Sample Church Procedures Guide

Editable procedure examples churches can adapt for consistent ministry administration

Use of this resource
This sample guide is designed to be copied, edited, and expanded. Churches should adapt each procedure to their own bylaws, staff structure, insurance requirements, technology systems, and applicable law.

Introduction

Procedures help a church carry out its policies and ministry expectations in a consistent way. A policy explains what the church expects. A procedure explains how a regular task is completed. The examples in this guide are intentionally simple so churches can build from them.

Recommended Procedure Format

Section	Description
Procedure Name	Use a clear title that identifies the task.
Purpose	Explain why the procedure matters.
When This Procedure Is Used	Identify the situation or trigger.
Responsible Person or Team	Name who carries out or oversees the procedure.
Steps to Follow	List the actions in the order they should occur.
Forms or Documents Needed	List forms, reports, receipts, emails, approvals, or files needed.
Records to Keep	Identify what should be retained and where it should be stored.
Review Schedule	State how often the procedure should be reviewed.

Approving a Purchase

Purpose

To ensure church funds are spent within approved ministry plans and properly documented.

When This Procedure Is Used

When a ministry or staff member needs to purchase goods or services for church ministry.

Responsible Person or Team

Ministry leader, finance office, and appropriate approving authority.

Steps to Follow

1. Ministry leader identifies the need and confirms that the expense supports approved ministry purposes.

2. Ministry leader confirms that funds are available in the appropriate budget line.

3. If the expense exceeds the approved spending limit, approval is requested from the required staff member, committee, or church body.
4. Purchase is made using an approved payment method.
5. Receipt, invoice, or contract is submitted to the church office.
6. Expense is coded to the correct budget line.
7. Records are retained according to the church record retention schedule.

Forms or Documents Needed

Purchase request, invoice, receipt, contract when applicable.

Records to Keep

Approved request, receipt, invoice, budget coding documentation.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Reimbursing an Expense

Purpose

To provide a clear and accountable process for reimbursing approved ministry expenses.

When This Procedure Is Used

When a staff member or volunteer pays an approved church expense personally and requests repayment.

Responsible Person or Team

Requester, ministry leader, and finance office.

Steps to Follow

1. Requester completes a reimbursement request form.

2. Original receipts or digital copies are attached.

3. Ministry leader reviews the request for ministry purpose and budget availability.

4. Finance office verifies documentation and approval.

5. Reimbursement is processed through the approved payment system.

6. Documentation is filed with monthly financial records.

Forms or Documents Needed

Reimbursement form and receipts.

Records to Keep

Approved reimbursement form, receipts, payment record.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Reserving Church Facilities

Purpose

To coordinate facility use in a way that supports ministry, protects property, and avoids calendar conflicts.

When This Procedure Is Used

When a ministry, member, outside group, or staff member requests use of church space.

Responsible Person or Team

Church office, ministry leader, facilities staff, and approving authority.

Steps to Follow

1. Requester submits a facility request form.

2. Church office checks the master calendar for availability.

3. Request is reviewed for ministry alignment, space needs, setup needs, staffing needs, security needs, and cleaning needs.

4. Approval or denial is communicated to the requester.

5. Approved event is added to the master calendar.

6. Setup, technology, cleaning, and security needs are assigned.

7. After the event, the space is inspected and any issues are reported.

Forms or Documents Needed

Facility request form, room setup form, outside group agreement when applicable.

Records to Keep

Approved request, calendar entry, setup notes, incident or damage report if needed.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Responding to a Facility Problem

Purpose

To make sure facility problems are reported, prioritized, assigned, and completed.

When This Procedure Is Used

When a maintenance, repair, safety, or setup issue is discovered.

Responsible Person or Team

Facilities staff, church office, and appropriate ministry leader.

Steps to Follow

1. Problem is reported through the approved maintenance request process.

2. Request is reviewed for urgency, safety, ministry impact, and cost.

3. Emergency or safety issues are addressed immediately.

4. Work is assigned to staff, volunteer, or outside vendor.

5. Major repairs or expenses are approved according to spending authority.

6. Completed work is documented.

7. Recurring issues are reviewed for possible long term solutions.

Forms or Documents Needed

Maintenance request, vendor quote, purchase approval when needed.

Records to Keep

Maintenance log, work order, invoice, approval record.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Onboarding a Volunteer

Purpose

To help volunteers serve safely, effectively, and in alignment with the church's ministry expectations.

When This Procedure Is Used

When a person begins serving in a ministry role.

Responsible Person or Team

Ministry leader and church office.

Steps to Follow

1. Ministry leader identifies the volunteer role and expectations.

2. Volunteer completes the appropriate application or interest form.

3. Background check is completed when required.

4. References are checked when appropriate.

5. Volunteer receives ministry specific training.

6. Volunteer is introduced to the ministry team and communication process.

7. Volunteer is scheduled and supervised.

8. Ministry leader periodically reviews volunteer effectiveness and fit.

Forms or Documents Needed

Volunteer application, background check authorization, training materials.

Records to Keep

Application, screening record, training completion record, ministry assignment.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Handling an Incident Report

Purpose

To document accidents, injuries, safety concerns, or ministry incidents in a timely and responsible way.

When This Procedure Is Used

When an injury, accident, safety concern, property damage, or serious ministry concern occurs.

Responsible Person or Team

Staff member or ministry leader present, church office, and appropriate supervisor.

Steps to Follow

1. Immediate safety concerns are addressed first.

2. Appropriate staff member or ministry leader is notified.

3. Emergency services are contacted when needed.

4. Incident report form is completed as soon as possible.

5. Witnesses are identified when applicable.

6. Parent, guardian, supervisor, or insurance provider is notified when needed.

7. Report is stored in the appropriate confidential file.

8. Follow up actions are documented.

Forms or Documents Needed

Incident report form, witness statement, photos when appropriate.

Records to Keep

Incident report, follow up notes, insurance communication when applicable.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Preparing for a Business Meeting

Purpose

To help church business meetings be orderly, transparent, and consistent with governing documents.

When This Procedure Is Used

When the church prepares for a regular or called business meeting.

Responsible Person or Team

Moderator, clerk, pastor, staff, and appropriate committees.

Steps to Follow

1. Meeting date is confirmed according to the church bylaws.

2. Agenda items are collected from appropriate leaders, committees, or staff.

3. Required reports are prepared.

4. Meeting notice is communicated according to governing documents.

5. Printed or digital materials are prepared.

6. Presiding officer reviews the agenda before the meeting.

7. Minutes are recorded during the meeting.

8. Approved actions are assigned for follow up.

9. Minutes are reviewed, approved, and stored.

Forms or Documents Needed

Agenda, ministry reports, financial reports, minutes template, voting materials when needed.

Records to Keep

Meeting notice, agenda, reports, approved minutes, follow up assignments.

Review Schedule

Review annually or whenever the related policy, ministry structure, software system, or approval process changes.

Blank Procedure Template

Section	Church Specific Notes
Procedure Name	
Purpose	
When This Procedure Is Used	
Responsible Person or Team	
Steps to Follow	1. 2. 3. 4. 5.
Forms or Documents Needed	
Records to Keep	
Review Schedule	