SMART CHURCH MANAGEMENT

A Quality Approach to Church Administration

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Smart Church Management

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God’s Plan

The Bible is very clear about the fact that God has a plan. The complexities of His plan are more than our human minds can comprehend, but don’t be disillusioned. He has things under control. Sometimes I sit in awe of how great God is. With all of our disobedience operating outside of His plan, He still manages to move us toward His perfect will.

A major part of God’s plan involves establishing churches that will train up His people to do the work of the ministry. With the great harvest just on the horizon, it is even more important for these churches to be prepared and equipped to handle the multitudes of people who will be flooding their gates.

“For as we have many members in one body, but all the members do not have the same function, so we, being many, are one body in Christ, and individually members of one another.” Romans 12:4-5

As these training churches are established, people will be prepared for what God has called them to do in the final days, and the church will be ready to handle the harvest. The discipleship and ministry responsibility rests on the pastors, but the administrative side of the church rests on those who have been given the responsibility to manage church resources.

*“And God has appointed these in the church: first apostles, second prophets, third teachers, after that miracles, then gifts of healings, helps, **administrations**, varieties of tongues.” 1 Corinthians 12: 28*

God gives the church resources – people, time, money – and people give of their time to volunteer and tithe on their income. So managing God’s resources is a huge responsibility that should not be taken lightly. This eBook has been written to help those with that responsibility.

CHAPTER 1: Mission, Vision and Values

I believe that every church has a part to play in God's plan and should take time in prayer to seek God's vision for their particular body of believers and work toward seeing that vision come to pass. The vision of each church supports God's "master" plan to influence a city or a nation. All the churches working together participate in knitting the tapestry of God's perfect plan around the world.

"Write the vision and make it plain on tablets, that he may run who reads it. For the vision is yet for an appointed time." Habakkuk 2:2-3

Before an organization can be led, it needs to know why it exists, where it is going and the steps that are required to get there. This is why it is important to have a guiding Mission, Vision and Values statement that articulates why the church exists, where it proposes to go, and what guiding principles will help direct its decision-making. Those who have been charged with the responsibility of overseeing the ministry – typically the church board - should be involved in the development of the Mission, Vision and Values Statement.

The Vision Statement

A vision statement provides direction and a target for the church. It is a tool to help the organization fulfill what God has called it to do. It is the bullseye!

The value of a church vision statement is that it gives church leadership, employees and congregants a shared goal. Every organization needs to understand where it is going before it can develop a strategic plan and map out steps for how to get there.

A church vision statement is typically two to three sentences that describe what the church hopes to become or achieve. Some organizations write paragraphs describing their vision, but I believe that the shorter the statement, the more likely employees, volunteers and congregants will be able to absorb it, memorize it, and explain it to others. It is important for the entire congregation to have a good understanding of what the church is trying to accomplish so that everyone can buy into and support the vision.

Seven steps to writing a church vision, mission and values statement.

1. Gather church leadership.

Writing the church's Vision, Mission and Values statement should be an exercise that is done by the church board and some senior church members or staff. Ideally, this would be done in a retreat setting, such as a private room in a restaurant, a hotel conference room, or someone's home. It just needs to be a place without interruptions and distractions.

2. Solicit help from an objective facilitator.

The beauty of the church is that God blesses churches with a wide variety of gifts, and a church congregation may have professionals available who are gifted at facilitation and may be interested in facilitating a Vision, Mission and Values session. If there is no one on the board or in the congregation who has this skill set, it may be worth investing in a couple of hours with a professional who can help. Regardless, the facilitator should drive the process and not the vision. An experienced facilitator will know how to do this.

Commit your works to the Lord, and your thoughts will be established.
Proverbs 16:3

3. Dream out loud.

A visioning session is the "writing-on-tablet" process and should be prayed through before the session begins. The goal is to articulate God's will for the church. Once the session begins, I like working with whiteboards or flipcharts because I think a visual helps spark thoughts and ideas.

Depending on the number of people in the session, have the group break down into units of 3-4 people, provide each group with a flip chart, and have them discuss and answer the following questions:

- Who are we?
- Where does God want us to go?
- What do we want this church to look like?
- Where do we want to be 1, 5, 10 years from now?
- As a group, create a newspaper headline about something the church has done/accomplished at some future point. This helps the group visualize the future.

4. Combine ideas, and at the end of this session:

- Have all the units come back together and tell the group the thoughts and ideas they came up with.
- Use the entire group to pick the best and most consistent thoughts and ideas from each of the smaller groups and simply write the common words on a flipchart.
- Go around the room and allow all the participants to begin to add/subtract and formalize the sentence structure of the statement. Have a laptop available to use a thesaurus, dictionary and encyclopedia/search engine as references.

5. Test the statement.

Once a couple of sentences have been written, read them out loud to the group again and determine if the entire group agrees that the statement reflects a common direction and describes a picture of an ideal future state of the church. Following are some example vision statements:

- Caterpillar: Be the global leader in customer value.
- DuPont: The vision of DuPont is to be the world's most dynamic science company, creating sustainable solutions essential to a better, safer and healthier life for people everywhere.
- Heinz: Our Vision, quite simply is to be the world's premier food company, offering nutritious, superior tasting foods to people everywhere.
- Sears: To be the preferred and most trusted resource for the products and services that enhance home and family life.
- Avon: To be the company that best understands and satisfies the product, service and self-fulfillment needs of women globally.

6. The Mission Statement

Once the vision statement is written, do a similar exercise to come up with a mission statement. Remember a mission statement is a short description of "why" the organization exists. Vision and mission statements are the cornerstone for decision making. I used to work for a pediatric hospital, and the mission was "We will do what is right for kids." It is simply stated, but it is very powerful in the boardroom. When challenged with difficult questions, senior leadership would ask: "Is this decision in the best interest of the kids we serve?" This tool helps keep the organization focused on its priorities. A great book that can help teach your group how to simplify a message is Made to Stick, by Chip and Dan Heath.

- While in the same units, spend 20-30 minutes writing down descriptive words for why the church exists.
- After all the units have written their ideas on the flip chart, have each unit present its ideas to the whole group.
- Using one flip chart, combine ideas and begin “wordsmithing” the ideas until the group creates a short phrase that reflects all ideas.
- Have all the units read the final statements and come to an agreement that the phrase truly reflects the mission of the church and why it exists.

7. The Values Statement

Once there is a vision and mission statement, break the group into units again and allow them 20 minutes or so to list values (value = a principle, standard, or quality considered worthwhile or desirable) of the organization. Remember, these will become shared values or principles that the organization operates by.

- Once each unit has its list, have them present it to the entire group. Combine ideas and refine them into one list. There are usually a lot of ideas that overlap (which is a good thing).

- Ideally, a list of values should be 5-10 words. The goal is for people who align themselves with the organization to be able to simply memorize the Vision, Mission and Values. The more concise the better.

That wasn’t so difficult, was it? Many churches and nonprofit organizations fail to come up with a Vision, Mission and Values statement because the process scares them, but with the right people in the room, it can be done in a few hours. Once a Vision, Mission and Values statement is written, the strategic planning process can begin!

CHAPTER 2: Strategic Planning

Once the vision is articulated, the next step is to develop a strategic plan. A strategic plan articulates the mission and vision and creates a road map for getting there. The written plan describes where the church is today and how it will fulfill God's vision for the church. Strategic planning can be tedious. It takes a lot of time, thought and prayer. The process typically takes weeks or even months depending on how much time can be devoted to it on a day-to-day basis. Strategic planning should be done at the Board level with senior leadership involved.

The strategic planning process identifies **what** needs to be done (vision and strategic plan), **how** it gets done (organizational and departmental goals) and **who** will do it (employee and volunteer job descriptions). This structured process helps to ensure the vision is implemented throughout the entire organization.

Developing the Plan

Strategic plans help to map out the steps, process, and timeline to get from the present state of the organization to the desired future state. In order to do this, there are two different levels of planning required: short-term (3-6 months) and long-term (12-36 months). It used to be that strategic plans were written for anywhere from five to even ten years out, but as quickly as things change nowadays, a three-year plan is probably as aggressive as you can get without needing to modify the plan along the way.

Strategic Planning Process

The first step identifies the outcome—where do you want to be in three years? Take some time to brainstorm or visualize what that future state looks like. For example, strategic objectives or outcomes may be things like building a Bible school, planting churches, sending missionaries to certain parts of the world, or developing worship leaders—anything that supports the church vision.

Next, create a timeline for completion of your objectives and determine how many weeks, months or years it will realistically take to complete the objectives. This is done by thinking through the high-level action steps needed to complete the tasks involved.

Example:

Long-Term Three-Year Strategic Plan			
Strategic Objectives	**Year 1**	**Year 2**	**Year 3**
Reduce operating budget by 5%, from $1M to $950,000 by end of year 1.			
Grow volunteer base by 20%, from 250 to 350 by end of year 2.			
Grow church from 1200 to 1500 congregants by end of year 3.			
Plant church 50 miles from current church location by end of year 3.			

Once you've identified "where" you want to be (this should line up with the vision God has given your ministry), the next step is to start mapping out what it will take to get there. For example, to plant a church, what are the steps that need to be taken – i.e., identify church plant leader, identify new church location, decide on church model, transition plan for leader, timeline to new church opening, etc. This detailed planning can be put in the format of an action plan.

An action plan is merely a written document outlining the objectives (goals), action steps, responsible person(s), possible team members, due date for each action step and implementation status. Mapping this out creates a visual that is easy to see at a glance for what needs to be done and by when.

Example:

Strategic Objective	Action Steps	Responsible Person(s)	Due Date	Status
Plant church 50 miles from current church location.	Identify church plant leader.	Church Board	June 15, 20XX Year 1	
	Identify new church location.	Church Board	December 31, 20XX Year 2	
	Decide on church model.	Church Board	September 30, 20XX Year 2	
	Create transition plan for new church leader.	Church Board/Senior leaders	June 30, 20XX Year 2	
	Timeline for new church opening.	Senior Leadership	December 31, 20XX Year 1	
	Open new church.	Senior Leadership	September, 20XX Year 3	

As you create the action plan, you will identify objectives or steps that individual church departments need to take to support strategic objectives. As each department identifies its goals and objectives, it provides the information needed to write individual (or volunteer) job descriptions which support departmental goals, which support organizational goals and ultimately the strategic plan.

This graphic shows how goals and accountability flow throughout the organization.

Organizational Goals

As the organization works toward accomplishing the strategic plan, there needs to be a structured process to take the organization from where it is to where it wants to be. This can be done by developing annual organizational goals. Annual goals are written to break long-term goals into bite-sized pieces. This provides the framework for accomplishing them in steps and stages rather than all at once, and it serves as a tool for performance monitoring. This is done by taking the goals down to the departmental and staff level and ensures that what staff members are doing day-to-day lines up with the vision and goals of the organization. It is easy for employees to get off track day-to-day, but this process will keep them focused on the organization’s priorities.

Goals are important because they provide direction, clarify job roles, give employees something to strive for, and help make the vision attainable. Writing down your goals makes them more real and achievable because it allows you to see where you are going and which steps you must take to get there.

The structured process should include a cycle that begins with writing goals, communicating expectations, monitoring performance toward goals, assessing performance and ends with the performance appraisal. This cycle is repeated on an annual basis.

Once the organization has some direction for the next twelve months, the organizational priorities can be delegated to individual departments. This step ensures that there is a person or a group of people with responsibility for goal completion.

Example:

Year 1 Church Annual Goals

- Increase weekly attendance by 10% (120 people based on 1200 member church).
  - *This supports the strategic objective of growing the church to 1500 people in three years.*
- Increase the number of church volunteers by 20% (50 new volunteers based on 250 current volunteers).
  - *This supports the strategic objective of growing the volunteer base by 20%, from 250 – 350 volunteers.*
- Decrease operating costs by 5%
  - *This supports the strategic objective of reducing operating costs by 5%.*

Departmental Goals

Now take these annual goals and apply them at the department level. This requires assigning the goal to a specific department. For example, the church goal of increasing weekly attendance by 10% can be delegated to several different departments, but one specific department might be Adult Education.

Example: A departmental goal might look like this.

Department: Adult Education
Department Pastor: Joe Smith
Goal: Increase church attendance by 10% by December 31, 20XX

Objective (goal)	Action Steps	Responsible Person	Team Members	Measured by:	Due Date	Status
Develop Discipleship Programs*	Identify teaching topics.	Pastor Joe Smith	Susan Jones	Completion by due date	March 1	
	Research curriculum.	Susan Jones	Susan Jones	Completion by due date	April 15	
	Identify teachers.	Pastor Joe Smith	Susan Jones	Completion by due date	April 30	
	Schedule classes.	Susan Jones	Susan Jones	Completion by due date	May 15	

*This goal supports the organizational goal of increasing attendance by 10%. It also supports the strategic goal of increasing church attendance to 1500 congregants. Developing discipleship programs was identified by congregant feedback and the hope is that, if the programs are done well, congregants will want to bring people to church for the experience.

To ensure that the departmental goals are accomplished, they need to be delegated to individual employees or volunteers. This is done by mapping the goals and steps the employee needs to take in order to accomplish the goals. As you will note, these goals line up with individual departmental goals. This tool is very valuable during the annual performance appraisal process because it will determine if the organization’s goals, which were set at the beginning of the year, were actually accomplished by the end of the year.

Employee Goals

Now we will take the previous departmental goal and break it down into steps for an employee or volunteer to accomplish.

Example:

Department: Adult Education
Employee: Susan Jones
20XX Annual Goals

Objective (goal)	Action Steps	Responsible Person	Team Members	Measured by:	Due Date	Status
1. Research Discipleship curriculum	1. Benchmark other like churches 2. Internet Research 3. Question pastors and congregation 4. Review ideas with Pastor Smith 5. Order curriculum for class	Susan Jones	Pastor Joe Smith	Accomplished by due date	April 15	In process
2. Schedule Classes	1. Identify available classrooms 2. Schedule Classrooms 3. Advertise Classes in bulletin, website, etc. 4. Register attendees 5. Solicit post-class evaluations 6. Summarize evaluations for Pastor Smith 7. Enter attendees in adult education database	Susan Jones	Pastor Joe Smith	Accomplished by due date	April 30	In process

As you will notice, the objective (goal) for Susan is taken from the action steps in the departmental goal. This allows Pastor Joe Smith to assign responsibility to Susan Jones for accomplishing this goal. This document will be used when Susan is reviewed at her annual performance appraisal, which will demonstrate her goal completion. When Susan completes her goal, it allows Pastor Joe Smith to accomplish his goal which supports the global church goals.

Employee Job Descriptions

Job descriptions should be written to reflect individual goals which support the departmental goals. Job descriptions should describe reporting relationships (this is to identify who the boss is). They should also list day-to-day job duty accountabilities that this person is responsible for doing. Job descriptions should be reviewed and updated annually (the performance appraisal is a good time to do this).

Example:

Church Staff Job Duties and Description
Main Street Community Church
Administrative Assistant
Job Description and Duties

Position Purpose:	To ensure administrative support for Executive Pastor.
Reports to:	Executive Pastor
Salary Range:	$XX,000 - $XX,000

Job Duties:

- Keeps weekly appointment calendar for Executive Pastor.
- Makes all travel arrangements including air, hotel, car and expense reporting process.
- Takes minutes at weekly staff meeting and monthly church council meetings.
- Schedules and organizes all adult discipleship classes. This includes advertising, class handouts and feedback evaluations.
- Tracks adult class attendance and enters information into church database.

As you can see, in the highlighted line above, the responsibility of organizing adult discipleship classes is part of the administrative assistant's job duties description. This provides a direct link between staff members' job duties, their department goals, and, ultimately, the global goals which support the strategic plan.

CHAPTER 3: Performance Management

All church staff should be held accountable for their job duties. Accountability means, “subject to giving an account; answerable.” Goals are only as effective as the person who has responsibility for completing them. When church staffs are not held accountable for achieving objectives, strategic plan implementation can be hindered.

In order for staff to be held accountable for what they are responsible to do, there needs to be a structured performance management process. Performance management is merely communicating expectations and managing the performance of employees. Unfortunately, not all employees have the self motivation to get things done with accuracy and in a timely manner. Anyone who has ever managed people knows that some employees are self starters while others need to be managed.

