

# Church Administrative Systems Checklist

*An assessment tool for strengthening the systems that support faithful church administration*

## Use of this resource

Administrative systems are the recurring calendars, forms, workflows, approvals, tools, and records that help a church function with clarity. This checklist is not a legal audit. It is a practical assessment tool for church leaders.

## Purpose

Churches often have good people and good intentions but unclear systems. This checklist helps leaders identify which systems are in place, which need updating, and which have not yet been started. It can be used by staff, deacons, elders, trustees, finance committees, personnel committees, or administrative teams.

## How to Use This Checklist

1. Gather the appropriate leaders for a focused review.
2. Work through each category honestly.
3. Mark each item as In Place, Needs Updating, or Not Yet Started.
4. Assign a responsible person for each item that needs attention.
5. Set a target date for the highest priority items.
6. Review progress at least quarterly until major gaps are addressed.

## Administrative Systems Assessment

### Governance Systems

Administrative System	In Place	Needs Updating	Not Yet Started	Responsible Person	Notes
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<b>Administrative System</b>	<b>In Place</b>	<b>Needs Updating</b>	<b>Not Yet Started</b>	<b>Responsible Person</b>	<b>Notes</b>
Current constitution and bylaws	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Articles of incorporation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Business meeting minutes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Committee or ministry team descriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Defined approval processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Calendar for regular meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Process for reviewing governing documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Official document storage location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

### Financial Systems

<b>Administrative System</b>	<b>In Place</b>	<b>Needs Updating</b>	<b>Not Yet Started</b>	<b>Responsible Person</b>	<b>Notes</b>
Annual budget calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Monthly financial reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Offering counting procedure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Purchase approval workflow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Reimbursement process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Benevolence request process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Designated fund tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Financial review or audit process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Credit card controls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

### Personnel Systems

<b>Administrative System</b>	<b>In Place</b>	<b>Needs Updating</b>	<b>Not Yet Started</b>	<b>Responsible Person</b>	<b>Notes</b>
Current job descriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Hiring process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Personnel files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Staff evaluation process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Time off tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Compensation review process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Employee handbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Volunteer screening process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Background check process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Facility Systems

Administrative System	In Place	Needs Updating	Not Yet Started	Responsible Person	Notes
Facility request form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Master calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Key or access control process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Maintenance request process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Cleaning schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Room setup process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Emergency contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Insurance documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Vendor contact list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Communication Systems

Administrative System	In Place	Needs Updating	Not Yet Started	Responsible Person	Notes
Website update process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Email communication process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Social media approval process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Announcement request form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Branding guidelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Photography and media permissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Crisis communication plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Guest follow up communication process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Ministry Systems

Administrative System	In Place	Needs Updating	Not Yet Started	Responsible Person	Notes
Ministry event planning form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Volunteer recruitment process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Volunteer training process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Attendance tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Guest follow up process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Small group tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Mission trip approval process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ministry calendar planning rhythm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Records and Compliance Systems

Administrative System	In Place	Needs Updating	Not Yet Started	Responsible Person	Notes
Record retention schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Secure storage for legal documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Membership record process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Contribution statement process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Background check records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Incident report files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Insurance policy files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Annual corporate filings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Copyright or licensing documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Technology and Data Systems

Administrative System	In Place	Needs Updating	Not Yet Started	Responsible Person	Notes
Church management software ownership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
User access review process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Password management expectations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Data backup process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Database cleanup process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Online giving administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Technology support request process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Cybersecurity awareness process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Priority Action Plan

Priority Item	Why It Matters	Responsible Person	Target Date	Next Step



## **Suggested First Priorities**

- Address safety, child protection, financial controls, and legal compliance first.
- Clarify approval authority where decisions regularly get delayed or confused.
- Build simple repeatable forms before creating complicated manuals.
- Keep official records in one secure and clearly identified location.
- Review administrative systems annually as part of budget or ministry planning.