

Church Plant → Particularization

A Legal / Operational Guide

Presenters



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- PCA ruling elder, church administrator, MBA, and business executive
- Served as COO of the EPC national office; was Executive at The Kirk (PCA) in St. Louis
- Technology and management consultant and operations and marketing executive
- Ministry: XP-on-Demand provides personalized professional service to pastors and churches



Keith Moore

- Small business entrepreneur, member of Grace DC church
- Dedicated past 18 years putting business knowledge and experience to work for faith-based non-profits & churches
- Founder & Senior Partner of Auxilio Partners, a consulting and business services partner for churches

THE CHURCH'S RELATIONAL PARADIGM

But I think it is necessary to send back to you Epaphroditus, my brother [community] and fellow co-worker [corporation] and fellow soldier [cause], who is also your messenger, whom you sent to take care of my needs.

Philippians 2:25

COMMUNITY

Primary Metaphor
-Family

CAUSE

Primary Metaphor
-Military

CORPORATION

Primary Metaphor
-Business

A healthy church must balance all three elements

Church Element	Goal	Core Values	Leader Roles
Cause	Mission & Winning	Strength & Commitment	General, <u>Prophet</u>
Community	Fellowship & Care	Love & Acceptance	Father, Brother, <u>Priest</u> , Shepherd
Corporation	Effectiveness & Efficiency	Order & Stewardship	CEO, <u>King</u> , Overseer

Challenge: Leader rarely excels in all three roles, must focus their energy & time.

Objectives

1. Provide a clear picture of church plant stages from conception to particularization and the business needs associated with each stage
2. Discuss various approaches to meeting those business needs

Stages

1. Vision & Preparation [pre-field]
2. Outreach [On-field]
3. Public Worship [Group formation]
4. Launch & Grow [Critical mass]
5. Particularization [Independence]

Organizational Elements

1. Strategic
2. Legal
3. Denominational
4. Communication & Data Infrastructure
5. Financial
6. Donation & People Management
7. Human Resources
8. Risk Management

Church Planting "Playbook"		Stages				
		Vision and Preparation [Pre-field]	Outreach [On-field]	Public worship [Group formation]	Launch & Grow [Critical mass]	Particularize [Independence]
Business / Organizational Elements	Strategic Planning	Field identification & research	Church named (and registered) Assess demographic	Ministry development - small groups, music, children	Create finance committee Continued ministry development	Long-range property plan
	Legal	What will be required in the state	Incorporation, bylaws, EIN (Fed & state) Local attorney & registrations [if any]	Sales/use tax exemption Leases [office/worship space]	Annual / biannual renewals	Annual congregational / corporate meetings
	Denominational	Mission church approval Temp session approval	PCA verification [501(c)(3) group exemption letter], RBI adoption agreements	Member training	Leadership ID and development	Petition to organize Elder nomination, training, and ordination
	Communications & Data Infrastructure	MPDx [CRU] Mother church or sponsor Church name / domain reg	Domain registration Web site - launch site Google for NP registration	Mobile development Social media, Google Ads	Group management [comm/data] Disaster recovery plan	New tools evaluation
	Financial	Develop Budget & Fund Raising goals	Bank account Financial software and services Reimbursements / Credit Card setup	Payables Expanded reimbursements Regular financial reporting	Emergency reserve Investment strategy/policy	Long-range capital plan Banking relationships
	Donation & People Management	Determine fiscal sponsor [MNA] MPDx	ChMS options review Online giving options review	Church online giving Church management system Background checks	First-time givers Non-cash giving options	Cultivate generosity
	Human Resources	Call letter for CP from Presbytery Identify starting point for CP salary	Payroll and benefits for CP EE handbook & HR essentials Employment & volunteer apps	Job descriptions & org chart Onboarding / offboarding processes	EE handbook development Performance review/mgt	Continued refinement
	Risk Management		Insurance (commercial) Child-protection policy Reimbursement / CC policy	Finance policy Sexual misconduct policy	Benefit policies [PT/FT] Investment policies Conflict of interest policy	Record retention policy Periodic policy reviews

Stage 1: Vision & Preparation (Pre-field)

Strategy:	Field identification and research
Legal:	State requirements
Denom:	Mission church approval, Temp. Session
C&DI:	Domain registration, website, online giving
Finance:	Budget and fund-raising goals
People:	Determine fiscal sponsor (MNA if needed)
HR:	CP call letter, salary, benefits

Stage 2: Outreach (On-field)

Strategy:	Assess demographics, Church name
Legal:	Name registered, incorp, bylaws, EIN
Denom:	501c3 group exemption, RBI agreements
C&DI:	Domain reg, website, Google Workspace NP
Finance:	Bank account, credit card, accounting
People:	Online giving, ChMS
HR:	Payroll/benefits, EE Handbook, etc
Risk:	Insurance, child protection, reimbursement

Stage 3: Launch & Grow (Critical Mass)

Strategy:	Ministry development (music, children, etc)
Legal:	Sales tax exemption, building leases
Denom:	Member training
C&DI:	Mobile app, social media, Google Ads, AV
Finance:	Payables mgt, financial reporting
People:	Online giving, ChMS, background checks
HR:	Job descriptions, onboard/exit processes
Risk:	Financial policy, sexual misconduct policy

Stage 4: Public Worship (Formation)

Strategy:	Finance oversight, ministry refinement
Legal:	Annual / biennial corporate renewals
Denom:	Leadership identification and development
C&DI:	Group mgt (email, etc), disaster recovery
Finance:	Emergency reserve, investment strategy
People:	First-time givers, non-cash giving plan
HR:	EE Handbook, benefits, performance mgt.
Risk:	Investment, conflict of interest policies

Stage 5: Particularization (Independence)

