

Process Audits: Maximizing Efficiency and Cost



**Serviam
Institute**
I Will Serve.

PRESENTED BY:

The Rev. Dr. Mike Sowards,
Rector

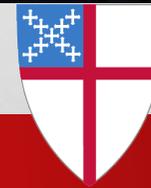


Lisa Reinhardt,
Director of Communications and Parish Operations



St. James' Episcopal Church
knowing and serving God by serving others

3768 Germantown Pike, Collegeville, PA 19426
610-489-7564 www.stjames-episcopal.org



WHAT IS A PROCESS AUDIT?

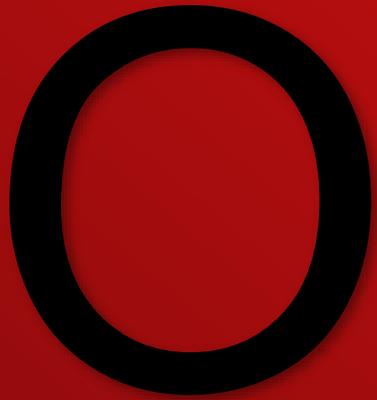
- A process audit is an internal review of daily operations within an organization to identify discrepancies, inefficiencies and single-point failures and to create a process to address said issues.
- How can I perform a process audit at my church?

JUST USE **ROPE** TO HELP YOU TIE UP THE LOOSE ENDS!

R REVIEW

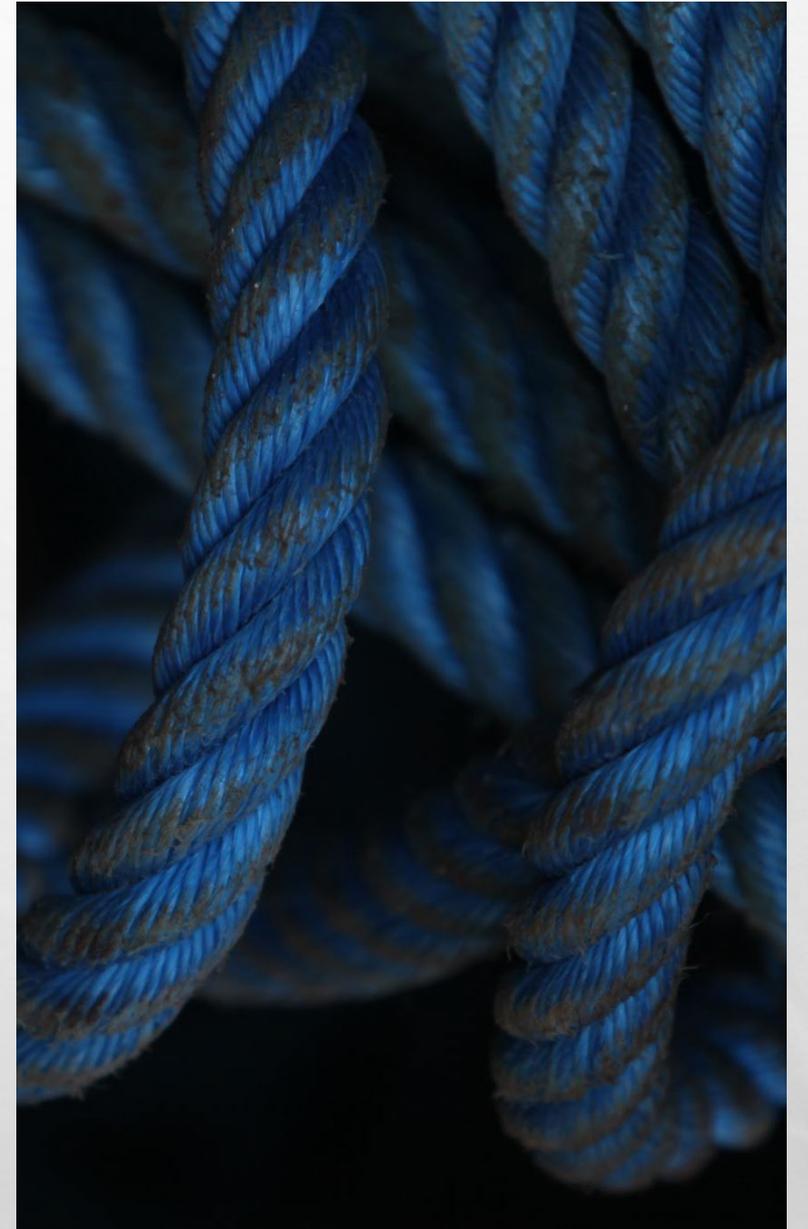
- WHAT ARE YOU CURRENTLY DOING TO PERFORM THIS TASK?
- IS THERE ROOM FOR IMPROVEMENT?
- DOES THE AMOUNT OF TIME AND MONEY USED MAXIMIZE EFFICIENCY?





