

Implementing Policies and Procedures

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Goals

- Understand differences between Policies and Procedures
- Review samples of each
- Understand Matrix for Developing Policies and Procedures for your parish
- Understand Benefits of written Policy and Procedures

Policies and Procedures

The Purpose of Policies and Procedures is to be the strategic link between the Parish Vision and the day-to-day activities of the parish.



Policies and Procedures

What is the advantage of having written Policies and Procedures?

At the CORE is to CARE

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Charitable Disposition

Organized

Reliable

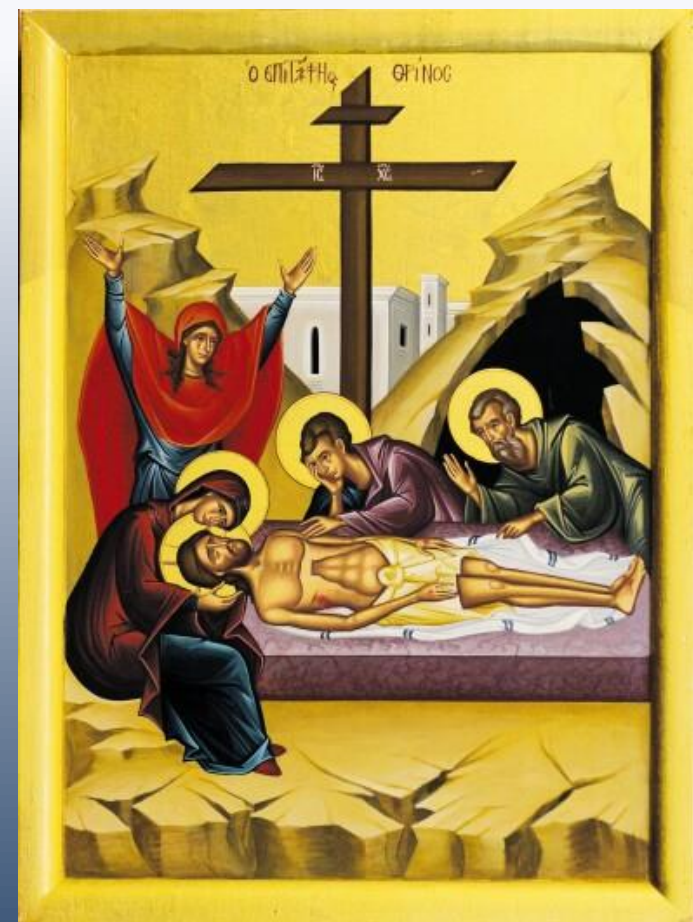
Evenness

Confidence

Adherence to Policy

Responsive

Efficient



Policies establish general guidelines for decision makers on how to handle situations as they arise.



Policies

- General ideas
- Explains Reason for policy
- Tells how to apply
- Written with simple sentences and paragraphs
- Assigns responsibility

Procedures

- Specific Actions
- Explains Purpose of policy
- Gives Alternatives
- Written in step by step or outline format
- Gives examples

Sample of a Written Policy

Sources of Revenues

The church's revenues are derived from various sources including stewardship and offerings, gifts designated to buildings and property, gifts of securities, gifts to ministries, and other miscellaneous income.

Any cash received in the amount of \$10,000.00 or more must be reported to the federal government using IRS Form 8300.

The main source of revenue for the church is received in the form of stewardship and offerings during regular church services. Please follow the procedures noted on the following pages to secure the regular tithes and offerings from services.

Tithes, offerings, and gifts may be received via the U. S. mail. All mail is to be removed from the mailbox by a staff accountant, taken to the accounting office and processed. Any mail not specifically addressed to an individual employee of the church will be opened by the staff accountant. All mail is to be date stamped and sorted. All mail will be reviewed by the Executive Administrator and CFO and checks will be placed in the churches safe after review.

Gifts of securities, including mutual funds, to the church are processed by the accounting office and reviewed by the Executive Administrator and CFO. The Executive Administrator and CFO coordinate the gift with the donor or donor's broker. The staff accountants record the gift and coordinate the sale of the security. The Church's policy is to sell all gifts of securities unless the donor specifically requests otherwise. All transactions are reviewed by the Executive Administrator and CFO.

