

# Organizational Assessment

[REDACTED]

[REDACTED]

[REDACTED]

## 1 EXECUTIVE SUMMARY

---

Based on interviews with each of the pastors of the [REDACTED] churches, as well as follow-up interviews conducted as necessary with support staff and volunteers/trustees, the consultants' recommendation is that the churches could realize some cost-savings as well as efficiencies by:

1. Contracting with a single point-person or management company to undertake all facilities-based issues (space rental, tenant negotiations, custodial and maintenance needs)
2. Utilizing one full-time staff person to perform communications and some bookkeeping functions
3. Sharing a single copier (with volunteer utilization to pick up documents as needed)

Other improvements can be made in the areas of calendaring and IT management. Generally, financial operations are in alignment with the principles established [REDACTED]. Payroll is an area which may be suited to the staff person hired, or it may be best to outsource to a payroll company such as ADP or handled through Intuit (Quickbooks). Some payroll services may offer a discount; effort should be made to contact [REDACTED] in order to determine if there is a firm which they may recommend who could offer a discount or non-profit rate.

Findings have been grouped by topic, aligned with the areas of inquiry. Recommendations have not been tested for feasibility; recommendations are solely the opinions of the consultants and have not been vetted by any church affiliates prior to presentation. When the churches consider implementing recommendations, priority should be given to the "easy wins" – those implementations which can be enacted at lower cost, in terms of both time and resources.

[REDACTED]

The consultants have provided a matrix of software needs along with some un-vetted possible solutions as an additional appendix.

## 2 FINDINGS AND RECOMMENDATIONS

---

### 2.1 BACKGROUND INFORMATION

**Finding:** All [REDACTED] churches rely heavily on volunteers to contribute to the overall operations of the churches. Churches range widely in number of committed volunteers, with a [REDACTED]

**Recommendation:** Continue to keep volunteers engaged but consider shifting some duties away from volunteer base. (See findings under Finances, IT Operations, Office)

**Finding:** Only one church has full time office personnel [REDACTED]. Other churches have paid staff at varying levels.

**Recommendation:** Churches should look at hiring a single full time staff person who can address the needs of each of the churches within a forty-hour-per-week position. The staff person's responsibilities should include the following:

- Coordinating communications (see findings in subsequent section) for each church. There may be opportunities to utilize shared templates and/or reuse content across churches.
- Entry of approved expenses into a single platform (Quickbooks)
- Entry of weekly income into a single platform (Quickbooks)
- Membership database maintenance into a single platform (Church Windows, Shepherd's Staff, or a similar church-centric ERP)
- Onsite filing and mail maintenance at each church's office (once per week or at an as-to-be-determined schedule)
- Coordinate back-ups and IT maintenance of each church's files. Oversee move to cloud-based services so work can be done remotely
- Website updates as needed for each church (churches have varying needs, please see subsequent sections for additional information)
- Email response as needed for each office@... domain
- Answering phone calls as needed and routing to appropriate ministers or church personnel
- Fielding questions about special events

To ensure continuity of operations, volunteer(s) sourced from the church community should be cross-trained on office staff functions.

### 2.2 COMMUNICATIONS

**Finding:** Each church produces communications as follows:

- Weekly or bi-weekly digital newsletter/email
- Weekly bulletin for church service (print)
- Monthly newsletter (digital with print copies available)

Announcements in the newsletters frequently overlap between churches (announcements, things of interest to the community at large).

**Recommendation:** The churches could realize some potential cost-savings by centralizing these functions, and using a single template. If the churches choose to pool resources and hire a single office manager, that manager could produce all of these communications while reducing redundant work and providing consistent messaging for all churches. Announcements of interest to the community at-large would be replicated and provided to the different mailing lists and/or weekly worship participants.

**Finding:** There are varying calendar systems in use. Some churches do not have a calendar available online, some do not have digital calendars in use at all and rely on a paper calendar in the church office.

**Recommendation:** We recommend that the churches move calendaring to a more transparent and easily visible system such as Google Calendar. Google Calendar is free and easy to share among users at different permission levels (view, edit, add/delete). Additionally, for those churches that publish updates to their websites, the method for adding a Google Calendar to the page is extremely simple.

[REDACTED]

2.3 FINANCES

**Finding:** The churches vary in the way they track finances (using different software programs or no software), process payroll, and, in one case, schedule their annual budget (with a different fiscal calendar).

**Recommendation:** In addition to a full-time office staff person, we recommend the following:

- Contract with a single bookkeeping service to manage all [REDACTED] finances [REDACTED]  
[REDACTED]
- Use one software program to track donations (as well as membership and attendance) – designate one primary financial secretary position (with a second trained back up) to enter the pledge information on a quarterly basis.
- [REDACTED]  
[REDACTED]
- [REDACTED] electronically to avoid risk and improve transparency
- If sharing staff and software, make fiscal year consistent across all churches
- Contract with a single payroll service to process payroll

2.4 PURCHASES

**Finding:** The churches have similar needs (such as phone, internet, etc.), but use separate companies for these services and pay different rates. [REDACTED]  
[REDACTED]

**Recommendation:** In order to save costs and improve efficiency, we recommend that the churches share payroll, internet, web hosting, and janitorial services and consider using a central copier.

Consider sharing VOIP phone service (especially if there’s a shared office manager) to enable routing of calls to individual pastors from a central location, thereby minimizing cost.

## 2.5 IT OPERATIONS

**Finding:** The churches vary in their use of technology (often depending on the expertise of member volunteers and/or the pastor and the comfort level of the congregation) and type of hardware and software. All of the churches have websites, use electronic communications (text, electronic newsletters, email) and several use social media (such as Twitter and Facebook). [REDACTED]

**Recommendation:** In addition to a shared office staff person, to save costs and improve efficiency, share the following:

- Software for backups (unless using the cloud or backup hard drive), software such as MS Office [REDACTED] and Adobe InDesign for newsletters and bulletins, calendar (such as Google Calendar), email, and web hosting.
- IT contractor (especially in case of emergency). [REDACTED]
- Create separate emails and domain aliases to eliminate need for using personal email accounts.
- Continue separate use of social media (Facebook and Twitter) to customize for each church.

## 2.6 OFFICE

**Finding:** Most church offices have limited foot traffic and members can reach pastors through their cell phones, emails and/or church phones.

**Recommendation:** No changes are needed.

## 2.7 ASSET MANAGEMENT

**Finding:** Most churches have physical assets [REDACTED] and no churches are carrying debt.

**Recommendation:** see 2.9, Building Operations, for recommendations.

## 2.8 ARCHIVES

**Finding:** The churches vary in how and where they store archives. [REDACTED]

**Recommendation:** Consider using a shared off-site storage facility to reduce risk of loss and damage. Alternately, there is the opportunity for church staff or volunteers to embark on the process of digitizing (via scanner) old records. A volunteer from the churches should coordinate [REDACTED] to determine how this group should interface with those needs.



## 2.9 BUILDING OPERATIONS

**Finding:** Rental rates, outside usage and janitorial services vary among the churches. Most churches depend on tenants to pay for building expenses and taxes. Pastors and office staff spend a significant amount of time on facility management (including tenant and event management).

**Recommendation:** Share the following to reduce costs and workload:

- Property management service to handle tenant and building issues (including contracting, building maintenance, etc.)
- Janitorial services.

## APPENDIX: SOFTWARE MATRIX

AREA OF NEED	POTENTIAL TOOL(s)	NOTES
Bookkeeping	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
Web hosting / updating	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
Calendar	[REDACTED]	[REDACTED]
Membership & pledge tracking	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
Backups	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
Publications (print and web)	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]