Operational Fitness Assessment
For Established Churches

Assessment Approach

1. Best accomplished in live discussion (Zoom works fine) with or without initial scoring by the church leader.
2. Assess each category; check the box indicating the church's current status: Major Issues; Minor Issues; Don't Know; or Seems Okay.
3. Within each category (except those that Seem Okay), specify priority/urgency: Circle top and underline other concerns/opportunities.
4. Identify whole categories or individual items where more in-depth evaluation is needed to best understand challenges/opportunities.
5. Highlight where external resources could help expedite beneficial results (vs. where qualified internal/local help is available and trusted).

Operational Challenges and Opportunities	Description	Major Issues	Minor Issues	Don't Know	Seems Okay
1) Strategic & Operational Alignment	Clear shared mission and vision; goals and success metrics supporting both; core values statement; capacity to execute = strategic processes & resourcing plan (organization and finances); Session / committees / staff synergy & teamwork.				
2) Human Resource Management	Employee policy manual; online payroll system; HR info system (HRIS); position descriptions; organization chart; legal compliance; employee benefit plans; recruiting/compensation procedures; mission-driven performance management.				
3) Financial Stewardship	Financial policy manual; fiscal year and annual budget fits ministry year; donor profile and fund-raising strategy including non-cash giving plan; emergency reserve fund; segregation of duties; vendor and procurement guidelines; contract approval and disbursement authority; online bill-pay and reimbursement system; long-term capital plan; fixed asset tracking plus repair/replacement reserve; accounting and financial reporting system; annual financial review or audit.				
4) Church Management System	Member/visitor including household database; attendance/participation tracking; email/text to church people & groups; unified online/website giving, and text-to-give system integrated with donor & member records; children check-in and check-out; group and volunteer management; event scheduling & registration.				
5) Communications & Technology	Church "brand" identity; vision/mission-aligned communications strategy including oral, print, website, social media, email, text and phone-blast; content management approach; technology strategy; unified voice communications system; virtual meeting tools; shared email and online document systems.				
6) Risk Mitigation	Organizational stewardship plan for the Session/Board; up-to-date articles of incorporation, bylaws and legal structure; religious liberty safeguards; local attorney(s) & insurance broker; commercial & liability insurance; employment & volunteer applications; policies related to conflict of interest, employees, financial administration, sexual misconduct, child protection, data/ID protection, records retention, facility use, weddings, emergency response, and music copyrights.				