So what are the tricks to managing staff performance?

Setting Clear Performance Expectations

One of the biggest mistakes managers make is not communicating clear expectations to employees. I’ve counseled countless managers who voice frustrations when employees don’t perform to the desired level. My first question is: How did you communicate expectations to the employee? More times than not the manager admits an informal communication process that does not include a lot of detail.

Communicating Clear Expectations

The manager is responsible for articulating expectations in a goal document and allowing the employee to ask clarifying questions. This should be an open two-way conversation that makes the expectations clear.

As the illustration below suggests, the more time a manager spends with an employee on the front end (orientation to job and clarification of expectations), the less time needs to be spent with the employee on the back end. Clear communication that allows for clarification and questions minimizes issues later in the process.

Monitoring Progress Toward Goals

Once expectations have been shared with the employee, the manager should follow up occasionally and ask the employee how things are going, finding out if there are any questions and if there are any barriers to completing goals. Often, internal systems, processes, and sometimes people hinder an employee's ability to achieve goals. The manager needs to be aware of this so he or she can help remove anything that might be interfering with completing the goal.

Documenting Conversations

So many things compete for a manager's attention, and that sometimes makes it difficult to remember conversations with employees. Creating a structured note-taking process helps ensure there is a history of important staff conversations.

Note-taking is a simple way to document employee performance conversations. There doesn't need to be paragraphs of information, just enough to tickle your memory enough to have a conversation about it. Creating a system that works for you is the best approach. Here is an example of a model I've used.

If you use a planning calendar, you can keep a separate page for each employee in the back. On those pages simply jot down any significant incident or conversation that occurs with that employee. Make the following columns and fill them in after an employee conversation.

- Employee name
- Incident date

- Incident time
- Incident description
- Person(s) involved
- Action taken

Example -Note Taking Log:

Name	Date	Time	Incident Description	Persons Involved	Action Taken
Maggie Jones	January 3	11:00 am	Maggie did a great job by proactively preparing for the staff presentation.	Maggie Jones	Stopped by Maggie's desk and thanked her for taking care of the presentation.
	February 9	9:00 am	Maggie arrived 45 minutes late for work.	Maggie	Stopped by Maggie's desk and reminded her of tardy policy.
	April 6	1:00 pm	Noticed that the quarterly board report had three typos.	Maggie	Pointed out typos and coached Maggie on proofing techniques.
	June 12	6:00 pm	Maggie stayed late without being asked to finish report for John.	Maggie	Thanked Maggie for going above and beyond to finish the report.

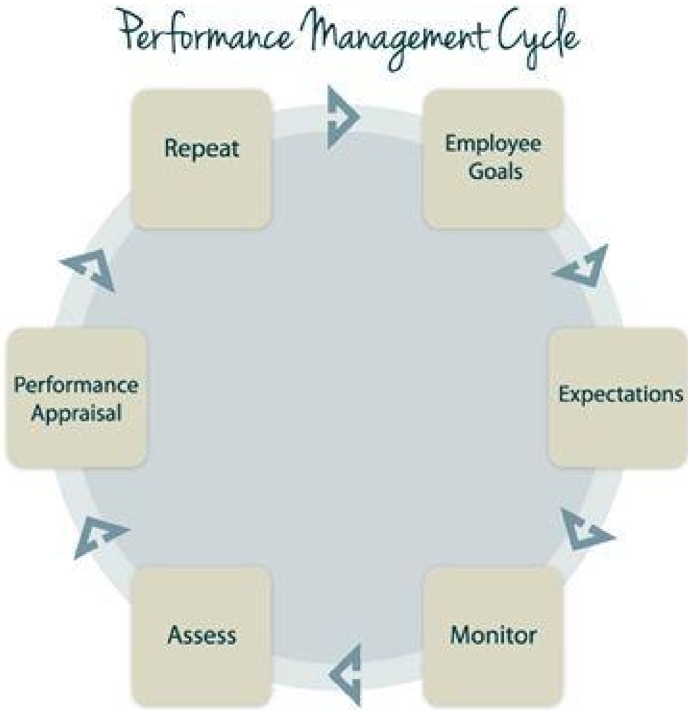
This example log shows how a manager can document employee conversations about both positive and negative behaviors. This demonstrates that the employee is receiving continual feedback that helps the employee better understand his or her behavior boundaries and it reinforces positive behaviors.

This log will also be very helpful when the manager prepares the employee performance appraisal form. All the information on this log will help create an objective performance appraisal for the prior 12 months and it will allow for an honest, objective, factual and unbiased conversation with the employee. This kind of structured annual process works to celebrate employee successes and helps to correct behaviors that may have veered off course.

This approach to note-taking may seem like extra work, but it is well worth the time investment to have lots of data and be prepared for the annual evaluations. Developing employees is one of the most rewarding aspects of managing people, and it is a big responsibility that should not be taken lightly.

The Performance Management Cycle

Creating a structured, predictable cycle for managing performance helps to get things done and supports completion of annual goals.



Expectations

It is important that goals are explained and employees understand what is expected of them. The best way to do this is to have the employee involved in the goal development process. Without employee involvement, buy-in to the goal can be a challenge. Allowing employees to be part of the process gives them the opportunity to voice any concerns about completing the goals. Once the goals are finalized and agreed upon by both employee and manager, the expectations should be laid out very clearly. The manager needs to be sure the expectations are very clear and the employee understands what is expected, when it is expected, and what actions will be taken if the employee misses the agreed-upon deadlines.

Asking the employee to verbalize the agreed-upon expectations is a tactic that can ensure clarity. This will ensure that details don’t get lost in the translation.

Monitoring Goals

The next step in the performance management cycle is to monitor the progress toward goals. A manager should meet with employees on a regular basis (depending on the level of the employee) and talk through progress toward the goals. This constant interaction will give the employee the opportunity to raise concerns about meeting goals, and it allows the manager to help the employee think through resolution to any problem that may be hindering them.

The manager should monitor the employee progress toward goals by assessing the progress of the timeline and providing feedback. This feedback should be constructive in nature, allowing the employee to make adjustments as needed. Doing an assessment on a regular basis (several times a year) eliminates the last-minute gathering of information at performance appraisal time.

Why Do Performance Appraisals?

Churches use the performance appraisal process to help manage employee performance and achievement of ministry goals. It is important to have well trained church managers and a structured process to document church employee performance and give performance appraisals. A well done performance appraisal process can be a positive experience for the employee and help the employee see how he or she contributes to organizational goals. If not done well, the performance appraisal can be a very stressful time and one of the most difficult conversations of the year.

The performance appraisal process should be a time to reflect on the last year and celebrate successes. It should also be used as a time to course correct if an employee has gotten off track. Reinforcing the positive and celebrating the successes can influence future positive behaviors.

Statistics show that an estimated 40% of workers never receive performance evaluations. And for the 60% of the workers who do, most are poorly done. Wow, what a scary thing! The fact is that employees want and need to know if they're doing a good job. A formal performance appraisal process forces managers to communicate both good and bad performance results to the employees.

Goals don't just happen—they need structured systems and processes, and the performance appraisal process is an important part of the cycle.

Example Church Staff Performance Appraisal

The first step in creating an employee performance appraisal form is identifying those things (dimension measures) that the employee will be assessed on. This is done by looking at the values statement and guiding principles as well as those employee characteristics that are important to successful performance. For example, a church value may be teamwork or customer service and it may be identified that successful performance is measured by an employee's ability to work with others, communicate well, or possess certain job skills.

An example of common dimension measures of performance are: Teamwork, communication, attendance, job knowledge and completion of goals. These dimensions should be church-specific and identified globally as part of the strategic planning process.

Each of the measures should have a description that is clear and understandable for the employee. For example:

- **Teamwork:** Employee values team interactions and works effectively with others. Is a team player and helps encourage and orient new team members. Employee is able to balance personal effort and project team effort.
- **Communication:** Employee communicates professionally with others and shares thoughts and ideas appropriately. Listens to others, asks clarifying questions, and controls emotions under pressure.
- **Customer Focus:** Employee understands who his/her customers are and proactively responds to customer needs and adheres to ministry service standards.
- **Attendance and punctuality:** Employee shows up for work at assigned time and provides ample notice when unable to come to work. Uses designated time off forms to request time away from job.
- **Job knowledge:** Employee understands every aspect of job tasks and responsibilities and proactively updates job skills. Employee offers assistance to help others improve skills.
- **Goal completion:** Employee completed annual goals as assigned.

Okay, now let's come up with a scale to measure these dimensions. There are different schools of thought on scaling. Some prefer a five-point scale, but others use a ten-point scale because it is a slightly tighter measure.

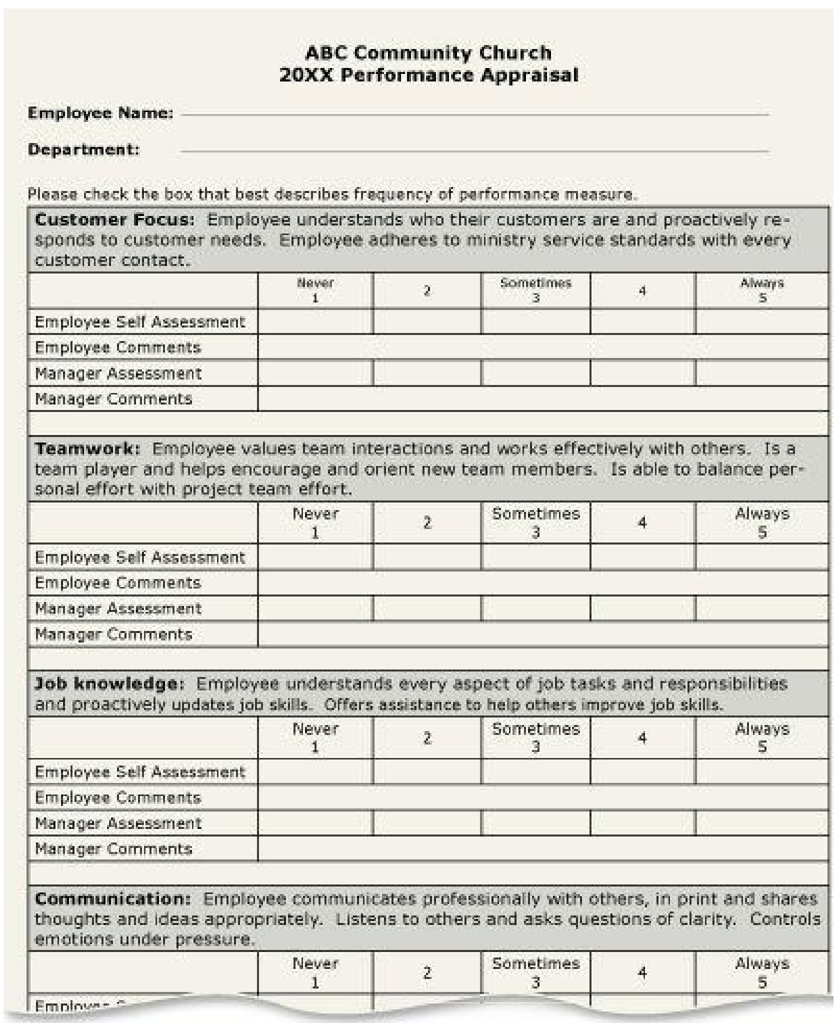
The way you word the description of the measurement dimension is determined by the rating scale.

Common scales are:

- Strongly Disagree – Agree - Strongly Agree
- Never – Sometimes – Always
- Of no importance at all – Moderately Important – Extremely Important
- Dissatisfied – Satisfied – Extremely Satisfied

Ok, now let's create these dimensions on a measurement scale in an example performance appraisal form. This form incorporates both the employee self assessment as well as the manager's assessment of the employee.

Example:



ABC Community Church
20XX Performance Appraisal

Employee Name:

Department:

Please check the box that best describes frequency of performance measure.

Customer Focus: Employee understands who their customers are and proactively responds to customer needs. Employee adheres to ministry service standards with every customer contact.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Teamwork: Employee values team interactions and works effectively with others. Is a team player and helps encourage and orient new team members. Is able to balance personal effort with project team effort.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Job knowledge: Employee understands every aspect of job tasks and responsibilities and proactively updates job skills. Offers assistance to help others improve job skills.

	Never 1	2	Sometimes 3	4	Always 5
Employee Self Assessment					
Employee Comments					
Manager Assessment					
Manager Comments					

Communication: Employee communicates professionally with others, in print and shares thoughts and ideas appropriately. Listens to others and asks questions of clarity. Controls emotions under pressure.

	Never 1	2	Sometimes 3	4	Always 5
[illegible]					

Performance Appraisal Delivery

Since we are all human, it is common for us to make "errors" when assessing employee performance. These errors are reflective of our unconscious biases toward the employee and can give an employee an advantage or disadvantage over others in their peer group.

Rater Errors as described in Human Resource Strategy, by Dreher/Dougherty are reflective of our imperfect judgment of others. It is for this reason that it is important to understand these biases and take them into consideration when preparing a performance appraisal document.

According to Dreher/Dougherty, "A barrier to the accuracy and credibility of performance measures is posed by a number of rater errors, perceptual biases and other sources of distortion in performance ratings." There are six common rater errors that managers make when assessing performance. Understanding what these errors are can help keep managers from falling victim to them.

So what are the six rater errors?

1. Halo Effect

The Halo Effect happens when a rater's overall positive or negative impression of an individual employee leads to rating him or her the same across all rating dimensions. This happens when a manager really likes or dislikes an employee and allows personal feelings about this employee to influence performance ratings.

2. Leniency Error

Leniency error refers to a rater's tendency to rate all employees at the positive end of the scale (positive leniency) or at the low end of the scale (negative leniency). This can happen when a manager over-emphasizes either positive or negative behaviors.

3. Central Tendency Error

Central tendency error refers to the rater's tendency to avoid making extreme judgments of employee performance, resulting in rating all employees in the middle part of a scale. This can happen either when a manager is not comfortable with conflict and avoids low marks to avoid dealing with behavioral issues or when a manager intentionally forces all employees to the middle of the scale.

4. Recency Error

Recency error is the rater’s tendency to allow more recent incidents (either effective or ineffective) of employee behavior to carry too much weight in evaluation of performance over an entire rating period. This can be extreme on both ends of the spectrum. Either an employee is just finishing a major project successfully or an employee may have had a negative incident right before the performance appraisal process and it is on the forefront of the manager’s thoughts about that employee. It is for this reason that it is important to keep accurate records of performance throughout the year to refer back to during performance appraisal time.

5. First Impression Error

First impression error is the rater’s tendency to let his/her first impression of an employee’s performance carry too much weight in evaluation of performance over an entire rating period. An example of this would be a new employee joining the organization and performing at high levels during the honeymoon period and then losing some of that initial momentum as time goes on.

6. Similar-to-me Error

Similar-to-me error means that the rater’s tendency is biased in performance evaluation toward those employees seen as similar to the raters themselves. We can all relate to people who are like us, but we cannot let our ability to relate to someone influence our rating of their employee performance.

The Performance Appraisal Conversation

Preparation for the performance appraisal is ongoing. A manager should always be thinking about the process, and whenever a problem is noticed with an employee’s performance, mention it to the employee and make a note of it. At the same time, whenever an employee demonstrates a desired behavior or result, mention it to the employee and make a note of it.

Performance appraisals need to be: Fair, Pertinent and Comprehensive. All employees should be treated the same, and their behaviors should be tracked and observed the same way. Terminology of observations and documented behaviors should be the same so there are no biases in the process.

Questions to ask yourself when completing the PA form:

- Would I have made the same note on a different employee?
- Are my observations the same or am I over-emphasizing a single event?
- Am I giving immediate feedback after a problem is observed so the employee has a chance to change his/her behaviors and improve?

The appraisal should be pertinent to how the job is performed and relevant to job expectations and standards of work that have been established. It should be comprehensive in monitoring and observing behaviors that tell a story about the employee throughout the entire performance period. All unusual events that affect performance should be documented and filed. It is also important to make note of positive performance and major accomplishments in order to be fair and balanced. The positive notes are important for celebration of successes at the performance appraisal time. Documentation helps you to remember the details of the observation. Use a third party occasionally to review your observations to help keep you focused and objective.