Strategy:	Long-range property plan
Legal:	Congregational/corporate meetings
Denom:	Petition to organize; Ruling Elder training
C&DI:	New & existing tools evaluation
Finance:	Long-range capital plan, funding
People:	Cultivate generosity
HR:	Continued refinement and execution
Risk:	Records retention policy, periodic reviews

Ways To Get It Done

1. Church Planter OJT
2. Volunteers
3. Hire in-house admin
4. Partial Outsource
5. Expert Resource / Project Management
6. Complete Outsource

How To Get It Done		Stages	
		Pros	Cons
Options	Church Planter [OJT]	<ul style="list-style-type: none"> Complete control Taps entrepreneurial talent May utilize past experience No extra expense 	<ul style="list-style-type: none"> Distracts from core mission More time on task, less with people May not possess all right skills Learning curve inefficiency Adds stress to challenging job
	Volunteers	<ul style="list-style-type: none"> Good stewardship of available resource Utilize insider(s) with first-hand knowledge and access No extra expense 	<ul style="list-style-type: none"> May lack all right skills Admin volunteer may be lower priority Face trust/accountability dilemma Risk of limited available time on task Could be short-term commitment Harder to "terminate" from role
	Hire In-House Admin	<ul style="list-style-type: none"> Control of employee Provides dedicated focus May be p/t position to fit need Can be insider with church knowledge Could hire externally = more options Reasonable expense 	<ul style="list-style-type: none"> Won't cover all needed skills Provide & pay for office space & tools Member/employee risk More sensitive performance mgt. Difficult or risky to terminate
	Partial Outsource	<ul style="list-style-type: none"> Hire expert(s) for unique capabilities Free up to hire needed ministry staff Moderate control Can be replaced 	<ul style="list-style-type: none"> Won't cover all needed skills Need knack & time to manage one or more vendors Transactional relationship Low or no church knowledge Information access and security risk Perhaps higher expense vs. hiring
	Project Management [Mix & Match]	<ul style="list-style-type: none"> Access expertise where needed Tap proven adaptable resources Get knowledge of integrated church functions and ministries Accomplish right activities at right time Maintain focus/time on mission Get big picture advice about particularization process 	<ul style="list-style-type: none"> Requires time to guide/respond Must know how to utilize consultant Temporary not permanent active support One-time expense = cost/benefit funding Requires local learning curve Still need admin staff or outsource
	Complete Outsource	<ul style="list-style-type: none"> Get instant staff, technology, policies, and procedures No admin gaps to fill internally Access expertise in church operations Known predictable expense No office space or tools needed 	<ul style="list-style-type: none"> Potential loss of local control Expense may seem greater Need vendor utilization skills Culture of church must be taught Different type of staff engagement

Church Planter OJT

Planter does everything, learning while doing

PRO	CON
<p>Complete control</p> <p>Taps entrepreneurial talent</p> <p>May utilize past experience</p> <p>No extra expense</p>	<p>Distracts from core mission</p> <p>More time on task, less with people</p> <p>May not possess all right skills</p> <p>Learning curve inefficiency</p> <p>Adds stress to challenging job</p>

Volunteers

Utilize time & talents of those in the mission church

PRO	CON
<p>Good stewardship of available resources</p> <p>Utilize insider(s) with first-hand knowledge and access</p> <p>No extra expense</p>	<p>May lack all needed skills</p> <p>Admin volunteer may be lower priority vs. people ministry volunteers</p> <p>Trust/accountability dilemma</p> <p>Risk of limited available time</p> <p>Could be short-term</p> <p>Hard to “terminate” from role</p>

Hire in-house admin

Employ a person to handle certain functions

PRO	CON
<p>Control of employee</p> <p>Provides dedicated focus</p> <p>May be p/t position to fit need</p> <p>Can be insider with church knowledge</p> <p>Could hire externally = more options</p> <p>Reasonable expense</p>	<p>Admin functions not as high-priority staffing vs. ministry</p> <p>Won't cover all needed skills</p> <p>Provide office space & tools</p> <p>Member-employee risk:</p> <ul style="list-style-type: none">More sensitive managementDifficult or risky to terminate

Partial Outsource

Contract with vendor(s) to handle certain services

PRO	CON
<p>Hire expert(s) for unique capabilities</p> <p>Free up to hire needed ministry staff</p> <p>Moderate control</p> <p>Can be more easily replaced</p>	<p>Won't cover all needed skills</p> <p>Have to manage vendors</p> <p>Transactional relationship = no commitment to church mission</p> <p>Low or no church knowledge</p> <p>Information access, security risk</p> <p>Higher expense vs. hiring</p>

Expert Resource / Project Management

Engage consultant for expertise / management

PRO	CON
<p>Access expertise where needed</p> <p>Tap proven adaptable resources</p> <p>Get knowledge of integrated church functions and ministries</p> <p>Accomplish right activities at right time</p> <p>Maintain focus/time on mission</p> <p>Get big picture advice about particularization process</p>	<p>Requires time to guide/respond</p> <p>Must know how to utilize consultant</p> <p>Temporary not permanent</p> <p>One-time expense = cost/benefit funding</p> <p>Requires local learning curve</p> <p>Still need admin staff or outsource</p>

Complete Outsource

Contract for comprehensive service package

PRO	CON
<p>Get instant staff, technology, policies, and procedures</p> <p>No admin gaps to fill internally</p> <p>Access expertise in church operations</p> <p>Known predictable expense</p> <p>No office space or tools needed</p>	<p>Loss of local control</p> <p>Expense may appear greater</p> <p>Need vendor utilization skills</p> <p>Culture of church must be taught</p> <p>Different type of staff engagement</p>

Q&A

Thanks

We will email the presentation...

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