with counts of present, absent, excused, and late students, and the rate for that session. Each student's own history appears on their progress view (Chapter 4).

### A simple attendance policy many groups use

| Situation | Suggested approach |
|---|---|
| One absence | Send a short message the next day with what you covered. |
| Two absences in a row | Personal call or text: “We missed you — everything okay?” |
| Excused absence | Offer the matching workbook pages to catch up. |
| Below 75% attendance | Talk privately about whether a different schedule would help. |

**QUICK CHECK**

- [ ] I can take attendance in under a minute.
- [ ] I know where to see attendance history.
- [ ] I have a plan for following up absences.

CHAPTER 3

# Assignments and Messages

3 sections

**IN THIS CHAPTER**

- Creating an assignment tied to a lesson
- Messaging your whole class
- Weekly message templates

Assignments give your group something concrete to do between sessions. Messages keep everyone connected. Used together, they carry the class through the week.

SECTION 3.1

## Create an assignment

1. Open **Instructor → Assignments** and choose **Create Assignment**.
2. Choose the **Cohort** and the **Lesson** it goes with.
3. Give it a **Title** and a **Description** with clear instructions.
4. Set the **Due Date** and choose **Create**.

**WARNING**

Students don't see assignments on their own screens yet. Every time you create one, send a class message (next section) with the title, instructions, and due date.

**Assignment ideas that work**

| Lesson topic | Assignment |
|---|---|
| Stewardship | Write a two-sentence stewardship statement. |
| Budgeting | Build next month's budget in the **Budget** tool. |
| Debt | List every debt in the **Debt Snowball**, smallest balance first. |
| Saving | Create a **Savings Goal** for a $1,000 starter emergency fund. |
| Giving | Decide a giving percentage and set it up. |
| Any lesson | Complete the lesson's Try It exercise in the workbook. |

SECTION 3.2

## Message your class

1. Open **Instructor → Messages** and choose **Send Message**.
2. Choose the **Cohort**, add a **Subject**, and write your **Message**.
3. Choose **Send to Class**.

Every student in the cohort receives the message as an in-app notification (the bell at the top of the screen). Your sent messages, with recipient counts, stay in the **Messages** tab.

**TIP**

Students can't reply inside Messages. Invite replies by email or text.

SECTION 3.3

## Messages for a normal week

| When | Message |
|---|---|
| Day after class | "Great session! This week: [assignment], due [date]. Workbook pages [x–y]." |
| Midweek | "How's the budget coming? Reply with one win and one question." |
| Day before class | "See you tomorrow at [time]. Bring your debt list and a pen." |
| After an absence | "Missed you! Here's what we covered and the pages to read." |

**QUICK CHECK**

- [ ] I've created an assignment and announced it by message.
- [ ] I've sent a class message.
- [ ] I have a weekly message rhythm.

CHAPTER 4

# Following Student Progress

3 sections

**IN THIS CHAPTER**

- Reading a student's progress
- Turning signals into care
- Respecting privacy

Progress numbers aren't a report card. They're a way to notice who might need encouragement before they quietly drop out.

SECTION 4.1

## Read a student's progress

From a cohort's roster, open a student's progress view. You'll see their enrollment status, attendance (present out of total sessions), and lesson progress — which lessons are completed, in progress, or still locked, with completion dates.

**REMEMBER**

Lessons unlock in order. A student "stuck" on a lesson has simply not marked the previous one complete yet.

SECTION 4.2

## Signals and responses

| What you notice | A caring response |
|---|---|
| No lessons completed after two weeks | "Want to do Lesson 1 together before class?" |
| Attendance slipping | "We've missed you. Is the time still working?" |
| Same lesson for three weeks | Offer a 15-minute call; pair them with a peer. |
| Finished every lesson | Celebrate in class (with permission) and suggest the next course. |

SECTION 4.3

# Privacy

You can see lesson progress and attendance. You can’t see — and should never ask to see — a student’s budget, debts, savings, or net worth. Those tools are private by design.