Performance Appraisal Preparation

When it's time to do the performance appraisal, determine what information should and should not be included in the final appraisal. Look for information that shows patterns in behavior. This is not a time to surprise the employee, which is why each time you make a note for the file the employee should be made aware of it.

It is important to block out time on your calendar to write the performance appraisal. A good rule of thumb is to allow at least one hour per employee to review the file, organize content, and write performance appraisals. Take time to write and do an initial draft of the appraisal ahead of the deadline. Sleep on it, and look at the draft again, and test it to make sure it is a comprehensive assessment that is pertinent and fair.

Take time and discuss the employee's performance with the second level supervisor. This will help to assure that you have no biases in your evaluation. Schedule the performance appraisal at an appropriate time and a neutral location. Try to use a conference room, as a manager's office can be intimidating to an employee.

When delivering the performance appraisal, be sure that you will be free of interruptions. Be prepared with specific examples of effective and ineffective performance and be ready to answer questions if asked.

Performance Appraisal Discussion

When you begin the discussion, be sure to state the purpose of the appraisal and the process you will be using for the discussion. Review the appraisal with the employee while probing for additional information, misunderstandings or views that differ from yours. Once the discussion is finished, summarize the performance discussion and have the employee sign the appraisal for the files.

Managers must be willing to commit significant amounts of time to performance management. A lack of clear performance expectation and detailed performance feedback is a major source of stress for employees. It is important to make sure the employee’s job description reflects what is written in his/her goals.

Finally, try to remember that most employees want to do a good job and it is the manager’s responsibility to help them identify their boundaries and goals and to provide them with the necessary resources to accomplish them.

CHAPTER 4: Follow the Leader – Is anyone following?

Leadership

Leadership means “the ability to lead; an act or instance of leading; guidance; direction.” Leadership is about how we behave, communicate and manage others. The term is used in many forms to describe many things, but it is ultimately the act of leading people in a certain direction. It requires followers before someone can be called a leader. Successful professionals demonstrate leadership characteristics while continuing on their own personal development journey. They are life learners and take pride in developing others and watching them grow. Managing a church staff is no different and requires managers and leaders who can influence how work gets accomplished. Strong leaders have certain traits and characteristics that affect their interactions with others.

“Leaders are people who do the right thing; managers are people who do things right.” Warren Bennis

Ten Leadership Traits

1. Person of Influence

Leaders influence others to get things done. They help others see what needs to be done and then show them the path forward. Anyone can be a leader--kids can be leaders. Did your mom ever say, “She’s a bad influence on you”? That means that person influences your thoughts and behaviors. Positive influence is what we’re going for. Leaders often influence us even though we may not be aware of it. The CEO of the hospital I worked for would walk down the hall and pick up trash if he saw it on the floor. This example naturally influenced employees to do the same. It was an unspoken but powerful way to influence others.

2. Big Picture Thinker

Leaders are big picture thinkers and can rise above the day-to-day and see things from a broad perspective. They have the ability to get people excited about where they’re going and how to get there. People often get stuck in their own little corner of the world and need help seeing things from a bird's eye view. Employees need to get out of their cubes and hear stories of how their work impacts those whom the church is reaching. My pastor does a great job of providing employees and volunteers with testimonies of people whose lives the ministry has touched. This shows the person who cleans the bathroom that his or her work helps to impact the lives of others.

3. Believes the Best in People

Effective leaders always give others the benefit of the doubt ("a favorable judgment given in the absence of full evidence") and believe the best in people. A true leader first gathers all the facts before drawing final conclusions. It's amazing how one-sided a situation can look and how very different it seems when you have all the information. My husband always says there are three sides to every story. Make sure you know all the facts before making judgments.

4. Others See Them as Credible

Leaders maintain credibility with those they lead, which means they do what they say, say what they mean, and are able to communicate honestly with others. Others quickly recognize when a leader's actions does not line up with his/her speech. A leader's personal life is consistent with his professional life, and he is unchanged, no matter who is around. There have been so many sad examples of leaders who have fallen when they live double lives and their integrity is not consistent in every area of their lives.

5. Teacher and Mentor

Leaders are gifted teachers and love to help others develop. They model leadership principles and help others to be credible people. They help employees identify growth opportunities and coach others on personal growth. They are not afraid of delegating responsibility and they enjoy seeing others develop. They are not threatened by people who are smarter than they are and they take pleasure in seeing others succeed. I always told my staff that I would know that I did a good job if I could walk out the door one day and know that things would go on as if I were still there. Pulling people up behind us is how we all grow.

6. Master Delegator

Leaders develop others and learn to delegate responsibilities. This is done by allowing others to make mistakes and helping them learn from those mistakes. We learn best from making mistakes, and allowing others to gain knowledge from their own mistakes is an invaluable lesson. All of us have had a starting point in our professional development, and allowing others to learn through experiences helps them grow professionally and gain self confidence.

7. Empowers Others

Leaders empower others and recognize that making front-line decisions and taking risks are part of the development and learning process. People need to be comfortable taking risks, making decisions, and learning from their mistakes. Establishing boundaries and allowing others to test decision-making and problem- solving not only helps with employee development but also takes the bottleneck out of addressing customer issues—whether they are internal (employee to employee) or external (organization to customer). The most important aspect of this is not allowing the employees (or volunteers) to feel like they are hanging out there by themselves. Debriefing after a mistake is made and coaching them to think of what might have been a better approach is part of the learning process. It is very much like parenting: sometimes you need to allow your kids to fall down and pick themselves back up. That is how they learn.

8. Team Players

Leaders are team players and work well with others to get things done. They operate out of a win-win philosophy and help others to collaborate and come to agreement in tasks. They are skilled at managing team dynamics and developing team cohesiveness. They do this by holding team members accountable for their actions and keeping them focused on the team goal.

9. Celebrates Successes

Effective leaders are able to recognize success and help their team celebrate those successes. This is a critical component in team function and development. Rewarding performance and celebrating successes help to keep team members engaged. Even celebrating small successes provides the motivation and fuel to go after the bigger targets. No success is too small to celebrate and can be as simple as a public acknowledgement of success!

10. Have Balanced Priorities

Leaders have a good understanding of their personal priorities and are able to keep all aspects of their lives balanced. They understand the importance of setting personal boundaries and giving family as much focus and attention as their professional responsibilities. They unapologetically recognize that leadership is a marathon and not a sprint, and they understand the importance of pacing themselves so they don't run out of gas before the race is complete. This is difficult to do in today's fast-paced environment, but successful leaders know how to work faster and more efficiently to achieve this balance.

Ethics and Integrity in Business Practice

The success of any ministry is built on the trust of its congregants, volunteers and general public. The best way to gain that trust is to demonstrate ethics and integrity in church operations, not because of legal requirements, but because it is the right thing to do. The integrity of any organization affects all customer groups and every area of business operations which is why incorporating ethics and integrity into the core fabric of the ministry is critical.

"Do the right thing. It will gratify some people and astonish the rest."
Mark Twain

Churches that operate with integrity do so intentionally and make it part of their culture and everyday practices. This culture of honesty and trust helps orient new employees to understand that operating with integrity is "the way things are done around here." Building integrity into the culture is the foundation for ethical practices. Churches that strive to do the right thing benefit by establishing a reputation for high ethical standards. It starts at the top and flows throughout the entire organization.

Accounting Practices

Transparency with finances is a basic expectation of congregants, volunteers and employees. It serves no one when churches mismanage funds, whether it is intentional or accidental. Careless accounting practices limit a ministry's ability to manage its financial resources and can threaten its tax exempt status. Preparing a well thought-out annual budget that supports the strategic plan can help manage and control spending.

Code of Conduct

A Code-of-Conduct Statement is a great way to establish boundaries and set the expectation for employee behaviors. This includes things like conflicts of interest, confidentiality, respect for each other, legal compliance, etc. The church board should determine the boundaries for ethical behavior. Don't be naive enough to think that church employees are exempt from unethical conduct. Having a written code-of-conduct that employees sign when hired helps employees understand expectations for behaviors.

Management Practices

Management practices are the underlying foundation for organizational integrity, whether it is a commitment to serving the members or managing employment practices. A ministry's reputation can be tarnished by unresolved issues and employees observe how leadership responds to issues and follows up on promises made. Employees who trust management are more engaged and supportive of ministry efforts.

Communication

Good communication is critical to the success of any organization but specifically to organizations that are built on the trust and donations of their members. People involved in a ministry have a vested interest in what the organization is doing and how they are performing. Sharing information is a proactive way to keep members informed and engaged.

I didn't know that! – The Process of Communication

The process of communication is important because it sets the expectation for how information is shared. This process should be structured enough that those receiving the communication can reasonably predict how and when information will be received. For example, a new volunteer may receive information about his job assignment any number of ways: via email, postal letter, telephone or church website. Regardless of how he receives the assignment, there should be a defined communication process. Or church members may receive communication about new projects the church is working on, such as adding space to the facilities or creating new staff positions. This kind of information may be communicated at church meetings, by pulpit announcements, in postal letters, or on the church website. The communication process is not as important as its consistency and thoroughness. What doesn't get communicated is at the mercy of the rumor mill and the imagination of others. The secret to effective communication is to answer the questions before they are thought of!

What Gets Communicated

Church congregants, volunteers and employees need to receive lots of information, and they should have a good understanding of what kinds of information they can expect to be shared. The ministry should have defined guidelines for what gets communicated, to whom, how often and in what format. For example, is it standard practice to share information about major church purchases or initiatives during the planning phase, budgeting phase or after all the details are figured out? Regardless, church communications should adhere to pre-established guidelines that are used to steer information sharing. Guidelines should specify what kind of information gets shared, the process for sharing the information, and the timeliness of what is communicated. Consistency in communication helps gain trust and credibility with those whom the church serves. Identifying a communication advocate is the best way to ensure effective information sharing. This person should be responsible for thinking about who needs to know what, when and how.

Two-way Communication

Two-way communication is important because it helps to minimize misunderstandings and it helps to engage others. When people are allowed to ask clarifying questions, it helps to resolve issues and it opens the door for better understanding and buy-in. This kind of communication can be done on a one-on-one basis, in large group open-forum settings, or electronically via the website or other feedback tools. It is important for processes to be developed to encourage two-way communication with the congregation, volunteers and employees.

Leadership is all about the “process” of leading others. This includes the way information is shared, how well others are communicated with, and how well the vision is kept in front of the people.

CHAPTER 5: We can fix that! A Quality Approach to Problem-Solving and Decision-Making

Decision Making

Managing church operations presents many challenges and calls for daily decisions. Decisions need to have a structured process to ensure that all decisions are made in a consistent, unbiased and principled manner.

The responsibility of church leadership is to accomplish those things that are dictated through strategy and goals. I'm not a particularly avid football fan, but I do know that the goal of the entire football game is for the team to get the ball to the end zone. There is a lot of strategy and effort that goes into the process, but at the end of the day, scoring touchdowns is all that matters. Similarly with leadership, accomplishing goals is their responsibility, and the way they manage their team determines how well their team accomplishes goals and how well the leadership allows them to get the ball into the end zone.

Use the vision as the guide.

The beauty of developing a mission, vision and values statement is that it provides the framework for decision-making. All high level decisions should be filtered through the mission and vision, and the question should be asked: "Does this line up with our mission, vision and values?" The second question should be: "Do we have or can we solicit the resources needed for this?"

Just give me the paint colors!

Decisions are often held up because of a bottleneck in the hierarchy and the decision-making process. This happens when decisions that need to be made are stuck at a decision point. This is typically a decision that only one person can make and the hesitation in making that decision holds ups the entire process. Here's an example: A decision has been made to paint the interior walls of the offices. The painting team is ready to go but is waiting on the decision regarding the paint colors. The goal is to paint the offices before the office open house in January, but the team assigned to paint is held up waiting on the colors to be picked. In this example, a goal is delayed by no fault of the team but by the person who is responsible for choosing the color. A solution to this example would be for the facility review council to create a palate of approved colors that the painting team could be empowered to choose a color from. This is an example of creating systems and processes to speed up the process and empower employees to make decisions that help achieve objectives.

Please don't take my band-aid off!

Difficult Decisions

Making difficult decisions is inevitable, and sometimes those decisions are painful because they impact the lives of others. It may be a decision to end the relationship with a vendor who is not delivering what was promised. Perhaps this vendor just happens to be a church member or an employee who is not fulfilling her job responsibilities and needs to be terminated, but her entire extended family attends the church. Perhaps a longtime volunteer has been caught doing an illegal activity and needs to be asked to step down from a key leadership position. Regardless, these kinds of issues come up in church life, and leadership needs to be able to address the issues and make the tough decisions.

Sometimes difficult decisions have an impact on the entire church and the way the decision is made and communicated can have a global impact. For example, if the church is experiencing rapid growth and new leadership is needed to take the church to the next level, the difficult decision of changing leadership is made. Acting on that decision quickly or slowly can impact those who are impacted by that decision. When faced with these kinds of decisions, I always ask this question: "Do you like to take a band-aid off slowly or quickly?" Acting on a decision quickly can create a lot of sudden pain, but the pain is adjusted to quickly and it will go away. Another approach is to take the band-aid off slowly. This approach takes a little more time, is less painful, and can be adjusted more slowly—but it is still painful. Either approach has its advantages and disadvantages. The question is what is the best approach for any particular situation?

> *"To let people languish in uncertainty for months or years when in the end they aren't going to make it anyway is ruthless. To deal with it up front and let people get on with their lives is rigorous" Jim Collins – Good-to-Great*

Problem-Solving Tools

Problems. It sometimes seems as if we solve one problem and another one pops up right behind it. Why? Because fixing a problem creates new problems! Think about these examples:

Scenario Problem: A church of 1000 members creates strategies and sets goals to increase membership by 50%.

They are successful with their endeavors and now they have a new problem: not enough seating for the new members and not enough children's ministry space for the increased number of kids.

New problem: We need more space.

The team puts together a recommendation to add another service to take the stress off of one weekly service. A second service begins. Problem solved.

New problem: We need more volunteers to man the second service.

As you can see, those who manage any type of organization are paid to solve problems. The tools they use can vary from gut instincts to structured problem-solving tools. Skilled managers are good problem-solvers and use problem-solving tools to help them find the best solutions.

"You have to be smarter than the problem." John Stiffler

Any organization that is growing is constantly solving one problem that creates a new problem to be solved. Having problems to solve is not necessarily a bad thing but the solutions are best when they are part of an established problem-solving process.

The secret is having a structured problem-solving process – this is called total quality management. Quality concepts provide problem-solving tools that can help identify problems and provide ways to solve problems.

"Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction and skillful execution; it represents the wise choice of many alternatives." William Foster

Quality tools are used by organizations to solve problems and monitor and manage improvement initiatives. There are several types of tools used, but here we'll talk about the most common ones. Different tools are used for solving different problems, and many of the tools can be used in different ways.

The trick is to become familiar with and comfortable with all the quality management tools so that you can pull the appropriate one out of your toolbox when there is a problem to solve.

5 Whys

One quality problem-solving tool is called the “5 Whys.” This is an exercise that can quickly drill down to the root cause of a problem. It is tempting to jump to the first conclusion when trying to drill down and solve a problem so it is important to make sure that what is thought to be the root of the problem truly is. Let’s look at this example.

> **Problem: Children’s ministry has to turn away children because there are not enough workers to comply with teacher-to-student ratios.**

Let’s look at this problem and ask the question why five times.

1. Why? The first answer might be: All of the scheduled workers do not always show up for their shifts.
2. Why? When calling the workers who did not show up for their shifts, a few answered, “I didn’t know I was scheduled.”
3. Why? Workers didn’t receive their monthly schedule in the mail.
4. Why? Workers were on the mailing list and their schedules were mailed, but they didn’t receive the mail.
5. Why? Workers moved but didn’t notify the office of address changes.