Sample of a Written Procedure

Collection Offerings

1. Arrive at _____ no later than ____:____
2. Bring briefcase with bank bags and place in the offering counting room rear of the Sanctuary – East Side
3. Confer with the head usher to get an appropriate basket count for each service
4. Make sure there are appropriate number of ushers for the appropriate service
5. During closing announcements, stage inside the Sanctuary
6. Watch offering baskets come across aisles
7. Enter counting room with the assigned Parish Council member, head usher and allow only ushers with badges to enter the counting room
8. Make sure at least two ushers remain in counting room until offering is secured in locked bag

Collection Offerings

9. Oversee separation of Stewardship Cards and Offering
10. Confer with head usher to insure all offering baskets are in the offering room and the basket count is correct
11. Retrieve locking zippered bag from briefcase
12. Place Offerings in locking zipper bag, lock bag in presence of Ushers
13. Place locked bag in briefcase, with Stewardship Cards
14. The assigned Parish Council member will escort the head Usher to the Accounting office.
15. Place the locked offering bag in the safe and distribute the Stewardship cards to the appropriate desk
16. Repeat above steps for additional services

Development of Policies

1. Identify Need
2. Assign Lead Responsibility
3. Gather Information
4. Draft Policy
5. Engage those who are affected
6. Finalize and Approve
7. Review and Revise Annually

Identify Need

Two Areas

- **Anticipation of need**

Youth Protection Manual and background Screening for all those who will work with Youth

- **Response to need**

Role of a second Priest, New Hall Rental policy

Assign Responsibility

- Determine if an individual or a committee will take the lead on developing Policy
- Reinforce Policy must follow Vision and Mission Statements, easily implemented and meet any legal responsibilities
- Establish a deadline

Gather Information

- Review previous policies
- Investigate alternatives from other sources
- Research any legal issues if necessary

Draft Policy

- KISS method
- Draft with implementation in mind
- Assign responsibility of policy

Draft Policy

- Review new Policy with all affected for ideas and understanding
- Encourage their input
- Including those affected will create an easier adaptation of new policy changes

Finalize and Approve

- Present to Parish council for review and acceptance
- Determine whether Parish Assembly requires final approval
- Publicize changes affecting Stewards
- Print new Policy Manual

Review and Revise

- Annually Review Policies
- Ideally when new Parish Council first convenes
- Revise as needed

Procedure Implementation

1. Identify Need
2. Assign Responsibility
3. Gather Information
4. Draft Procedure
5. Consult Stakeholders
6. Finalize and Approve
7. Review and Revise

Identify Need

- Review Policies for areas requiring further understanding
- Determine whether more defined steps are required
- Examples may also be sufficient

Assign Responsibility

- Determine if an individual or a committee will take the lead on developing Policy
- Involve those most affected
- Set a Deadline

Gather Information

- Review previous procedures. If not written, interview those most knowledgeable
- Investigate alternatives from other sources
- Determine if a form is necessary

Draft Procedures

- Create specific step-by-step instructions
- Draft with implementation in mind
- Create a form for ease of information gathering where possible

Consult Stakeholders

- Review new Procedures with all affected for ideas and understanding
- Encourage their input
- Make changes where necessary
- Ask to aid in setting priorities and establish expectations

Finalize and Approve

- Present to Parish Council for review and acceptance
- Publicize changes affecting Stewards
- Create a new manual
- Determine a training date for implementation of new procedures

Review and Revise

- Annually Review Procedures
- Ideally when new Parish Council first convenes
- Revise as needed

Benefits of Policies and Procedures

1. Eliminates “micro-management”
2. Allows for decisions to be made within guidelines
3. Provides constraints to prevent “trial and error” decisions
4. Everyone working has clearly defined roles and responsibilities
5. Sends a “We Care” message

Internet Websites for Sample Policy and Procedure Manuals

<http://www.freechurchforms.com/>

<http://churchadminpro.com/>

<http://www.stewardshipadvocates.org/>

Sources

- <http://churchadminpro.com/policies-procedures/>
- <http://www.stewardshipadvocates.org/>
- “Are your policies and procedures a barrier to your growing company?” Welling, G. Pacific Crest Group http://www.pcg-services.com/resources_pdf/policies-procedures.pdf
- Policies and Procedure Manuals
<http://www.freechurchforms.com/support-files/policyandproceduremanualchurchsample.pdf>
- <http://www.diycommitteeguide.org/resource/how-to-develop-policies-and-procedures>