




DACUM Research Chart for Church Business Administrator

Duties

A  Oversee Financial Functions	A-1 Develop financial policies and procedures	A-2 Interpret financial policies and procedures	A-3 Develop annual budget (e.g., general, building funds)	A-4 Monitor cash flow
	A-10 Process payroll	A-11 Manage bank accounts	A-12 Reconcile bank accounts	A-13 Administer credit accounts (e.g., credit cards, vendor accounts)
	A-19 Coordinate financial audit process	A-20 Maintain financial supply inventory (e.g., deposit slips, checks)	A-21 Promote stewardship initiatives	A-22 Consult with other financial professionals
B  Participate in Planning Activities	B-1 Participate in church visioning process	B-2 Perform needs assessments (e.g., parking, financial)	B-3 Participate in strategic planning	B-4 Prepare financial forecasts and projections
	B-10 Coordinate church advertising/PR			
C  Manage Human Resources Functions	C-1 Conduct staffing needs assessment	C-2 Develop job descriptions	C-3 Conduct job candidate search	C-4 Interview candidates
	C-10 Conduct salary surveys	C-11 Develop salary structure	C-12 Negotiate compensation packages	C-13 Select healthcare providers/plan (e.g., health, dental, disability)
	C-19 Administer accountable reimbursement program	C-20 Coordinate section 125 plan	C-21 Coordinate benefit open enrollment	C-22 Review total compensation package
	C-28 Coordinate staff appreciation/recognition	C-29 Respond to inquiries (e.g., staff, community, congregation)	C-30 Manage staff scheduling	C-31 Coordinate disciplinary process

Tasks

A-5 Oversee offering counting teams

A-6 Deposit financial receipts

A-7 Post financial receipts

A-8 Process electronic transactions (e.g., online giving, EFTs)

A-9 Process accounts payable

A-14 Review church expenditures and income to budget (e.g., monthly, quarterly, YTD)

A-15 Produce financial statements (e.g., P/L, balance sheets)

A-16 Report financial status to committee(s)

A-17 Produce contribution statements

A-18 Process donated securities

A-23 Perform year-end financial functions (e.g., 1099s, close books)

B-5 Participate in ministry evaluation process

B-6 Participate in ministry and program development

B-7 Coordinate church calendar

B-8 Participate in planning for facility expansion

B-9 Participate in staff meetings

C-5 Extend contingent employment offers

C-6 Conduct reference and background checks

C-7 Orient new hires

C-8 Provide employee training (e.g., sexual harassment, computer use)

C-9 Maintain employee handbook

C-14 Determine workers compensation provider/plan

C-15 Administer workers compensation claims

C-16 Interpret FMLA policy

C-17 Administer pension/403(b) benefit

C-18 Coordinate housing allowances

C-23 Maintain personnel files

C-24 Coordinate performance evaluation process

C-25 Provide staff support (e.g., performance counseling, conflict resolution)

C-26 Develop job procedure manuals

C-27 Coordinate staff development (e.g., continuing education, training, team building)

C-32 Conduct termination proceedings (e.g., voluntary, involuntary)

C-33 Coordinate volunteer program

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Duties		←			
D	Manage Church Assets	D-1 Develop usage policies (e.g., property, facility, equipment)	D-2 Administer facility use policy	D-3 Conduct fixed asset inventory	D-4 Maintain fixed asset inventory
		D-10 File insurance claims (e.g., property, casualty, liability)	D-11 Coordinate facility maintenance (e.g., building, grounds)	D-12 Coordinate vehicle maintenance	D-13 Coordinate equipment maintenance (e.g., office, A/V, kitchen)
		D-19 Develop records retention policy	D-20 Maintain church records (e.g., historical, membership, sacramental)	D-21 Provide for secure records storage (e.g., daily, archival)	
E	Supervise Direct Reports	E-1 Conduct staff meetings	E-2 Provide job training	E-3 Conduct performance reviews	E-4 Prioritize work assignments
F	Manage IT Functions	F-1 Develop IT policies and procedures	F-2 Administer IT policies and procedures	F-3 Coordinate software acquisitions	F-4 Coordinate hardware acquisitions
G	Maintain Church Safety and Security	G-1 Develop safety/security policies and procedures (e.g., emergency, disaster, child protection)	G-2 Administer safety/security policies and procedures	G-3 Perform safety audits	G-4 Select safety/security equipment/ systems
H	Oversee Compliance Issues	H-1 Update licenses and permits (e.g., food service, copyright, child care)	H-2 Coordinate development of church governance policies	H-3 Administer church resolutions	H-4 Maintain state licensing (e.g., certificate of continuing existence, statutory agent)
I	Pursue Professional Development	I-1 Identify personal development opportunities	I-2 Participate in professional development activities (e.g., workshops, conferences, seminars)	I-3 Develop professional network	I-4 Pursue professional certification (e.g., FCBA, SPHR)
J	Manage Ancillary Operations	J-1 Review financial aid requests for preschoolers	J-2 Approve letters of call for preschool teachers	J-3 Review grant applications for funding	J-4 Review bookstore revenue/expenses to budget
		J-10 Prepare financial reports for ancillary operations	J-11 Process payroll for day care center/pre-school	J-12 Prepare credit applications	J-13 Deposit receipts from ancillary operations

Tasks

D-5 Develop church operations manual	D-6 Maintain church databases (e.g., financial, membership)	D-7 Select service/supply vendors	D-8 Negotiate service/purchase contracts (e.g., office equipment, fire, telephone)	D-9 Maintain insurance coverage
D-14 Purchase supplies/equipment/ fixtures	D-15 Coordinate real estate purchases/sales	D-16 Coordinate asset disposal (e.g., office equipment, fixed assets, furnishings)	D-17 Plan capital improvements	D-18 Coordinate equipment replacement
E-5 Approve time-off requests	E-6 Process time sheets	E-7 Modify work assignments	E-8 Assign special projects	E-9 Provide staff coaching (e.g., life balance, job performance)
F-5 Coordinate IT support (e.g., service, repair, troubleshooting)	F-6 Coordinate network maintenance	F-7 Coordinate website administration (e.g., maintain, update)	F-8 Develop guidelines for social networking sites (e.g., MySpace, Facebook, blogs)	
G-5 Conduct risk management training	G-6 Coordinate safety/security education	G-7 Plan emergency evacuation drills	G-8 Maintain facility access control	
H-5 Post employment law posters	H-6 Coordinate inspections (e.g., fire, Board of Health)	H-7 Provide legal information (e.g., IRS, political activity restrictions)	H-8 Develop intellectual property policy	H-9 Coordinate records destruction
I-5 Review professional journals and publications	I-6 Participate on boards, committees, and associations	I-7 Participate in spiritual well-being activities (e.g., pray, worship, devotional time)	I-8 Participate in national and local chapter of NACBA	
J-5 Review café revenue/expenses to budget	J-6 Review day care center revenue/expenses to budget	J-7 Participate in board meetings	J-8 Participate in director's performance evaluation	J-9 Participate in budgeting process for day care center
J-14 Evaluate opportunities for other ancillary operations				