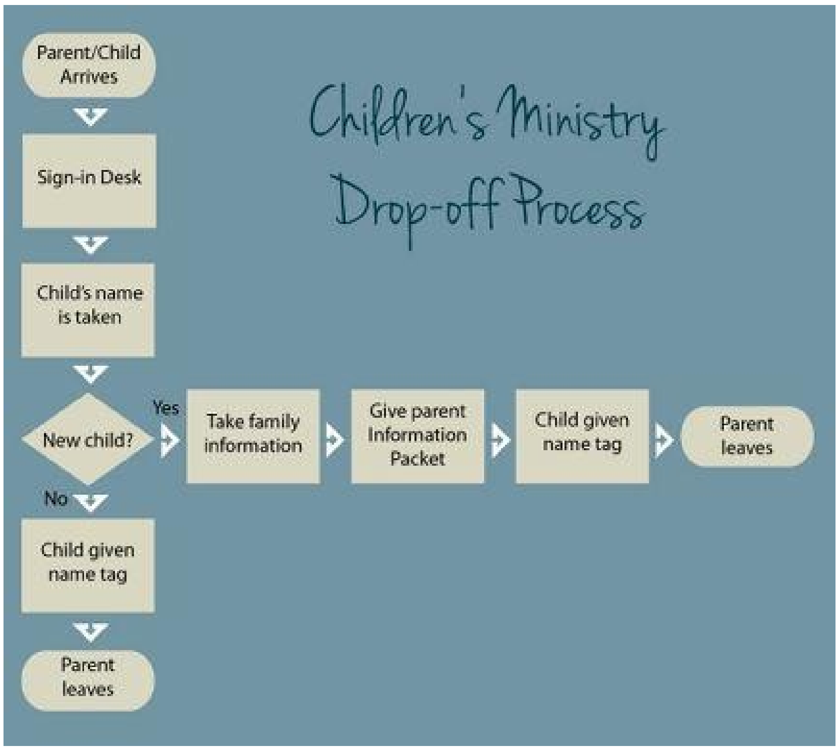
Now if you look at the answer to the first “why” and stop there, you may have the tendency to lay blame on the workers and jump to the conclusion that these workers are irresponsible and unreliable. But as you dig down into the fourth and fifth time you ask the question why, you will see a clearer picture of the issue that needs to be addressed.

Here’s one of my favorite quality quotes: ***“It’s not about the people, it’s about the process.”*** If you put good people in bad processes, the outcomes don’t improve. When problems arise, it is human nature to try to find the culprit and lay blame on someone, but more times than not the person is working in a broken process that limits his or her ability to perform well.

Let’s look at another example. Imagine that you have a receptionist and you are constantly getting complaints about the fact that she doesn't know the answers to callers' questions and she continues to transfer callers to the wrong person or wrong department. You can discipline that employee or you can try to learn what in the process is not working. Is this happening because there is not a structured training process? Is it because the receptionist is not getting the information she needs? Going through the 5 Whys could flush out reasons and possible solutions to this problem. Once you separate the person from the problem, you can drill down on the causes and fix the process that will ultimately help the person perform their duties.

Flowchart

Most of us are familiar with flowcharts. You have seen flowcharts of reporting relationships in organizational structures. Flowcharts are also used to document process flows. This tool is used when trying to figure out bottlenecks or breakdowns in current processes. Flowcharting the steps of a process gives a picture of what the process looks like and can shed light on issues within the process. Flowcharts are also used to show changes in processes when improvements are made or to show a new work flow process.



Check Sheet

A check sheet is a basic quality tool used to collect data. A check sheet might be used to track the number of times a certain incident happens. As an example, a large church that schedules hundreds of volunteers to serve at every church service may track the number of times volunteers don't show up for scheduled shifts. This check sheet would total the number of times a volunteer doesn't report as scheduled as compared to the reasons for the volunteer not showing up.

Check Sheet

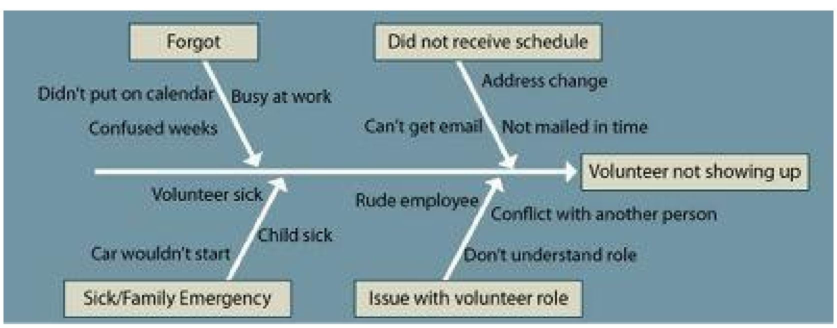
Date: May 10, 20XX

Problem: Volunteer not showing up as scheduled.

Reason	Number of Volunteers	Subtotal
Did not receive schedule	///// ///// /////	15
Forgot	///// ///	8
Sick/Family Emergency	///// ///// ///// //	17
Issue with volunteer role	///// ///	8
Other	///// //	7
	Grand Totals	55

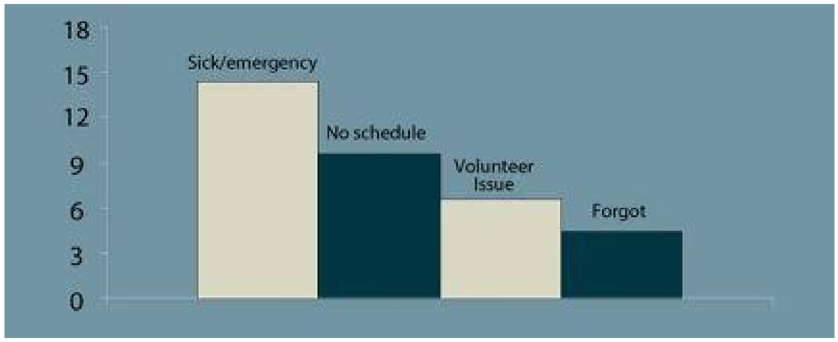
Cause and Effect Diagram

A cause and effect diagram, also known as a fishbone diagram, shows the different causes of a problem. The problem is identified and written in the box (head of the fish) to the right. There is then a spine of the fish, and then off the spine are major causes of the problem. Causes are typically put into categories of people, processes, materials, and equipment. Causes are identified by brainstorming with a group familiar with the problem. Once all causes are identified, they can be used to develop an improvement plan to help resolve the identified problem.



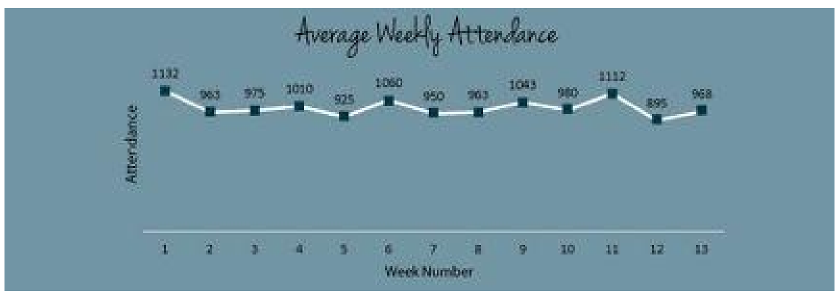
Pareto Chart

A pareto chart is a bar graph of data showing largest number of frequencies to the smallest. When looked at from largest to the smallest occurrences, it is an easy picture to see how to prioritize improvement efforts. The most significant problems stand out and can be targeted first.



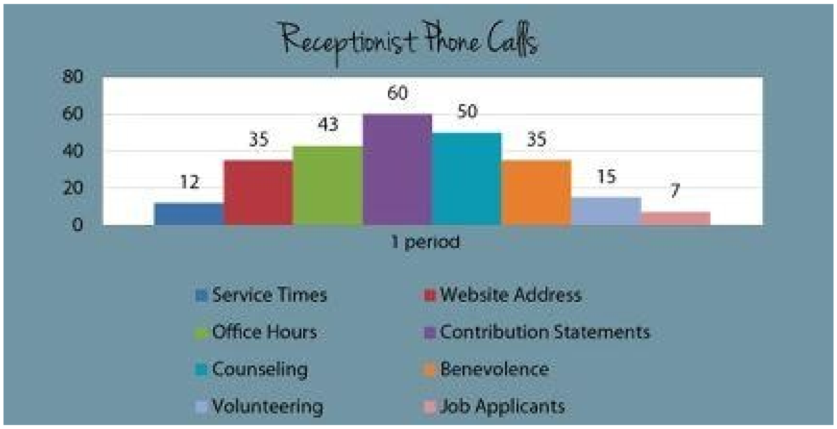
Control Charts

Control charts or run charts plot data points on a line over time and give a picture of data movement. It demonstrates when data is consistent or when there are high or low outliers in occurrences of data. It focuses on monitoring performance over time by looking at variations in data points. It distinguishes between common cause and special cause variations. The Dow Jones Industrial Average is a good example of a control chart.



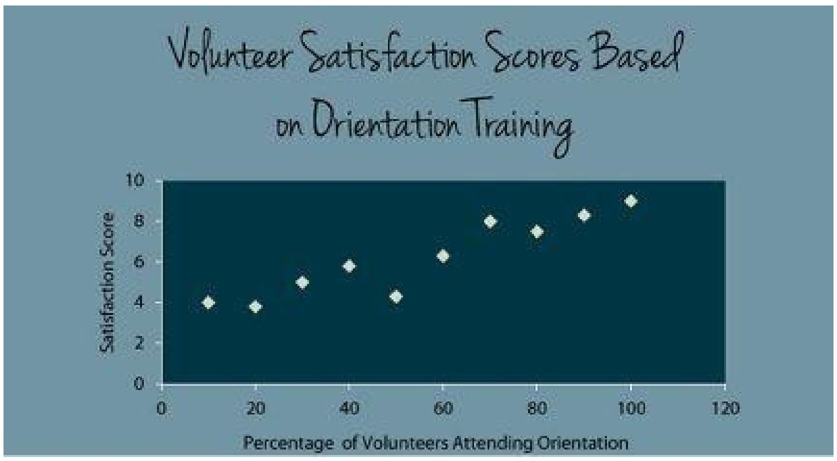
Histograms

A histogram is a bar chart picture that shows patterns in data that fall within typical process conditions. Changes in a process should trigger new collection of data. For example, the histogram below shows the highest volumes of phone calls are asking about contribution statements. This is a seasonal high number that should redistribute over time. A minimum of 50-75 data points should be gathered to ensure an adequate number of data points have been collected. This could mean collecting data on phone calls over several weeks or even months. The patterns that are detected demonstrate an analysis that helps understand variation and provides information that could be used to improve an internal communication process.



Scatter diagrams

Scatter diagrams are graphs that show relationship between variables. Variables often represent possible causes and effect. As an example, a scatter might show how volunteer training affects volunteer satisfaction scores. This diagram shows the relationship between the percentage of volunteers going through a formal orientation process and volunteer satisfaction scores.



Each tool has advantages for certain situations and not all tools are used for all problem solving. Once a tool is learned, it can be adapted to different problem-solving opportunities. As with anything else, using tools properly takes time, practice and experience.

How Can FOCUS PDCA Help Improve Church Operations?

Improving what we do and how we do it is an important part of operational strategy. As churches develop and grow, improvement opportunities will present themselves along the way. Opportunities can be related to business processes like the accounting function, a children's ministry check-in process or a volunteer orientation process aimed to improve the customer experience. No matter what the process is, there can be a systematic approach to making improvements.

A quality method for improving work processes is a model called FOCUS PDCA. This methodology takes a process through identification of the improvement opportunity, planning for an improvement, and implementation and evaluation of the change.

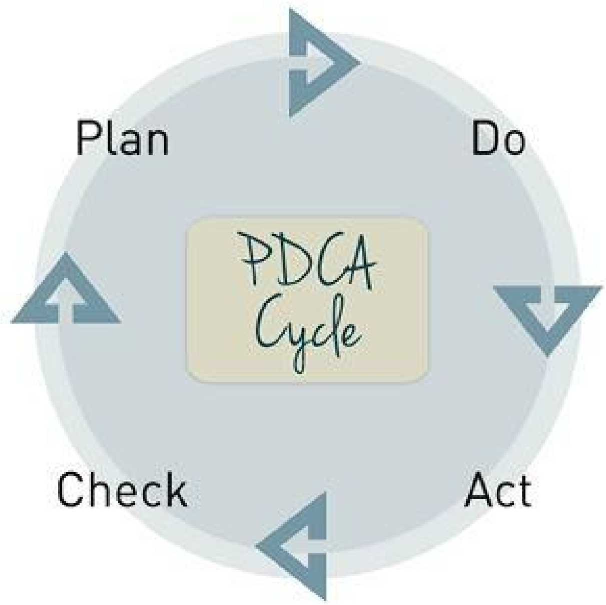
The first step in any improvement is to understand the current process by establishing a baseline. A baseline is measurable data that is collected at the beginning of an improvement project. For example, if you want to improve the length of the volunteer application process, it is important to measure what the current application process time is. Once you know what the current process time is, you can identify those things that slow the process down and then develop systems to improve those times. Measurement of any improvement effort is done at the beginning, during and after any improvement effort.

So how does FOCUS PDCA Work?

FOCUS PDCA is an acronym for:

- Find: An opportunity for improvement.
- Organize: A team that is familiar with the process.
- Clarify: Understanding of the process.
- Understand: Variation in the process.
- Select: What needs to be improved.
- Plan: Develop an improvement plan.
- Do: Execute the plan.
- Check: Review the results and determine if the plan worked.
- Act: If the plan worked, standardize the change and write policy. If the plan did not work, go back and try something else.

Let's look at an example of how this might work. Say you are a church that processes dozens of volunteer applications every month. There have been increasing numbers of complaints about the length of time it takes to process, approve and place volunteers. The church has been growing, but you are concerned that the complaints will have an impact on future volunteer interest. Let's use this example and go through the FOCUS PDCA Cycle:



- Find: The opportunity to improve is in the volunteer application process.
- Organize: Recruit a team of employees who oversee volunteers and manage the
  volunteer application process.
- Clarify: Map out the volunteer application process in a flowchart. Start with the point at which the application is received and map the process through volunteer placement.
- Understand: Collect data so you understand any variations in the process.
- Select: Identify what in the process can be improved.
- Plan:Develop an improvement plan.
- Do: Implement the plan.
- Check: Collect data to see how the plan worked.
- Act: If the plan worked, write a policy and train employees on the new process. If the plan did not work, go back to the beginning and try another improvement idea.

This is a very simplified example of using FOCUS PDCA, but what you will find is that if you try this method on a few small improvement opportunities, you will become more comfortable and will be able to use the same methodology on larger system problems.

Guiding Councils

In Jim Collins' book, Good-to-Great, he talks about using councils to help guide the organization. Councils should be made up of a group of the right people to discuss, debate, and make decisions about the operation of the organization. People selected to serve on councils should be those with knowledge, experience and a passion for the topic. These knowledge experts should be steered by the board and used to facilitate a decision-making process that benefits the church.

Councils should have a charter, and someone should be assigned to facilitate the process. This facilitator should help the council identify a team, create a team charter, ground rules and team goals. By going through this process, the team has some accountability and a set direction.

Councils should meet regularly and report to the church board.

Examples of Church Councils:

Budget Review

The budget review council should be assigned to meet monthly to review monthly budget numbers, analyze budget variances and approve non-budget expenditures. This group is also responsible for meeting with church managers and creating the annual budget. The budgeting process forecasts annual revenues, fixed and flexible spending, and anticipates and budgets for large capital expenses. This group is the financial think-tank and has an identified representative that reports to the board of directors.

Human Resource Council

The human resource council helps to ensure that policies, procedures and processes are in place to support staff and volunteers and that the ministry complies with and operates within state and federal laws. An HR council might also have responsibility to review job applications and approve applicants for the first round of interviews.

The HR Council should also help to establish employee pay grades, make decisions on employee benefits, employee policies, training, tuition reimbursement, leadership development, job classifications, employee assistance programs, vacation approval process, reward and recognition, and performance management.

Facility Review Council

The facility review council should meet on a regular basis and discuss strategy for maintaining the current facility, identifying facility update needs, and plan for future expansions or remodels.

This group also facilitates the process of ensuring that staff work areas meet employee job requirements and gives direction on standard furniture, décor colors, campus way-finding, and mechanical equipment needs. This council meets with the budget review committee to ensure large capital expenditures are budgeted and resources are available when needed.