OUTCOME

- WHAT IS YOUR DESIRED OUTCOME?
- HOW ARE YOU NOT ACHIEVING THIS OUTCOME?
- HAVE YOU HAD DIFFICULTIES IN THIS AREA WITH PROCEDURES?



P PROCESS

- ARE THE PROCEDURES CONSISTENT EVERY TIME?
- IS THERE A SINGLE-POINT FAILURE*?
- CAN THE PROCEDURE BE EASILY FOLLOWED AND REPEATED?

*A single-point failure is defined as an activity or duty that is performed by only one person with no written instructions or cross—trained individuals available to fulfill this duty should the main person be unavailable.



E

EXPENSES

- HOW MUCH ARE YOU SPENDING NOW?
- HOW MUCH WOULD IT COST TO MAKE CHANGES?
- WHAT IS YOUR RETURN ON INVESTMENT?



IT'S JUST THAT EASY TO

ROPE

TOGETHER WHERE YOU ARE AND WHERE YOU
WANT TO BE!

What does a Process Audit look like? Here is a detailed example of how St. James' audited our internal communications...



R REVIEW

- WHAT ARE YOU CURRENTLY DOING TO PERFORM THIS TASK?

Gathering information from emails, slips of paper left on the desk and announcements during services.

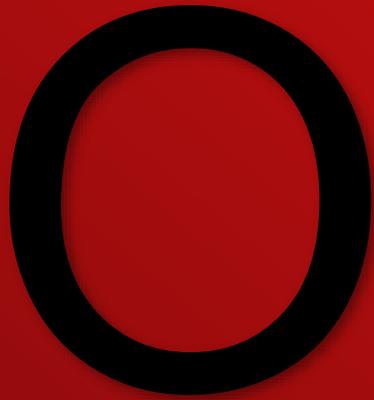
- IS THERE ROOM FOR IMPROVEMENT?

Yes. Many items were lost, and some lacked pertinent information.

- DOES THE AMOUNT OF TIME AND MONEY USED MAXIMIZE EFFICIENCY?

Not always. If more information is needed, extra time may be required to contact the original source to gather information and/or verify details before promoting.





OUTCOME

- **WHAT IS YOUR DESIRED OUTCOME?**

Consistency, accuracy and ease of use for volunteers.

- **HOW ARE YOU NOT ACHIEVING THIS OUTCOME?**

There are too many entry points to gather information, and this can cause loss of pertinent details and announcements not being published in a timely manner.

- **HAVE YOU HAD DIFFICULTIES IN THIS AREA WITH PROCEDURES?**

Yes! Again, not having one location to gather information, having no time constraints for requests to be relayed and having no approval process available created confusion for those wishing to promote an event/activity.



P PROCESS

- ARE THE PROCEDURES CONSISTENT EVERY TIME?

No

- IS THERE A SINGLE-POINT FAILURE*?

Yes, several. For example, our old process relied heavily on one person to have an idea of all the events and activities going on at the church. If an individual made an announcement at one service, but wasn't present at the other services, some of the congregation would not be aware and the events/activities and they would not get promulgated appropriately.

- CAN THE PROCEDURE BE EASILY FOLLOWED AND REPEATED?

No. There are too many ways to request information be advertised and disseminated.

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E

EXPENSES

- HOW MUCH ARE YOU SPENDING NOW?

Cost in this case is minimal. If we print bulletins before a volunteer contacts us about an activity/event, we may need to reprint depending on how time sensitive the communication is.

- HOW MUCH WOULD IT COST TO MAKE CHANGES?

A small amount of time to create a procedure that is consistent, easy to follow, and allows volunteers to write in their own words thereby guaranteeing the accuracy of the communication being published.

- WHAT IS YOUR RETURN ON INVESTMENT?

Allows for all parties involved to have clear timelines and complete information.

OUR COMMUNICATIONS REQUEST FORM

After the Process Audit, it was determined that one standard form needed to be created so that all volunteers and staff can request internal communications consistently, effectively, completely and within deadlines. Our CRF (communications request form) is available on our website and on premise in print form. It clearly defines the information that is needed and establishes parameters for timely dissemination. For example, one parameter is that any article/announcement may only be published for three consecutive weeks to prevent reader fatigue. A new, updated form may be submitted to continue advertising an event/activity but requires new verbiage.

office@stjames-episcopal.org

From: Lisa Reinhardt <office@stjames-episcopal.org>
Sent: Wednesday, March 3, 2021 10:53 AM
To: office@stjames-episcopal.org
Subject: New submission from Communication Request Form

Please Note

Requester

Lisa Reinhardt

Committee/Organization

Director of Communications

Phone

(810) 489-7664

Email

office@stjames-episcopal.org

Event/Meeting Date

03/03/2021

Description of Event/Announcement/Activity for Publication

This is a fantastic way to ensure everyone has a voice, and that voice is consistent with the star

Communication to begin on this date

03/03/2021

Communication to end on this date

03/03/2021

Office Use Only

Status

In Review



LET'S QUICKLY LOOK AT ANOTHER AREA: OUTSIDE CONTRACTORS

This can include lawn maintenance, heating, air conditioning, masonry, cleaning services, electrical, painting, etc.