**WARNING**

Never share one student’s progress or story with another student. Ask permission before celebrating anyone publicly.

**QUICK CHECK**

- [ ] I can read a student’s progress.
- [ ] I have a plan for common signals.
- [ ] I understand what I can and can’t see.

PART 2

# Leading the Room

Session plans, facilitation, and shepherding people through hard money conversations.


**Chapter 5** Leading a Great Session

**Chapter 6** Shepherding Hard Conversations

CHAPTER 5

# Leading a Great Session

3 sections · Colossians 3:16

**IN THIS CHAPTER**

- Preparing in 30 minutes
- A 90-minute session plan
- Using the printed workbooks in class

You don’t need to be a financial expert. You need to be prepared, warm, and anchored in Scripture. This chapter gives you a plan you can repeat every week.

SECTION 5.1

## Prepare in 30 minutes

1. Read the week’s lessons yourself and do the Try It exercises.
2. Pick one Scripture and one story to anchor the session.
3. Check your roster and last week’s attendance.
4. Print or bring workbooks for anyone who needs them.
5. Pray for each student by name.

SECTION 5.2

## A 90-minute session

| Minutes | Segment |
|---|---|
| 0–10 | Welcome, prayer, and a one-word check-in: “How was your money week?” |
| 10–35 | Teaching: the lesson’s Scripture and main idea |
| 35–50 | Discussion in groups of three or four using the lesson prompts |
| 50–60 | Break and attendance |
| 60–80 | Practice: work on the Try It exercise or a money tool together |
| 80–90 | Wins, prayer, and the week’s assignment |

**TIP**

For a 60-minute session, shorten teaching to 15 minutes and practice to 15.

SECTION 5.3

## Using the workbooks in class

Every track has a printable workbook. You'll find the one for each course you teach on its course page and on the **Workbooks** page. Its chapters match the courses and its lessons match the lessons, so your group can work on paper while you teach from the screen. Each workbook includes fill-in forms, discussion prompts with writing space, a Part of Tens, and a tear-out cheat sheet.

**REMEMBER**

The workbooks are free to print and copy for teaching. Print one per person — people finish what they write in.

**QUICK CHECK**

- [ ] I have a preparation routine.
- [ ] I have a session plan.
- [ ] My group has workbooks.

CHAPTER 6

# Shepherding Hard Conversations

3 sections · James 1:19

**IN THIS CHAPTER**

- Creating a safe room
- Common situations and what to say
- When to refer

Money touches shame, marriage, fear, and faith all at once. Sooner or later a conversation in your group will get hard. That’s usually a sign it’s working.

SECTION 6.1

## Create a safe room

> *Everyone should be quick to listen, slow to speak and slow to become angry.*
>
> James 1:19

- Agree on confidentiality in week one: stories stay in the room.
- Nobody has to share numbers. Ever.
- Share your own story first — including a mistake.
- Celebrate small wins loudly: a first budget, a paid-off card, a $50 deposit.

SECTION 6.2

## Common situations

| Situation | What to say |
|---|---|
| A couple starts arguing | "You're both clearly passionate. Let's pause and pick this up together after class." |
| Someone shares a crisis | "Thank you for trusting us. Can we pray right now? I'll follow up with you after." |
| One person dominates | "Great point — let's hear from someone who hasn't shared yet." |
| The room goes silent | "Take two minutes to write your answer, then share with one person." |
| Someone asks for tax or legal advice | "That's a great question for a licensed professional. Let's talk about what to ask them." |

SECTION 6.3

## When to refer

Some needs are bigger than a class. Know where to send people before you need to:

- Your pastor or care team for grief, marriage strain, or spiritual crisis
- Your group's benevolence ministry for urgent practical needs
- A licensed tax professional, attorney, or financial planner for specific advice
- Emergency services or a crisis hotline for anyone in danger

**REMEMBER**

Referring someone isn't passing them off. It's making sure they get the right help while you keep walking with them.

**QUICK CHECK**

- [ ] My group has agreed on confidentiality.
- [ ] I know what to say in common hard moments.
- [ ] I know where to refer people.