Information Technology

The information technology council is responsible for making sure the church has the necessary technology to run its operations. This may include recommending purchases of audio visual equipment for church services and computer software to operate children's ministry or assessing whether employees have the right computer equipment and software to perform their job duties.

This council also researches new technologies and ensures the church is using all available technologies that would facilitate streamlined work processes. For example, investing in electronic scanning systems for children's ministry and adult classes can eliminate the need to manually input attendance information into the church database.

This council is also responsible for establishing ministry guidelines for replacing computers, setting guidelines for Internet usage, training employees in proper email etiquette, communicating policies on employee personal use of church equipment, and establishing any other information technology parameters.

Safety Council

A safety council is responsible for ensuring the church provides a safe environment for visitors and employees. This is done by reviewing safety procedures for potentially dangerous activities by employees and volunteers. This group should make routine campus rounds and proactively look for hazards that need to be corrected. This could be anything within buildings or outside grounds. Things like electrical systems, walking surfaces, air quality, fire extinguishers, clutter in hallways, etc. Making a point of looking for things that could pose a threat of harm to employees or visitors can help to avoid an unnecessary incident of injury.

Customer Experience Council

A customer experience council is responsible for seeking feedback from all customer groups—congregant, volunteers and employees—and identifying ways to improve the experience. This council may be responsible for facilitating a formal feedback process, reviewing feedback data, and developing improvement plans based on that data. For example, this group may find that volunteers are asking for a more structured training process because they don't feel adequately trained to perform their job duties.

Guiding councils may charter teams to help improve their systems and process and work on improvement efforts. Successful teams are driven by directives of the organization and are steered by a team charter.

According to www.highperformanceteams.org , a team charter statement is "a written document that defines the team's mission, scope of operation, objectives, time frame and consequences."

Spending the time to develop a team charter and purpose statement can help ensure team support and resource availability. A charter helps clarify support and resource allocation from management. This formal document legitimizes the team's efforts and supports the team so they can accomplish what they are charged to do.

A team charter document should include:

Purpose Statement

The purpose statement explains why a team exists and how its charge lines up with the global goals of the organization. For example, "The purpose of the Customer Experience Council is to improve customer satisfaction scores for Regional Community Church."

Mission Statement

A mission statement clarifies the team's responsibility. For example, "The mission of the Budget Review Council is to ensure proper management and control of church financial resources."

Scope of Operation

The scope of the operation details the boundaries and parameters that the team operates within. For example, "The Human Resource Council will research and make recommendations on hiring, firing, and compensation and benefits for church employees according to best practice benchmarks and within legal and tax compliance."

Team Objectives

The objectives of a team should be tied to measurable results. These objectives should be able to demonstrate the effectiveness of the team. For example, "The Budget Review Council will control church expenditures and maintain a 5% profit margin."

Time Frame

The time frame for any team project should be clearly defined so the team understands the deadlines and urgency for completing its commission. For example, "The Facility Review Council will ensure all church facilities are maintained with appropriate updates on an annual basis."

Consequences

Chartered teams use organization resources, and the team should be held accountable for producing the results outlined in the team charter. There should be very specific accountability outlined in the document so that members understand the importance of their commitment to the council.

It is important for newly chartered councils to understand why the group exists, what they are charged to do, the time frame in which they need to accomplish the tasks and be accountable for meeting team objectives. This very clear communication and process on the front end of a team launch can help prevent miscommunication issues.

CHAPTER 6: This Is God's Money!

Budgeting

God blesses churches with tithing members to provide the resources to do the work of the ministry. Good stewardship of those resources is a responsibility that should not be taken lightly.

Churches that use an operating budget are equipped to control spending, and budgeting toward the vision should always be the goal. Formalizing the budgeting process can help ensure that dollars are allocated to those things that help move the organization forward.

Surprisingly, many organizations don't operate with a budget because they question the value of taking the time to prepare and monitor the budget.

Reasons to Budget

1. Achieving objectives is no accident, and it takes a plan supported by budget dollars to achieve strategy.

2. The budgeting process forces organizational planning and goal setting and creates a structured process for funding church-wide initiatives and objectives.

3. When goals and objectives are budgeted, they can be used as tools to evaluate performance.

4. Budgeting helps to facilitate strategic plan implementation by allocating resources to strategic priorities.

5. Budgeting eliminates turf wars over spending and available resources.

6. Budgeting improves communication throughout the organization because everyone understands what the priorities are and what resources are allocated to each department.

Budgets are used for both planning and control. Planning requires high level decisions about priorities that line up with strategy, while controlling ensures that management implements what was planned and achieves objectives. Planning is futile without control over spending, and without planning there are no targeted objectives to achieve.

Budgets set targets for revenues and spending and establish a plan for how the church will achieve its short term and long term strategy. The budgeting process makes estimates of revenues, plans expenditures, and restricts spending that is not part of the plan.

Operating budgets extend out for one year and are divided into four quarters. The quarters are then divided into months and the budget is viewed on a monthly basis to review gains, losses and variances.

Manager performance is based on how well the manager handles his/her department budget, and the manager is held accountable for variances between the budget and actual results. Budget costs are organized and controlled by the different levels of management. Budget allocation is based on historical performance and strategic priorities.

Having a formal and structured budgeting process is the foundation for good stewardship. Very similar to our personal finances, discipline and planning are cornerstones of a church budgeting process.

As with most things in managing a church, budgeting needs to be driven by the vision of the organization and the strategic plan. Churches that stay focused on their strategy and plan know exactly where they want to spend their resources and have a plan to help keep them from spending in areas that do not line up with the vision. For example: Does spending $100,000 on a new sound system for the church auditorium line up with church strategy? How would your church answer this question?

So what are the steps to church budgeting?

The budgeting process

The budget review committee establishes the global budget with revenue projections and allocates dollars to individual departments. The individual department managers who are responsible for creating their own budget need estimates based on goals and allocated resources.

Allowing individual department managers to prepare their own budget estimates makes them more accountable, accurate and reliable. The advantage to this approach is working managers are more apt to follow their own budgets because they created the budget and understand the reasoning behind it as opposed to a budget handed down to them from above. This adds a layer of accountability in that the manager has no one else to blame for failing to meet their own budget requirements.

Once these budgets are prepared, they are submitted to the next level of management for review and approval. Top management sets strategy and goals, and then managers and supervisors estimate budget requirements that are needed to accomplish strategy. The budget is established and sent back up the ladder for review and is negotiated back and forth until a final budget is approved.

Department managers are often caught in the middle and many express these common concerns with budgets:

- If I don’t spend all the budgeted dollars this year, will I lose that money next year? For example, facilities has $10,000 budgeted for snow removal but only used $7,500 because of a mild winter. Should facilities be given $10,000 for the budget next year?
- If I overspend my budget, will it be reflected on my performance appraisal? For example, a severe winter caused the snow removal budget to be overspent by $15,000. Is the facilities manager responsible for this variance?
- I don’t want budget restraints to impact employees, customers or improvement efforts. For example, if the scanning system for children’s ministry check-in breaks and there are no dollars in the budget to replace it, the employees’ and parents’ experience would be affected. Is this an acceptable variance?
- If there is too much focus on budget control it can take the focus off of nonfinancial goals and targets. For example, if the children’s ministry manager is more concerned with controlling spending than making sure her department meets the needs of the parents (customer), the priority to have positive customer response from parents may be challenged. There needs to be a balance.

Strategic Plan

Having a well-thought-out strategic plan that supports the church vision is the first step in any budgeting process. Church resources should be used to implement strategy and develop the ministry, and budgeted dollars are used to make it happen.

Church Goals

Developing goals is the next step in the budgeting process. A well-thought-out strategic plan generates annual church goals that need to be funded by the budget. Accountability for achieving goals is the responsibility of the church board or governing body.

Revenue Projections

Revenue projections should be based on historical financial performance as well as projected church growth income. The projected growth may be tied to organizational goals and planned initiatives that will initiate business growth. For example, if a goal is to increase contributions by 10%, those contribution projections should be part of the revenue forecast for the year. Additionally, if your congregation has been affected by the economic downturn, it may be wise to be conservative with projections. The last thing a church needs is to fall short of a forecast and not be able to meet budget requirements.

Fixed Cost Projections

Projecting fixed costs is simply a matter of looking at the monthly predictable costs that do not change—things like employee compensation costs, mortgage or rent payments, insurance costs, etc. Fixed costs do not change and are minimum monthly expenses that need to be funded in the budget. For example, if there are open staff positions, the cost to fill those positions should be part of fixed cost projections. Fixed costs are the most controllable and predictable expenses, but they need to be managed and consistently reviewed for cost-saving opportunities.

Variable Cost Projections

Variable costs are the expenses that fluctuate from month to month. Things like supply costs, travel, utilities and overtime operating expenses are all examples of variable expenses. These are expenses that should be budgeted and controlled, but sometimes things happen that are beyond anyone's control. An example of this would be snow removal costs in an extreme winter when the normal cost is doubled. A good way to control variable costs is to put monthly limits on things like travel, supply costs or overtime and hold managers accountable to stay within the set limits.

Annual Goal Expenses

Any project or program that is part of an outlined strategy should also be given a budget. Each initiative should have projected costs associated with the goals that should be managed like any other budget line item. This is where the cost of implementing goals is incorporated into the annual budget. Projections of costs should be identified, laid out and incorporated into the departmental budget that is responsible for that goal. For example, if the church is strategically targeting young families, there may be a goal to develop a young married couple's ministry. This would require funding to plan, staff and market the initiative—and this requires budget dollars.

Target Profit Margin

Every organization, whether it is a for-profit or not-for-profit, should have a targeted profit margin. Not-for-profit organizations use profit margins to reinvest back into the facilities and development of the organization. Profits are important for any and all organizations. Healthy profit margins are a strong indicator of the strength of an organization and help fund new programs and facilities. A profit margin also acts as a buffer if revenue projections fall short.

Board Approval

The governing board should approve the budget and monitor budget performance. The budget review committee is responsible for reviewing monthly financial statements to monitor budget performance, become familiar with all expenditures and safeguard the organization against misappropriation of funds. It's counter-intuitive to think there could be fraudulent activity in a church setting, but don't be naive to the possibility. The more people there are to oversee and challenge the budgeting process, the stronger the bottom line becomes.

Budget Review

The budget review council should meet monthly to monitor performance against goals, review budget variances, and assess issues associated with budget variances. It is important to do this every month so there can be a correction to overspending or a modification to the budget if needed. This includes monitoring revenue projections as compared to cost. Waiting until the end of the year to make corrections could negatively affect the final budget outcome.

How to Deal With Variances

Variances should be reviewed with the responsible department manager, and questions should be raised as to what caused the variance. Sometimes unforeseen situations arise that cannot be avoided, so it is also important to have a budgeted emergency fund to help with those unplanned expenditures. For example, if the HVAC system suddenly goes down and needs to be replaced, this would be a justified budget variance. However, a manager's overspending on unnecessary high-tech equipment may not be a justifiable variance.

Structured budgeting processes can help develop and advance a ministry, while sloppy budgeting can blindside a church and affect the long-term viability of the ministry. When finances are allowed to get out of control, it creates the necessity to take drastic measures to get things back on track. And that's not something anyone in leadership wants to do.

Without tithing congregants there are no revenues to budget. For this reason, strategic plans and budgets should be targeted at one thing and one thing only: the customers. This is why it is imperative to identify the donors, find out what they want (within the mission and vision of the church) and put systems and processes in place to meet their needs.

Budgeting and allocating resources can be a very challenging task. There are a number of things that compete for budgeted dollars, which can make the processes overwhelming and difficult to prioritize. Having a good prioritization model for budget decision-making can take some of the guesswork out of such decisions.

Department managers often get requests for the newest software, the newest phones and gadgets, the most recent model of office equipment, etc. Without a streamlined process to prioritize decisions, managers can end up wasting valuable budget dollars on things that don't add value or advance the organization.

So what are some things a manager needs to consider when making a budgetary decision?

1. All spending and budgeting decisions should be based on a simple decision model by asking these questions. Is this expenditure a:

- ***Want*** – something that would make the job easier;
- ***Need*** – something that is important to get the job accomplished;
- ***Have-to-Have*** – something that is necessary for the success of the operation.

For example, a new version of a software program is available. The question that should be asked is this: "Is this something we want, we need or we have-to-have?" Most likely, the purchase can probably wait even though it may make the job easier. However, if the copy machine goes down and putting together hand-outs for Children's Ministry is part of the daily operation, this request would fall into the have-to-have category. This is an expenditure that affects the success of the operation, so the resources need to be available.

2. Are there budget dollars available to spend? As part of the budgeting process, dollars should be budgeted specifically for emergency expenditures that would cover the have-to-have spending decisions. If there are not budgeted dollars available, are there other budgets that could be modified to free up available dollars? For example, if there are dollars allocated for a special event, are there ways to cut some of those costs so some of those dollars can be put toward something else or are there overtime hours budgeted that can be controlled to free up resources for something else?

3. Does the spending line up with church goals and ultimately will the spending get the ministry closer to the vision? For example, a conference comes up that is not budgeted. The question to ask is, "Will this conference help better equip the staff for completion of departmental goals?" If not, even if dollars are available, they probably should not be spent.

As managers, we are faced with spending decisions every day, and unless we have a good foundation for decision-making, we can easily overspend budget dollars.

Managing a budget is a skill that all managers need to learn. Part of that skill is having a good understanding of where the organization is going so that all spending decisions are made in accordance with the vision and strategic plan.

CHAPTER 7: Paid Labor

Hiring Staff

Managing the human resource function of a church is every bit as challenging as managing people in any other business setting. A church is only as strong as the people it employs, and weak employees can affect the ability of the church to flourish and meet objectives. As Jim Collins states in Good-to-Great:

"Get the right people on the bus, the wrong people off the bus, the right people in the right seats and then figure out where to drive."

Employing the right people requires a great strategy to recruit, screen, interview, orient and train new employees. Each step of the hiring process can affect the ability to select the right candidate so a structured process and consistency in practice is important.

Employee Recruitment

It requires focused strategy to recruit the best and brightest for the ministry.

Recruiting a church employee can be a challenge because of the political aspect of hiring someone from within the congregation. There needs to be a structured recruitment and screening process coupled with great communication to avoid the inevitable offense that comes when congregants apply to work for their church and don't get hired. Good communication coupled with a great interview process is the best way to guard against this. Recruiting outside the congregation can increase the talent pool, but it may be more difficult to find someone who supports the mission of the church, which should be a requirement for every church employee.

The HR Council should set guidelines for how recruitment is managed and determine if the church should focus on hiring from within the congregation or use outside resources to identify the right person for the job. There are different schools of thought on this, which is why a church leadership group should discuss pros and cons of each method and then determine the best approach.

Hiring Process

The HR Council is also responsible for creating a hiring process that includes recruitment strategies, interviews, testing, background checks, orientation and job training. It is important to have a structured and streamlined process to ensure new employees are screened for the best fit. It is far better to delay a hiring decision than to hire the wrong person—no matter how desperate the need is to fill the position!

The hiring process should be streamlined with a structured communication process for job applicants. Applicants should be considered a customer group and be given the courtesy of consistent and clear communication. Anticipating the kind of information a job applicant might need and building a process around that is the best approach. For example, when someone applies for a job, there should be an acknowledgement letter sent immediately to let the applicant know that the application was received. Communication should be made with the applicant at three critical steps in the process:

1. When the application is received;

2. When an interview is scheduled;

3. When the position is filled—whether the applicant got the job or not.

It is common courtesy to let applicants know that they are no longer in the running for the job, which also helps to avoid awkward follow-up phone calls.

Part of the communication should be setting the expectations for when the applicant might hear back. For instance, if it is common for applications to be reviewed by several people before an interview is scheduled and that process typically takes weeks or even months, let the applicant know so that there is a realistic expectation for when he or she might hear about the job. And if things change and the process is expected to take a little longer, another courtesy communication should be made to the applicant. Always err on the side of too much communication. Just think about what kind of information you would appreciate if you were the applicant—and then act on it.

