

## METRICS AND COMPLIANCE OVERVIEW

Most successful businesses and churches started with a vision based on purpose a strategic plan for long term guidance aligned with the vision, and a detailed plan aligned with the strategic plan for short term guidance. These efforts entail the thought process of what do we want to accomplish and where do we want to get to end up, how are we going to get there and how are we going to overcome known obstacles along the way and have reserves to deal with unknowns that occur in accomplishing pursuit of any vision, plan or budget.

Most successful churches also realize they are going to have to comply with certain requirements. For businesses compliance includes compliance with the Bible, church constitution/bylaws, government regulations, people and money restrictions, and legal risks.

A ship, an airplane and a church have at least 3 things in common: they must have a plan to get from origin to destination, they must comply with basic laws of nature and government regulations and they must make measurements along the way to assure they are on course to get from origin to destination. A church must make measurements (called metrics) to assure they are prudently using their resources to most successfully fulfill their God given purpose and vision within the environment in which they find themselves.

This segment of Transformation Ministries online helps provided member churches reference documents and templates:

1. **Metrics:** Measuring Parameters to Determine Church Progress Towards Vision, Purpose and Predetermined Goals and Objectives. Where, What and How measurements suggestions are presented. Metric parameters covered include attendance, baptisms, tithing, connection groups and Bible studies, volunteers, compassion, congregation satisfaction, community awareness, evidence of spiritual authenticity and comparison with other churches are covered. We need measurements in the form of trend curves and variances to vision, strategic plan, budget to assess where we are and if we need to take corrective action.
2. **Job Products Measurements** . To assure leaders are meeting their job requirements specific parameters should be assessed on a periodic basis. Ten job product measurements are covered: vision achievement, strategic plan aligned to vision, annual budget aligned with strategic plan, budget review, metrics measurements, compliance with limitation/constraints and boundaries, evaluation of staff to assure alignment with vision, comprehensive policies and procedures, personal spiritual development plan and a succession letter by each leader. A recommended Leaders Job Products Report format is also provided. The objective of this report is to provide a visual picture of any exceptions to job products requirements so that the exceptions can be discussed and action plans developed.
3. **Constraints, Limitations and Boundaries** (based upon the Bible, Constitution/Bylaws ad Board/Council). Specifics of biblical, business, financial, employment, communication and security constraints are presented. Also a sample format for reporting Leadership Constraints/Limitations is provided. The objective of the Report is to provide a visual overview of status of plans, progress, what has been completed, approved, and implemented to identify specific areas needing further Leader discussion and action.

*These samples are provided as input to assist you in developing procedures, but are not a substitute for considering the risks at your church and establishing your own policies and procedures to reduce those risks to acceptable levels. Transformation Ministries provides these as a convenience for its churches but directly states to you, the user that Transformation Ministries is not providing these to you as legal advice or even a substitute for legal advice. Use of these samples is at your own risk. Laws change and best practices change, sometimes rapidly. It is your church's responsibility to stay abreast of changes in laws and best practices. It is recommended you always consult with your attorney and/or CPA as part of the process of developing your policies and procedures.*