R REVIEW

- WHAT ARE YOU CURRENTLY DOING TO PERFORM THIS TASK?

We have multiple contracts, but no real time-line for when they need to be reviewed. We also lack a complete list of contractors, sub-contractors and maintenance agreements in one easy-to-use location.

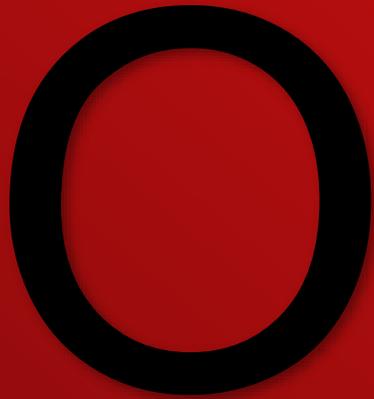
- IS THERE ROOM FOR IMPROVEMENT?

Yes.

- DOES THE AMOUNT OF TIME AND MONEY USED MAXIMIZE EFFICIENCY?

No.





OUTCOME

- **WHAT IS YOUR DESIRED OUTCOME?**

One central location for all contractors' information and clear, defined time-lines for reviewing services needed.

- **HOW ARE YOU NOT ACHIEVING THIS OUTCOME?**

When emergencies occur, we try to find someone local to help, and price can be an issue. We do not consistently re-bid contracts, so prices can be elevated. We do not have one standard protocol for using contractors.

- **HAVE YOU HAD DIFFICULTIES IN THIS AREA WITH PROCEDURES?**

Yes. There can be many different people involved in getting companies to perform services. Without clear parameters different outcomes arise including cost discrepancies and lack of knowledge by the Director of Operations.



P PROCESS

- ARE THE PROCEDURES CONSISTENT EVERY TIME?

No

- IS THERE A SINGLE-POINT FAILURE*?

Yes. In the past, St. James' authorized the Buildings & Grounds (B&G) committee to handle all contracts. When a Vestry liaison from B&G stepped down, no records, contacts or information was passed along. In one case, we failed an inspection because we did not have our smoke detectors checked that year and the office had no record of any company ever doing so. After investigating we found out that a company had been checking the detectors annually and we were only one year behind.

- CAN THE PROCEDURE BE EASILY FOLLOWED AND REPEATED?

No. There are too many ways to hire a contractor which can affect our budget and our consistency and does not allow for one central approval process to occur. The Director of Operations needs to be aware of all contracts and maintenance issues.

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E

EXPENSES

- HOW MUCH ARE YOU SPENDING NOW?

There is no way of telling how much it costs us yearly to not have procedures in place to review bids/contracts.

- HOW MUCH WOULD IT COST TO MAKE CHANGES?

A small amount of time to create a procedure that is consistent, easy to follow and allows maximum savings and time.

- WHAT IS YOUR RETURN ON INVESTMENT?

A great deal of money and time can be saved by having a list of preferred contractors and a centralized place to find the information.

HOW CAN WE ADDRESS THE ISSUES?

As a result of the ROPE process, we have compiled the following to-do list:

- Make a list of contractors in a central location.
- Make a spreadsheet to review bids/contracts in a timely manner.
- Review and obtain maintenance contracts for larger items which will help with costs and time (such as H/VAC and Boiler System).
- Create a “preferred contractors” list for quick repairs or services.
- Create parameters for the various contracts.
- Assemble a small committee to help obtain and maintain these items.

Not only will these steps help improve the property but will also ensure that the money spent is the best option for the church and the church's needs.

SOME AREAS TO ROPE

COMMUNICATIONS

INTERNAL COMMUNICATIONS

EXTERNAL COMMUNICATIONS

ADVERTISING

BULLETINS

MASS EMAILS*

WEBSITES

**Happenings* email goes out weekly, but we also send monthly hardcopies to those who do not have access to the internet.

FINANCE

STRATEGIC PLANNING FOR
BUILDINGS & GROUNDS

BUDGETS

STEWARDSHIP MINISTRIES

OFFICE PROCEDURES*

*Request for Reimbursement

WORSHIP

ALTAR GUILD

WORSHIP LEADERS

CHRISTIAN EDUCATION

USHERS

ACOLYTES

THANK YOU FOR JOINING US TODAY.

ANY QUESTIONS, PLEASE FEEL FREE TO CONTACT US AT:



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