Screening

Getting to know some things about a potential employee before bringing that person onboard is an important step and requires running background checks and calling references. Every organization should have an identified vendor to run background checks. Running background checks is no longer a luxury but a necessity in the hiring process. This is especially true for church staff that may have access to children. Most insurance companies can refer you to a reputable organization that does this kind of screening.

Checking personal references is another great way to find out information about a potential employee. Verifying the reference's relationship with the candidate and asking some general questions can flush out valuable information. Taking the time to make these kinds of phone calls can help ensure the candidate is the right fit for the organization.

Interviewing

One-on-one interviews are the best way to really get to know a candidate. Add that to good preparation and targeted questions and you are well on your way to determining if the candidate is a good fit for your ministry.

Preparing to interview a job candidate is an important first step in the hiring process. Making sure you are familiar with the job and the candidate can be crucial in selecting the right person. It is always difficult to carve out preparation time, but doing so can have a significant impact on the final outcome of the interview process.

Steps to preparing for the interview:

1. Spend time reviewing the job description and specific skills that are required to perform the job.

2. Take time to think about the person vacating the job and what characteristics he or she had that enhanced or took away from job performance.

3. Study the candidate's application and resume so you can ask specific questions about work history and job skills.

4. If the person will be answering the telephone, a phone interview might be appropriate to test how well the candidate communicates on the phone.

5. Select interview questions that are appropriate for the level and job of the candidate. You will obviously ask a manager different questions than you would an entry level employee.

6. Set an agenda and use an interview guide to help keep you focused. Tell the candidate what to expect so there are no surprises.

Some things to remember as you interview a candidate:

- Be aware that an applicant's performance in the interview does not necessarily reflect on his or her performance on the job—good or bad.

- Don’t look solely on what the candidate knows but seek out specific accomplishments and how the person added value to a prior employer.
- Someone with good people skills may indicate that the applicant has the potential to talk too much.
- An applicant who is detail oriented might have a hard time seeing the big picture.
- Be realistic and understand that most candidates stretch the truth or exaggerate at least a little bit, so filter answers accordingly. (Yes, even Christians do this.)

- Interviews are uncomfortable, so do your best to make the candidate feel welcomed and relaxed. The more comfortable applicants are, the more likely they will to let their guard down and have an honest discussion. This is what you are striving for.
- Remember, skills can be taught, but personality and social style cannot.
- Start with the beginning of the applicant’s work history and go through the person’s current or former position. Try to find out why the person left other jobs and look for how long he or she stayed with an organization. Job-hopping every couple of years is an indication of instability and could mean that you will lose them after a short time. In other words, look for patterns of behavior.

Other things to think about.

- Past behavior is the best predictor of future success.
- If the candidate has problems with a former boss, he may have the same issues with the current boss. Most people don’t change.
- Ask for copies of former performance appraisals.
- No matter how well you like a candidate, don’t forget to do reference checks. You’d be surprised what you can learn that maybe she’s not telling you.

Interviewing mistakes managers make:

1. Hiring someone who is like you. This is often done unconsciously.

2. Not probing and drilling down on answers. Keep asking questions for clarification until you get the answer you are looking for.

3. Asking hypothetical questions. This allows for the candidate to give answers that may not necessarily reflect his typical approach to problem solving.

4. Asking leading questions. These can take a candidate down a road that she would not have otherwise gone.

5. Hiring on first impression. If you make up your mind early in the interview that you like the person, you will not be as likely to probe and give the interview the full focus that it deserves.

6. Hiring on gut feeling. Our "gut feelings" are sometimes accurate, but often they are wrong. Make sure hiring decisions are based on objective data obtained from the interview process. But most importantly seek God's guidance on all hiring decisions.

Questions I like to ask job candidates.

- Please tell me why you are interested in working for ABC Community Church?
- What makes you interested in this particular job?
- What is your understanding of the mission and vision of ABC Community Church?
- Tell me what you do in your current position.
- Tell me about a time you identified an improvement opportunity for your employer.
- Describe the best boss you've ever had.
- Describe the most difficult boss you've ever had.

- If I called your boss today, tell me how he would describe you as an employee.
- What would your former boss say your strengths are?
- What would your former boss say your weaknesses are?
- What did your former boss say at your last performance appraisal?
- Tell me how you scored on prior performance appraisals.
- Tell me about a time when your supervisor coached you on performance.
- Describe the performance management process with your former employer?
- What are your strengths?
- What are your personal growth opportunities?
- Tell me about some goals you've had to accomplish?
- Have you worked in a team environment in any prior job? If yes, please

describe how that team functioned.
- What is your personal approach to conflict resolution?
- Tell me about a time you had conflict with a co-worker and how you resolved it.
- Have you had customer service training in the past?
- Tell me about a time when you had to deal with a difficult customer and how you resolved the issue.
- Do you have any personal goals?
- Where would you like to be professionally in five years?
- What are your professional goals?

Interviewing job candidates is a developed skill. Taking the necessary time to prepare for an interview is the best way to practice and develop that skill. Getting to know the job candidate through interview questions improves the likelihood that the candidate will work well within the organization.

Employee Orientation

When employees are new to an organization, it is important for them to go through an orientation process. This is typically done by the person who has responsibility for the HR function. Small organizations that don't hire people frequently, like larger organizations, don't typically have systems and processes in place to ensure a smooth orientation process. A simple solution to this is to create a new employee orientation checklist that is used the first days or weeks after a new employee is hired.

To create a new employee orientation check list, simply gather a group of employees and ask them, **what kind of information was important for you to know when you were first hired?** Going through the new employee orientation check sheet should be a shared responsibility of the person who is responsible for the HR function and the hiring manager.

Here are some examples of things that could be part of a new employee orientation:

Review of Policies
- Employee policies
- Office hours
- Employee benefits
- Vacation request process
- Who to call when sick

Office Tour

- Office/campus tour—i.e., where to find coffee, where to eat lunch
- How to use the phone system, retrieve voicemail, etc.
- Lunchroom (the unwritten rules)

- Where to find office supplies
- Where to find mail
- Keys to facility
- How to operate office machines—i.e., copy machine
- How to log in to computer
- Any pertinent passwords

Compensation Process

- When is payday?
- How are hours tracked and recorded?
- Health insurance
- Retirement contribution
- Overtime
- Lunch/break times

General

- Organizational chart
- Confidentiality
- Staff meeting schedule
- Computer passwords
- Voicemail etiquette
- Email etiquette
- What are the social norms (unwritten rules) of the organization? For example, are employees expected to hang out together at lunch?
- Customer Service Expectations (congregants, volunteers, other employees)

Department Orientation

- Department chain-of-command
- Performance management process
- Employee job description
- Employee goals
- Team expectations
- Employee mentor

- Meet coworkers.

This kind of checklist should be completed and signed within seven days of the hire date and maintained in the department and employee file.

The human resource function for a church has many of the same legal requirements as other organizations and should have a designated person with responsibility and goals assigned to these job tasks. The Society for Human Resources (www.shrm.org) is a great organization that offers resources and training for this critical role.

Job Training

It is important that the ministry provides the necessary training for new employees. This may be training on the telephone system, email system, and any other software that the employee will be working on. This should include identifying a new employee mentor who can be there to answer any questions the employee has. New employees very often try to figure things out rather than ask questions, so having an assigned person to help the new employee will ensure a great start to the work experience.

Job Description

Providing employees with a detailed job description is the best way to prepare them for a successful employment experience. As described in Chapter 2, job descriptions should be reflective of expected tasks and responsibilities of the role and should be updated on annually to ensure that changing focuses and priorities are reflected in the job description. The job description should be explained by the reporting supervisor, and expectations for performance should be laid out clearly as well as the consequences for not meeting expectations. It is poor stewardship to allow employees to continue to perform tasks that may no longer be relevant to strategy and goals.

Managing Church Staff

Having worked for a church for ten years, I have a good understanding of the unique challenges that church employees face. Working for a ministry is different from working for any other type of organization in that it requires some spiritual resilience and self preservation skills.

I have a quote written in the back of my Bible (unfortunately I didn't note who said it) but the quote goes like this:

"Don't get so caught up in the ministry of the Lord that we forget the Lord of the ministry. . ."

Church staff is unique in that they **facilitate** the process of weekly services as well as church events. They are the ones who make sure the doors get unlocked and the building gets cleaned, stocked and prepared for the congregation. They are the ones who prepare the music, organize the volunteers and support the pastor. Very often these responsibilities overshadow the "worship" experience.

Church employees need to have an extra layer of spiritual armor so they can fulfill their responsibilities while maintaining their relationship with God. Employees are one of the three church customer groups, and church leadership should make it a priority to support those people who devote their lives to the furtherance of the Gospel.

Church leaders should have a deliberate plan to encourage and support employees. There are many things that can be done to support church staff.

Things That Can Help Keep a Church Staff Energized and Engaged

Time with God

One day, when I was struggling as a church staff member, I heard God whisper these words: **"You need to do the things you did that got you to where you are. . ."** It was an amazing revelation of the importance of continuing to nurture my personal relationship with God. Those who are responsible for overseeing church staff should make sure employees are taking the necessary time to nurture their own relationship with the Father. This is critical to the effectiveness and endurance of church staff. The church I worked for had a designated noon hour of prayer that all staff was invited to. It was pastoral-led prayer, and employees were encouraged to participate. This model facilitated an opportunity for prayer during work hours.

Time with Self

Vibrant churches have a lot going on, and the opportunities for participation are endless. Staff should be encouraged to prioritize those things that they are involved with so they have ample time to rest, refresh and recharge. Time with family and friends is an important part of refreshing and recharging. Churches should provide ample paid time off so employees can pace their efforts for the long haul. Worn out and exhausted employees are not as productive or enthusiastic as those who are given ample rest and time to recharge, so helping them maintain a healthy work-life balance is important.

Keep the Vision in Front of Them

Keeping the vision in front of the people is a great responsibility and is critical to keeping employees focused on priorities and those things that support the vision. Employees should be reminded of where the church has been, where it currently is and where it is going, and the importance of their role in helping to fulfill the mission. When employees understand how what they do supports church strategy, they feel more connected to their job and engaged in their work.

Keep Employees Engaged

It is important for employees to feel like they are making a difference. When employees are engaged, they put their hearts and souls into their work and maintain the excitement and energy to perform job duties. Unengaged employees merely go through the motions. They may perform job tasks but lack the spark to perform at their best and to make a significant difference.

These are some things that organizations with strong cultures of employee engagement do well.

- The organization has a strong vision that employees understand and feel connected to.
- There is consistent and strategic communication that helps employees understand the church's unique challenges, opportunities and accomplishments.
- There is a lot of research that suggests employees leave organizations not because of their jobs but because of their direct supervisors. Manager interaction with staff is a critical part of employee engagement. This includes how well information is shared, how the manager interacts with employees, how the employee perceives equity and how the manager cares for employees as individuals.

- Staff Development – employees want to know that there are developmental opportunities to grow in their job and within the organization.

Employees need to feel like they do meaningful work and know that what they do makes a difference. Engaged employees put their heart and soul into their job and have the energy and excitement to give more than is required of the job. Employees have a direct impact on the customer experience, making engagement so critical.

Compensation and Benefits

People work on a church staff because of the calling and not for monetary gain. Most church employees recognize that people tithe to pay their salaries and understand the importance of responsible stewardship of God's money. However, it is only right for church employees to be paid a fair and competitive salary for the same job tasks and responsibilities as others who work on church staffs. There are some great resources available online that benchmark church staff salaries and benefits that are based on church size and revenues.

". . .Do not withhold good from those to whom it is due, when it is in the power of your hand to do so. . ." Proverbs 3:27

A structured performance management process incorporates merit increases into an annual cycle that is based on performance appraisals and goal completion. Employees should have a good understanding of what is expected of them and how they will be rewarded for meeting expectations. They should never have to wonder about when they will get raises or what they need to do to perform well. Communication every step of the way helps keep employees engaged. The secret is to create a process and stick to it. For example, if it is determined to award raises in January, the performance appraisal and goal development process should begin in September or October to allow ample time for feedback and performance appraisal development.

CHAPTER 8: Free Labor

Volunteer Management

The beauty of a church community is the abundance of committed people who have an interest in helping the church achieve its vision and mission. Volunteers provide free labor and are an important part of any ministry. They are the ones who play the music, usher in visitors, take care of the children, and so on. Providing good volunteer support helps to create a positive experience for those people who give of their time. This support begins with a volunteer management model that consistently looks for ways to improve the volunteer experience.

"Your people shall be volunteers in the day of Your power" Psalm 110: 3 NKJV

The church was established to equip God's saints and has a responsibility to develop the saints in their walk so that every believer can fulfill the individual plan God has for his or her life. Much of this development is done through volunteer opportunities. Many people use the volunteer experience to get to know other members in the church community and grow in their walk with God.

Good volunteer management is critical to the success of any ministry since many churches don't have the resources for paid staff and rely heavily on volunteer labor. Successful churches have systems and processes in place to oversee and manage volunteers to ensure a great worker experience and that volunteer jobs are performed correctly. A well-run volunteer program creates the infrastructure to support volunteer management and creates a process to facilitate efficient volunteer oversight.

So what does it take to manage church volunteers?

Communicate Clear Expectations

Good communication on the front-end can eliminate lots of unnecessary issues on the back-end. Communicating what is expected helps volunteers be successful. Volunteers donate their time and should be provided with clear job expectations, a detailed volunteer job description, and orientation to the organization. For example, if a new volunteer is unfamiliar with the hierarchy of the church, he may not be able to answer questions while on duty. All volunteers should understand how the church is structured so they are equipped to perform their job duties.

Provide the Tools and Training to Perform Job Tasks

It is important to provide a positive experience for volunteers to ensure they enjoy their assigned job. Volunteers need to understand what it takes to perform their jobs and have the necessary tools or equipment. For example, an usher who is assigned to distribute offering envelopes needs to know where to find them or it could potentially create a frustrating experience. Volunteer training should include information about where needed supplies and equipment are located and who the go-to person is for questions.

Recognize and Reward Good Performance

Just like employees, volunteers should be recognized and rewarded for good performance. This can be something as simple as a handwritten thank you note to an elaborate recognition at an annual volunteer banquet. Regardless, taking the time to think about what volunteers contribute and acknowledge their commitment goes a long way in making them feel valued. There are many volunteer management systems that track volunteer hours worked which provides great data that can help you recognize volunteer efforts.

Celebrate Successes

Church events require a lot of work, and celebrating successes is essential. I've seen churches spend months building campus Christmas displays and understood the importance of recognizing the hours of labor invested in the project. Taking time after a major event to celebrate the successes reinforces the contributions of the volunteers and makes them feel valued.

Most churches could not function without the countless hours of volunteer labor. Taking the time to develop a strong volunteer program and managing volunteers effectively are part of a great volunteer experience and facilitate the proper working of the body of Christ—a responsibility that should not be taken lightly!

Volunteer Orientation

A structured orientation process helps to prepare the volunteer for her new job responsibilities. Volunteers need to have a working knowledge of the church history—where it has been and what it hopes to achieve.

So what should be covered in a Volunteer Orientation?

History of the Church

People who attend the same church for a long time can typically recite the history of the church. New volunteers should know when and how the church started and any milestones along the way. Sharing pertinent statistics like how many people attended the first service, where the early services were held as compared to current membership, and the progression of the church gives volunteers a historical perspective and helps them to connect to the church body.

Mission, Vision and Values

The mission, vision and values of a church are what steers its direction, so it is important for volunteers to understand why the church exists, where it has been, where it currently is and what it hopes to achieve. This kind of information helps to connect the volunteer to the church mission in an intimate way.

Information about the Pastor(s)

New volunteers should know who the pastors in the church are, where they have been prior to serving this church, where they went to school, information about their family and what responsibilities they have in the church. This helps give the volunteer a guide for knowing which pastor to ask for additional information and for addressing church-related issues.

Church Culture

Every organization has a culture that affects the way information is communicated, how decisions are made and how people interact with each other. Giving a synopsis of church culture helps the volunteer understand the "unwritten rules" of behavior. For example, if the church is very traditional, the culture may be less tolerant of talking in church than one that is a little more relaxed and contemporary. The goal is to help the volunteer understand the behavioral norms.