PART 3

# The Part of Tens

Quick reminders for the ten minutes before your group arrives.

CHAPTER 7

# Ten Ways to Lead a Great Session

1. **Start with prayer**
   Every session, every time.
2. **Arrive early**
   The best conversations happen before the official start.
3. **Open the Bible first**
   Scripture before spreadsheets.
4. **Tell your own story**
   Vulnerability invites vulnerability.
5. **Keep teaching short**
   People change by doing, not by listening longer.
6. **Practice in the room**
   Build budgets and debt lists together.
7. **Take attendance at the break**
   Greet at the door; count later.
8. **Message within 24 hours**
   Recap, assignment, and encouragement.
9. **Follow up absences**
   A personal message keeps people from drifting.
10. **Celebrate wins**
    Every paid-off debt deserves applause.

APPENDIX A

# Instructor Troubleshooting

| Problem | Try this |
|---|---|
| I don’t see **Instructor** in my menu | Ask your group administrator to request the Instructor role for you. |
| **No cohorts assigned yet** | Your group administrator needs to connect you to the cohort. |
| A student is missing from the roster | They need to be enrolled in the cohort by your group administrator. |
| Attendance won’t save | Make sure a cohort is selected and every student has a status. |
| Students didn’t see my assignment | Assignments aren’t shown to students yet — send a class message. |
| A student didn’t get my message | Messages arrive in the notification bell; ask them to check it after signing in. |

APPENDIX B

# Glossary

**Assignment**
A task tied to a lesson, with a due date, created for a cohort.

**Attendance rate**
Present sessions as a share of all recorded sessions.

**Cohort**
A group taking one course together on a schedule.

**Excused**
An absence you've agreed doesn't count against the student.

**Lesson progress**
How many of a course's lessons a student has marked complete.

**Roster**
The list of students in a cohort.

**Session**
One meeting of a cohort.

APPENDIX C

# Getting Help

- **Your group administrator** — roles, cohorts, enrollments, and email settings.
- **The Ledgerly Student Guide** — give it to your students on day one.
- **The Group Admin Guide** — share it with whoever sets up your cohorts.
- **The track workbooks** — on the course page and the **Workbooks** page for each course you teach.

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## Notes

CHEAT SHEET

# Instructor Quick Reference

*Keep it in your teaching folder.*

## ATTENDANCE

**Attendance** → cohort → **Take Attendance**

Present · Absent · Excused · Late → **Save All**

## ASSIGNMENTS

**Assignments** → **Create Assignment**

Cohort · Lesson · Title · Description · Due Date

Then announce it by message.

## MESSAGES

**Messages** → **Send Message** → **Send to Class**

Arrives in each student's bell.

## 90-MINUTE PLAN

Welcome 10 · Teach 25 · Discuss 15

Break 10 · Practice 20 · Wins & prayer 10

## SIGNALS

No progress in 2 weeks → offer help.

Two absences → personal call.

## NEVER

Ask to see anyone's private money data.

Share a student's story without permission.

GROUP MINISTRY / PLATFORM GUIDE

# Lead a class that changes lives

For many people, a Ledgerly class is the first time anyone has talked with them about money honestly, without shame, and with an open Bible. This guide helps you lead that class well.

Learn the Instructor screens — cohorts, attendance, assignments, messages, and progress — then get a repeatable 90-minute session plan and wise words for the hard moments.

## Inside...

- ✓ The Instructor dashboard
- ✓ Attendance in under a minute
- ✓ Assignments and class messages
- ✓ Following student progress
- ✓ A 90-minute session plan
- ✓ Shepherding hard conversations

**Ledgerly** is a biblical financial literacy platform for groups and their members — 18 tracks, 277 courses, printable workbooks, money tools, and certificates. Written for class leaders, small-group facilitators, and mentors.

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THE LEDGERLY PLATFORM GUIDE SERIES

1. Ledgerly User Guide
2. Ledgerly Student Guide
3. **Ledgerly Instructor Guide**
4. Ledgerly Group Admin Guide