

# Church Property Management Playbook

## Big Picture: Four Phases

Organize →	Plan and budget →	Implement, monitor, & pay →	Manage, track and report
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### 1) Organize

#### a) People

- i) Management: Create, prioritize, and oversee the plan and budget.
  - (1) Committee with board-approved charter for planning, approvals, accountability.
  - (2) Person with direction, authority, time, access, and resources to implement plan.
- ii) Governance: Authorize the plans and budget in context of overall church direction.
  - (1) Finance Committee: Fit property management into overall budget; provide accounting controls for budgeted and unbudgeted expenditures.
  - (2) Board (Session): Endorse charters of property and finance teams; approve long-term and annual property plans and budget; authorize extraordinary projects.
- iii) Employee, volunteer, contractor, or vendors to implement each task while supervised.

#### b) Scope: All physical aspects of church property including media hardware, installation, and wiring.

#### c) Process and policies

- i) Create schedule of annual and longer-term activities: planning cycle to fit fiscal year.
- ii) Develop work order system and method to implement approved tasks and projects.
- iii) Formulate financial policies on authority for expenditure approvals and thresholds.
  - (1) Overall and/or project-level budget.
  - (2) Unplanned but essential tasks.
  - (3) Set capitalization level for asset depreciation and accounting purposes.
- iv) Produce vendor selection standard and threshold to optimize decision factors.
- v) Adopt conflict of interest policy and monitor/ensure compliance.
- vi) Establish complementary roles and authority for staff and property/finance teams.

#### d) Technology: Determine/use tool set for shared information management and storage.

### 2) Plan and budget

- a) Define strategic facility goals based on church's mission, vision, values, and capacities.
- b) Inspect property and evaluate processes to identify physical assets the church has, maintenance currently being done, and deferred maintenance plan that exists.
- c) Develop capital plan for 5+ year horizon in sync with property improvement initiatives.
- d) Create financial reserve approach for deferred maintenance and amount in each annual budget.
- e) Assess needs → categorized priority list with budgetary cost estimates.
  - i) Categories (somewhat predictable)
    - (1) Maintenance tasks: Scheduled preventative maintenance, recurring annual and seasonal tasks based on life-cycle mgt. plan.
      - (a) Interior, exterior building envelope, landscape/lawn/trees, systems (e.g., electrical, lighting, mechanical, HVAC, roof, siding, safety, plumbing, other infrastructure).
      - (b) Estimated completion time frames.
    - (2) Major repair and improvement projects: long-term replacement and upgrades.
      - (a) Arrange by probability/risk exposure and impact/consequence levels.
      - (b) Rank and prioritize within groups.
      - (c) Approximate start-finish date range.
- f) Allocate a gross amount as buffer in annual budget for unplanned events, i.e., casualty/discretionary maintenance & repair.
- g) Determine how property management fits with site security / emergency response plan.
- h) Propose and support overall budget and detail for committee and board approval.

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## 3) Implement, monitor, and pay

- a) Operationalize the priority list in view of high-level schedule and time requirements, and if internal employee(s) exist, which items can/will be completed with staff resources.
- b) Monitor facility and respond to urgent incidents, unexpected failures, and equipment casualty situations; troubleshoot all areas of responsibility; adjust priorities as needed; obtain approval, notify, and schedule internal staff or preferred vendor.
- c) Initiate approved tasks and projects in coordination with church event schedule.
- d) Launch, oversee, and finalize the vendor selection process ending in contract signing.
- e) Reserve and prepare affected space(s) for scheduled tasks or projects.
- f) Supervise onsite execution of each task and project, troubleshooting as needed.
- g) Approve completion of tasks and projects using agreed-upon quality standards.
- h) Authorize initial, interim, and final invoices in accord with contract terms.
- i) Follow up with vendor on unpaid invoices or delayed remittances.

## 4) Manage, track and report

- a) Maintain appropriate maintenance records.
- b) Manage the master itemized priority list as part of the overall property management budget.
  - i) Recommend unexpected/unplanned tasks or projects during the fiscal year for approval by the authoritative committee(s).
  - ii) Obtain incremental above-budget spending authority as needed and appropriate.
- c) Record actual expenses for each line item and display variance from budgeted amount.
- d) Facilitate joint communication and ongoing decision-making processes and schedule.
- e) Report status by item and overall to managing and governing bodies as shown above.
- f) Summarize lessons learned and appropriate priorities during planning and budget process.