Do's and Don'ts of Volunteers

Everyone comes from different backgrounds and we all have a different frame of reference and life experiences. Because volunteers represent the church, they should be given specific instruction on expected behaviors. Here's an example: A volunteer is expected to report for his job at the scheduled time (do), but a volunteer should not park in the reserved parking area (don't). During orientation and in the church volunteer job description, it's important to communicate as much information as possible to make sure the volunteer understands expectations and to minimize volunteer issues when an unwritten rule is violated.

Customer Service Standards

Anyone who works in a service industry understands the concept of customer service standards. A church volunteer is no different and should become familiar with the expectations for serving church customers (other volunteers, staff or congregation). Reviewing these standards helps the volunteer understand the basic service expectations. People who have never had service training can benefit from basic customer service principles like these: Who are the customers? What do they want? How do we meet their needs? Be polite. Give people the benefit of the doubt. If you're not sure what to do, err on doing what is right for the customer.

Example Service Standards

- Anticipate the needs of customers by identifying expectations and working toward meeting needs. For example, if an usher sees someone enter the church in a wheelchair, the usher should be proactive and help that person find a wheelchair-friendly spot.
- Exceed expectations of all customer groups. For example, a door greeter who sees someone approaching the building will open the door for the person and extend a greeting.
- Hold ourselves accountable for organizational service commitment. For example, when working in a volunteer capacity be constantly aware of the service responsibility in the role.
- Be aware of communication style and always communicate professionally. Be sensitive to eye contact and tone of voice. For example, when a children's church worker is welcoming a new parent, the worker should communicate with a smile and good eye contact to give that parent reassurance that the child will be taken care of.
- Listen to customer requests and take immediate action to fulfill the requests. For example, if the restroom attendant gets a request from a visitor for hand lotion, the volunteer should quickly try to find it for the visitor.
- Keep customers informed of any delays in service. For example, if the

restroom volunteer isn't able to find hand lotion, it should be communicated to the visitor.

- Greet all customers in a professional and courteous manner. For example, all church volunteers should be friendly and greet people as part of their role.

- Inform customers about what to expect and when to expect it. For example, volunteers should make visitors aware of when the church service starts, when it ends, and what they can expect during the service.
- Conclude all interactions with customers in a professional and courteous manner. For example, as visitors are leaving the building, the door greeters should thank them for coming.
- Demonstrate respect for each other and hold ourselves and each other accountable for appropriate behavior. For example, teams of volunteers should watch out for each other and challenge each other if they see someone not behaving appropriately.

Dress Code

It always helps to communicate what is appropriate and what is not appropriate to wear when serving in a volunteer capacity. Some churches have very formal dress codes (suits, ties, skirts, jackets) while others are less formal (business casual, jeans)—it just depends on the culture and tradition of the church. Regardless, volunteers should know what is expected of them.

Chain of Command

It is important for volunteers to understand the church chain of command, not so much to recognize who the "boss" is but to know where to go with issues, concerns, or problems. Example: If the volunteer found that the restroom was out of hand soap, he would need to know which staff employee or volunteer to go to in order to replenish the supplies. This way, the volunteer doesn't ask the pastor about soap right before he is getting ready to preach to the congregation. A printed organizational chart is also very helpful.

Communications Process

Volunteers need lots of information about events, changes or other things going on with the church, so they should know where to find the information that they need. For example, a volunteer should know whom to call if she has to miss her scheduled shift. Or, if volunteer schedules are posted on the church website, every volunteer should know to go there for that information. Proactive communication keeps people engaged and makes them feel valued. The trick is to share information before it is asked for.

Volunteer Program

Volunteer orientation is a great time to explain the volunteer program and how it supports the volunteers. Taking a few minutes to explain how to contact the volunteer office and the services it provides will help volunteers understand who, how and when to communicate.

Volunteers are one of the church's greatest assets. Making sure they are managed well and they receive thorough communication and understand their roles as volunteers can help set the stage for a fulfilling volunteer experience.

Volunteer Job Description

Example Church Volunteer Job Description

Effective volunteer management involves good communication and coordination of job duties. Like employees, it is important for volunteers to have a clear understanding of what is expected of them, and they need to be given the training and tools to perform job tasks. A well-run volunteer program will include a streamlined process to recruit, place and train volunteers in the role that best matches their personality, interests and skill-set.

A volunteer job description should be detailed enough to describe not only job tasks but also job hours and where to go to get questions answered.

When writing a church volunteer job description, it is important to answer the following questions: Who? What? Where? When? How? By considering the job tasks that need to be performed, going through a simple process of asking these questions can flush out the necessary details for the job description.

So what does this mean?

- **Who** does the volunteer report to? For example, who oversees ushers and who does the volunteer report to when scheduled to work?
- **What** tasks is the volunteer responsible for performing? For example, what does the usher do when he/she is on duty?
- **Where** does the job get performed? For example, where do ushers meet

before, during and after church services and where do they hang their coats or purses while on duty?

- **When** is the volunteer assigned to work? When does the volunteer's shift begin and end? At what time should the volunteer report to duty? For example, when is the usher scheduled to work and when does his shift begin and end.

- **How** does the volunteer perform job responsibilities? For example, how do ushers dress, how do they communicate with guests, how do they take the offering, etc.

Using the template below, let's now create an example of a church volunteer job description.

Example Church Volunteer Job Description

Volunteer Job Title: Usher

Reports to: Elder Smith - WHO

Scheduled shift: Sunday 7 a.m. - 11:30 am – WHEN

Job location: Volunteer Room behind West hallway - WHERE

Job Duties: WHAT

- Straighten chairs in auditorium.
- Fill chair pockets with offering envelopes.
- Stack offering baskets.
- Place bulletins in bins by all doors.
- Usher guests to seats.
- Assist people with special needs, i.e., wheelchair, stroller, etc.
- Collect offering.
- Empty offering baskets, sort offering and put in safe.
- Details of Job: HOW
- Ushers meet in the marked volunteer room behind the west hallway.
- Lockers and coat racks are available for personal items.
- Usher supplies, offering baskets, envelopes, umbrellas, first aid kit, etc. are located in the marked closet on the north side of the volunteer room.

- When ushering, men are asked to wear suits and women are asked to wear appropriate business attire.

- Volunteers should report for their shift at least 15 minutes ahead of time.
- Ushers are expected to represent the church in a positive way and demonstrate good customer service skills by being polite, patient, and encouraging and by engaging with the congregation and visitors.
- If an usher has a problem with a visitor or congregant, he/she should contact Elder Smith for assistance.

The process of creating job descriptions can be done quickly and efficiently with a few of the right people in the room. Gather a few folks who understand what needs to be done, sit in a room with a laptop, and just go down the list and answer the questions. You will be surprised at how quickly you can create volunteer role descriptions.

Church volunteers are valuable assets for any ministry which is why it is important to provide good systems and processes to support them. Investing some time thinking through and creating detailed job descriptions is one way to show your volunteers that they are valued and supported.

CHAPTER 9: It's All about Doug and Ella!

Customer Focus

This chapter is about Doug and Ella. Doug and Ella are fictitious characters who may represent any number of people within a church. Doug may be the first-time visitor who is looking for a church and longing to find the right environment for his family. Ella may be that congregant who shows up for church week after week and is trying to find her place in the body of Christ. Doug may be the volunteer who is committed and shows up for his shift week after week but may need to have periodic interaction with the person who oversees his volunteer role. Or Ella may be that employee who has faithfully served on the church staff and just needs to know that what she does matters and that she gets the support she needs to do her job which affects the other three groups.

When I worked in health care there was an ongoing debate between clinicians and the administrative folks about whether or not patients were "customers." Clinicians would argue that a patient is not a customer because he is in the hospital to get clinical care and not get served a hamburger. Here's the challenge with this kind of thinking: If a patient is only in the hospital to receive clinical care, how does he as a person get treated in the process?

My job responsibilities included tracking patient feedback, and we learned that patients don't know how to assess good clinical care (do you know if someone did a good job taking your vital signs?) because they don't have the clinical training to know what is right and what is wrong. But patients do know when someone treats them compassionately.

The same is true in the church world. The church is starting to recognize the importance of meeting the needs of their congregants, volunteers and employees. These three vital customer groups make up the church and without them there is no church. Congregants fund the church, volunteers run the church, and employees facilitate the process.

What does a customer expect from a church?

An inviting facility

Those of us living in the prosperous United States have become accustomed to nice, comfortable facilities. Whether it is the mall, hotel or grocery store, we have learned to expect clean, orderly and inviting environments. It is no different for the church which is why paying attention to the details is important. For example, when visitors drive into the church parking lot, what do they see? Is there debris in the flower beds or are the bushes and plants neatly trimmed? When they walk in the church's front door, are the windows clouded with finger prints or are there freshly painted walls and pleasant scents. All of these subtle details affect the first-time experience.

I worked for a pediatric hospital, and we cared for patients from all over the world because of some of the specialized treatments we provided. Because it was a kids hospital, we provided what we called parent lounges. These areas had pull-out beds, showers, TV sets, phones and linens for the parents who spent the night with their children.

We wanted to learn about the parents' experiences so we held two parent focus groups. The first was with our Medicaid population (those families without a lot of money) and the second was with our insurance population (those with more financial resources). We asked the two groups what they thought of the parent lounges. The outcome was interesting. The Medicaid group raved about the facilities. They were thankful that there were pull-out beds and were amazed that we offered showers with all the amenities. They appreciated being able to stay with their children. The insurance group, however, said, well the beds are kind of lumpy and the television is too loud and the restroom is messy after others use it. Two completely different responses—each population came from a different background and each group had a different frame of reference for what is nice. So we knew as an institution we had to meet both groups at the lowest common denominator. We remodeled the parent lounges to provide more privacy, updated the furniture and provided more attention to keeping the restroom facilities orderly. We implemented some quiet time guidelines and found that both populations were satisfied.

Our church home is very similar to our own home in that those nicks on the wall and stains on the carpet become so familiar to us that we have the tendency to overlook them. But a visitor sees these things immediately when she first walks in the door. You know how it goes: Nobody notices when your house is clean, but everybody notices when it is disorderly and dirty.

Friendly People

When visitors walk through the doors of a church they are searching for something. Very often these people are at a low point in their lives and they've come to realize their need for a church experience. Other times people are searching for the right church home for their family. Either case, a visitor will assess a church experience by how welcoming and friendly the people are. The challenge with this is, some people want to be noticed and identified as visitors and others want to visit without a lot of fanfare, so striking the balance can be a challenge and a training opportunity.

Visitors walk in the doors of churches every day and quickly assess the experience. Smaller churches may be able to identify visitors quickly and have a plan to welcome them. Larger churches don't always have this luxury, so they need to create an environment that is welcoming for everyone who walks through the door.

People who are new to a church want to connect with the church family and need help learning how to establish friendships. Providing an inviting experience and friendly first-time contacts will make people feel welcomed.

What Does the Body Want?

The congregation is the body of the church. Each part of the body has a role to play and each member has its own unique needs. Each of us is on a personal journey and we all have specific spiritual developmental needs. The congregation's expectations are dependent on the organization's ability to share the mission and vision. When congregants understand where the church is going and buy into the vision, they offer volunteer labor and financial support. However, there are times when congregants have needs and expectations (sometimes demands) that don't line up with the vision. For example, a young couple with small children will have an expectation for the church to offer a great children's program for their kids (which would line up with most church visions). But another congregant may have an interest in setting up a table in the lobby to sell Girl Scout cookies, which may not line up with the vision. Being able to support those needs that line up with the vision is important, while meeting unreasonable demands is not.

Every church operates by a different guiding mission and vision which affects its focus and priorities. This means the needs and expectations of congregants may be different from church to church. The tricky part of overseeing a church body is the responsibility to stay true to the call and vision for the church. This is difficult because congregants sometimes have needs that don’t always line up with the vision. When this happens, congregants may decide to look for a church that better meets their needs. These are very difficult situations, but maintaining focus on the mission has to take priority to fulfill God’s purpose for the church.

Are Employees Customers?

It may take a paradigm shift to think of employees as a customer group, but they are probably the most important customer group any organization has. Employees facilitate the process of making “church” happen and often with limited resources. This requires a special calling that is unique to church employees. Church leadership should recognize the unique aspects of being a church employee and provide the resources and support to ensure a great employee experience.

Employees are customers of each other (department-to-department). For example, think of how the IT person supports the church secretary. Employees whose needs are met are better equipped to take care of the other customers (volunteers, congregants and visitors) that they serve.

How Do We Assess the Customer Experience?

Soliciting feedback helps the church learn about the customer perspective and identifies ways to improve the customer experience. Just like any other request for learning what someone thinks, customer opinions can sting, but reflection on honest feedback can shed light on areas that need to be improved. The saying “Sometimes the truth hurts” is a very true and important part of any improvement model. I’ve always told my employees that “I can’t fix it if I don’t know it’s broke.” This means leadership can’t make improvements unless they know that the issues exist and the only way to know that is for the person who is experiencing the process to give an honest perspective. For example, if an employee in Children’s Ministry is checking families in on a computer that is outdated and not functioning properly, the parent experience will be affected. Which is why it’s important to make sure the employee (customer of the church) has good equipment to take care of the parents (customer of the church).

Employee Feedback

Employees are among a church’s most valuable assets, and providing a pleasant work environment is important to ensuring that all customer groups are taken care of. If employees are lacking the necessary resources—time, equipment, and training—to do their jobs, they will have a difficult time providing the necessary support to their customers.

Volunteer Feedback

Volunteers are the labor engine of a church and having a good understanding of how their needs are being met is important to keeping them engaged and committed to the church and their job responsibilities. Volunteer feedback provides insight into the volunteer experience and allows the ministry to learn how to improve the process of volunteer recruitment, placement, training, and job assignments.

Congregation Feedback

Church members fund the church operation and are an important customer group. Looking at how the church meets its members' spiritual, social and physical needs is important as long as those needs line up with the mission and vision of the church. For example, if the church learns that a congregant has concerns about how the church is communicating with its members, this may be an issue that warrants further investigation and some changes. On the other hand, if another congregant voices concerns about the church not allowing him to use the auditorium for an event that is not church related, it's important to communicate with that church member to explain the reasons. Soliciting feedback from church members helps to identify issues that may need to be addressed and it opens lines of communication.

There are Dougs and Ellas all around us and as church leaders we need to understand who they are, what they need from the church, and how to make their church experience—whether they are a visitor, congregant, volunteer or employee—one that they will remember and bring their families and friends to experience.

CHAPTER 10: How do others see us?

Public Relations

Public Relations is about how an organization is perceived by the community it serves. But do churches really need public relations? Should they care about how others view them? The answer is yes because the church represents Christ and the church body has a responsibility to represent Christ with excellence and maintain a positive public image.

Developing a Public Relations Strategy is instrumental to influencing the public image and perception of a church. A good strategy can help build rapport with congregants, employees and the general public. The goal would be for the ministry to have a good reputation within the community.

A well-thought-out strategy can be used as part of a comprehensive plan and provide a roadmap for a public response during times of crisis.

Five Steps in Creating an Effective Public Relations Strategy

1. Discovery

Discovery is a process an organization goes through to understand what their church is, who it serves and who it interacts with in the community. This process is done through very specific strategies and research. For example: a church supported homeless shelter may have a vision to "provide shelter to those who have temporarily lost the ability to provide for themselves." This statement helps an organization understand who they are, what their mission is and who they serve.

The ministry will then try to identify who in the community they interact with. In the case of a homeless shelter, it may be residents or businesses within the neighborhood they serve. The church should have a goal to create a positive relationship with everyone they interact with. This is important because, in the case of a homeless shelter, a positive relationship can possibly increase funding, identify volunteer labor or foster collaboration for joint community projects.

2. Public Relations Plan

Developing the PR plan is very similar to establishing church goals and should be done as part of a strategic planning process. PR goals and objectives should be focused on communicating what was learned in the discovery phase. It is important to have a well-thought-out communication plan for congregants, employees, the general public and those who interact with the organization. For example, how does the ministry make the public aware of the homeless shelter?

Another part of the plan is developing strategy for how the organization can be both proactive and reactive. The plan is proactive by educating the public on the services the church provides as well as maintaining a positive public perception. The plan is reactive in how the ministry plans to respond to unplanned or unforeseen events. Having a written strategy is the key to facilitating a positive response.

An important part of the plan is to identify the person who speaks on behalf of the organization, the message that will be communicated as well as the tone of the message. It takes specialized training for someone to be able to field questions from the media, so having a person with the right skill set and gifting is critical.

3. *Public Relations Policy*

PR policy should be written for how to communicate or respond to any number of situations. This includes communicating with employees or the news media or an announcement as part of an advertising campaign. For example, identifying what and how information is communicated about a community outreach event is an important part of the policy creation.

4. *Plan Implementation*

Implementing the plan according to policy requires budgeting, scheduling and a process to roll out the plan. Budgeting and timing of implementation is critical to the end result. For example, dollars may be budgeted for printed material about a church- sponsored event or community outreach.

5. *Evaluation*

It is important to evaluate the performance of how well the plan is working, and having SMART Goals can provide measures for tracking success over time. Using the PDCA model of quality improvement can also help facilitate a consistent process.

A good PR strategy can help build relationships with congregants, donors, employees and the general public. Having a reputation for positive things, such as giving back to the community, being a great place to worship, or being supportive of other social needs can do more to acquire new members than any other form of advertising. People like to connect with a church that is doing the work of the Kingdom!

CHAPTER 11: How do people know what we do?

Church Marketing (not a four-letter word!)

Internet Presence

An Internet presence for the church is critical in this digital age. Kids have grown up on the Internet and use it to research and seek out information. Like any other organization, churches must have an Internet presence that is appealing to this generation. You may never get them in the door if their perception of the church is based on their Internet research that is less than positive. I've heard people more than once say they visited a church because of how their website looked!

Website

A church website represents the culture and style of the organization. It is important to create a site that is current, informative, engaging and easy to use. Churches are judged by how their website looks.

Blog

Blogging is a form of giving back and engages others in topical conversations. Creating a church blog is a great way to interact with the congregation and share biblical concepts every day of the week. For example, writing a blog post on Monday about the Sunday sermon that goes deeper into the topic can provide supplemental teaching for congregants.

Facebook

Facebook is a social phenomenon that is used by millions of people worldwide to connect to each other. Every generation is now engaged on Facebook, and churches should capture the moment to interact with its congregants. For example, a church can create a Facebook page and share information about specific outreach or ministry events.

Twitter

Twitter is a great way to keep in touch with congregants. For example, a youth pastor can tweet a daily scripture to youth, or the volunteer office can tweet a call for volunteers. It is a 140-character message that can be sent to cell phones, making it quick and timely.

YouTube

The YouTube generation is strong and growing. This new phenomenon in communication has rewritten the rules for marketing, advertising and public awareness. The sight and sound generation has redefined how we communicate, and video is the tool of choice. According to Viral Blog in a May 2010 study, YouTube has some interesting statistics:

- Exceeds 2 billion views a day;
- Has 24 hours of video uploaded every minute;
- The average person spends at least 15 minutes a day on YouTube;
- 70% of YouTube traffic comes from outside the United States;
- There is more video uploaded to YouTube in 60 days than all of the 3 major networks created in 60 years!

These statistics are staggering and the numbers are growing every day.

So why would a church want to utilize this phenomenal tool? Or the better question might be, why would a ministry not take advantage of YouTube?

Ways to utilize YouTube videos in church PR Strategy:

Senior Pastor Introductions

A YouTube video can be a great way for visitors to get to know the senior pastor and members of the staff. The senior pastor can share the vision and plans for the church. YouTube is only one video tool that can be incorporated into a church website to gain exposure and creditability for the church. This kind of strategy can help get potential visitors engaged in what the ministry is doing.

Employee Recruitment

Churches can use YouTube to recruit employees. Using video of current employees to describe the value in working for a ministry can help spark interest in potential job candidates.

Ministry Program Description

Video can be a quick and effective way to describe the benefits of participating in a church program. Whether it is helping with children's ministry or serving the seniors of the church, a video can help demonstrate the benefits of participating. This can be especially helpful when new ministries are launched.

Philanthropic Support

Many churches rally around a cause, and a video describing the support for a philanthropic effort can also help solicit donations for the same cause. For example, if a church operates a food bank they could create a video showing the lives it impacts and the importance of financial support.

Ministry Advertisements

YouTube is also a great avenue to show off ministries within the church. The same promotional video that historically would have run on television can now be run on the Internet—and it's a much less expensive way to get the word out. For example, a video showing the great things the youth program does could create an interest in the program.

People go to the Internet to find what they are looking for, and a video description of a service or ministry offered at your church can be a great way to get the promotion in front of many eyes. And the great thing about YouTube videos is they don't have to be professionally done and can be created for minimal cost.

Taking advantage of all the new technologies today is a great way to keep the public informed of the great things the church is doing.

CHAPTER 12: Ready or Not

Church Emergency Planning

The extreme weather patterns of recent years remind us that it is a good time to stop and think about how to plan, prepare and be ready to respond in the event of an emergency or disaster. Hurricane Katrina left many churches scattered, and rebuilding is taking years.

A disaster can be defined as a natural disaster (flood, hurricane, tornado, earthquake), an act of terrorism (think 9/11) or armed intruder (Columbine). Each of these scenarios has its own unique issues, but there are some common things that can and should be done to prepare.

Most emergencies or disasters happen without much warning. Even those with some warning don't allow enough time to come up with an emergency management plan.

So what is an emergency management plan?

It is a written document that answers the questions of who, what, where, when and how to get the church back up and running following a disaster or emergency. An emergency management plan manual can be as detailed as you'd like or as simple as thinking through some basic logistical first steps. Obviously the more detailed your plan is, the less "thinking" you will need to do at a time when there is chaos and many logistical challenges need to be addressed. Imagine your church running without computer systems, communication systems, employee support or a functioning facility. Thinking through the "what if" helps prepare.

Emergency planning requires a team made up of representatives from senior leadership, information technology, facilities management and support employees. This team is responsible for thinking through all of the logistical **"what if"** questions. For example:

- What is the communication process?
- Who do we communicate to and in what order?
- Who is the spokesperson for media questions?
- Where is the command center if the current campus is not available?

- How do we manage without a computer network?
- Are network files backed up?
- How can we get hardware quickly?
- How do we communicate without a phone system?
- How do we share information with the congregation, volunteers and employees?
- Where should we have temporary church services?

Once you have a plan in place, it is important to go through a fictitious "what if" scenario to test your plan. Many organizations hold what they call disaster "drills" to test their plans and use the exercise to learn how to improve the plan. It is amazing how different things look when you go through the process of implementing recovery steps. I have worked with teams who have gone through these drills and cannot emphasize how valuable the experience is and well worth the time investment.

So what are some things you should be thinking about in the time of crisis or disaster?

There are typically three phases of any disaster or emergency.

1. First Response

In the first response phase the initial need is to ensure safety and security of the facility and provide immediate help to possible victims. This can include life sustaining efforts, first aid, food, water and basic living essentials. This phase also includes being prepared to handle any media inquiries which would require having an articulate scripted spokesperson prepared to represent the ministry.

2. Clean-up Phase

This includes cleaning up any damage and getting the facility prepared for employees and customers to reenter. In the case of an armed intruder, much thought should be placed on how employees will mentally prepare to return to work. This is also the phase where grief counseling may need to be explored.

3. Recovery Phase

The final recovery phase is getting the facility back in order and ready to reopen for church services. Depending on the emergency or disaster this may take a few days, weeks, or months. In the case of a long-term recovery process, it is critical to have a designated place to have church services as well as a command center where a leadership team can help facilitate the recovery process. This includes communicating with congregants, volunteers, employees and the general public.

Emergency Management Plan Manual should include:

- Well-thought-out steps of action for each of the three phases of recovery. This is where you identify the who, what, where, when and how.

- Emergency contact information for employees, vendors and key congregants.
- Information system requirements for hardware, software and business data back-up files.
- Telephone system layout.
- Diagrams of building layout.
- IT Network diagram.
- A call tree of the leadership team—basically what is the chain of command, who gets notified first and who notifies whom.

Once the manual is completed it should be one of several items placed in an emergency management box. This box should be kept at a location away from the church campus.

Contents of the emergency management box should include:

- Emergency Management Plan Manual
- Employee Manual
- Copies of insurance documents and policies
- Hard drive with computer software
- Backup files on all key business data
- Employee contact information
- Key member and vendor contact information
- Name tags for employees in case they need to be identified to cross into restricted areas.
- Basic office supplies (paper, pens, tape, stapler, etc.).

The box should be updated every six months to keep contents and contact information current. Here are two websites that can be useful in helping you prepare your organization for unexpected emergencies: ready.gov and fema.gov

There will always be unpredictable aspects to any disaster, but a little upfront planning can take a chaotic emergency situation and turn it into a smooth running recovery process.

CHAPTER 13: Spiritual Warfare

I worked in corporate America for many years before God called me to use my business skills to help the local church, and I remember the very real challenges of being a Christian in a secular environment. I remember experiencing spiritual warfare and resistance, I but felt that was just what comes with being a Christian.

I also remember when I first went to work for my church, I had a meeting with our Senior Pastor and he warned me about how difficult it can be to work for a church because of the sometimes intense spiritual resistance. I also remember saying that Christians out in the world deal with spiritual warfare all the time, and I declared that I was conditioned for it. He said it’s a little different when you work for a church. A couple of months later when I was meeting with the Pastor, I confessed that he was right and that I had noticed it was different—the spiritual resistance was a little more intense.

The first couple of months working on a church staff I was mentally bombarded with what I now know was the enemy shooting “fiery” darts at my mind. I continued to keep reading God’s Word and learned to identify and resist the attacks. I also recognized that the entire staff dealt with the same thing and that it was our responsibility as leaders to help the employees cope with the spiritual side of working for a ministry.

I soon recognized whenever there were normal office setting issues with the staff that the problem seemed to be a little exaggerated. I came to realize that the issues were consistent with any environment that had employees, but the spiritual component made them feel bigger than they were. Normal dealings that pertain to things like communication, team interactions and team dynamics were most susceptible to attack.

I don’t think it’s a surprise to any Christian that the enemy hates those of us who are called to help the cause of Christianity, and he is working overtime to discourage and hinder our effectiveness. Taking the time to teach church employees these concepts and help them to recognize spiritual dynamics and learn how to respond appropriately can help disarm the enemy and keep employees focused on their natural responsibilities. I don’t like to over spiritualize things because there is way too much of that in the world, but I do think it’s important to recognize and address those things that hinder the progress of the church.

10 Finally, my brethren, be strong in the Lord and in the power of His might. 11 Put on the whole armor of God, that you may be able to stand against the wiles of the devil. 12 For we do not wrestle against flesh and blood, but against principalities, against powers, against the rulers of the darkness of this age,[c] against spiritual hosts of wickedness in the heavenly places. 13 Therefore take up the whole armor of God, that you may be able to withstand in the evil day, and having done all, to stand. 14 Stand therefore, having girded your waist with truth, having put on the breastplate of righteousness, 15 and having shod your feet with the preparation of the gospel of peace; 16 above all, taking the shield of faith with which you will be able to quench all the fiery darts of the wicked one." Ephesians 6:10-16

Strategy

I've counseled countless situations when an employee was dealing with "stuff" and tried to talk the person through the spiritual side of the situation. The same way God cares about every detail of our lives, the enemy loves to disrupt even the slightest of things to get us off track, slow us down and hinder our progress. For this reason it is important that employees learn to identify things for what they are and learn to cope and move forward.

One of the best ways to do this is to call a spade a spade. Most Christians can recognize spiritual oppression after they've gone through it, but it is very difficult to see when in the heat of a battle. This is why it is good to have other Christians help. Church staff should be made aware of these difficult aspects of working for a ministry and given the tools and support to resist the enemy.

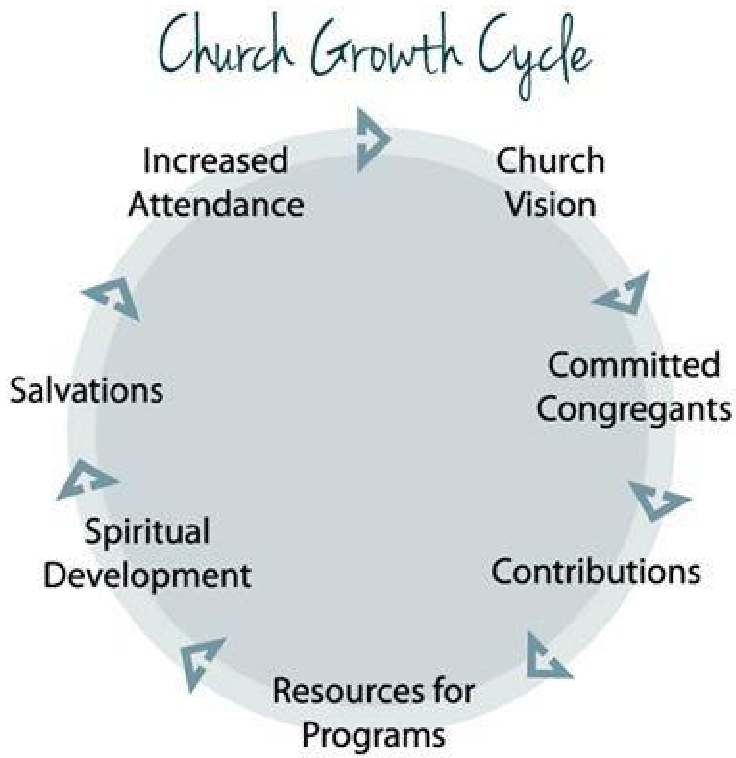
Providing staff with designated times to meet and discuss the spiritual side of ministry can open the door for meaningful conversations that help keep things in perspective.

We set aside time for project planning, so why not invest needed time into the spiritual warfare side of ministry?

CHAPTER 14: Church Growth

Growing a church takes a great vision, faithful congregants, discipleship programs and resources to do all of the above. Churches that have experienced growth have realized that growth comes from a great vision that attracts committed congregants. Committed congregants tithe to support the vision and those contributions are invested into program and spiritual development which leads to salvations and people getting their lives changed which turns into committed congregants.

The Church Growth Cycle



Getting churches ready for growth is an important step in preparation for the upcoming harvest of souls. Growing a church takes vision, thought and strategy. Successful churches are those that follow a God-given vision and map out steps to achieve that vision. The beauty of the body of Christ is that God uses everyone in a slightly different way and those unique qualities that each church has is what God uses to create a beautiful tapestry in the church world.

Church growth is not about competing with the ministry down the street but more about how the people God has planted in the local church are disciplined and used by God with their unique gifts. I believe people are called to churches for a specific purpose. We are all on a journey, and the church helps us develop as Christians and supports our unique calling. In his book, Purpose Driven Church, Rick Warren says

> *". . . Since the church is a living organism, it is natural for it to grow if it is healthy . . . if a church is not growing it is dying . . ."*

This can be a scary concept for a small local church.

With growth comes many challenges but the exciting thing is that with God ALL things are possible and He gives wisdom freely! I have a theory that some churches fail to thrive and grow because the leadership gets comfortable with the way things are and doesn't do anything to change the status quo.

If God called you into ministry, don't take that call lightly. Spend time with Him and He will instruct you in the way you should go! If you take that instruction, write the vision down and map out a plan to get there. Biblical church growth is inevitable!

About Smart Church Management

Smart Church Management (SCM) is a church operations and management consulting company that offers services to help the local church develop systems and processes to support church growth. Whether the system is to manage and budget limited resources; recruit, train and schedule volunteers; or manage the process of hiring, training and developing church employees, SCM strives to help churches manage their day-to-day operations.

Patricia Lotich, President and CEO of SCM, is an MBA and Certified Manager of Quality and Organizational Excellence through the American Society for Quality. She has ten years of Business Administration and Church Operations experience and has a driving passion to help churches fulfill their call by managing the resources God has given them – people, time and money.

Patricia became a Christian as an adult and is committed to using her business experience and gifts to help the local church. She is an avid (learning) golfer and spends her free time with her husband Bob, lap-dog Maggie and two grown children.

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