

SOMETHING TO TALK ABOUT

A conversation guide for church leaders

Good Intentions Checklists for Church Boards

I watch the Smithsonian Channel on cable TV. I feel a bit weird mentioning that one of my favorite shows on that channel is *Air Disasters*. *Air Disasters* is a series about, well, air disasters – as in airplane crashes. Specifically, it is about the work of the NTSB (National Transportation Safety Board) and that of other nation's similar entities as they try to determine the causes of aircraft crashes so they can prevent others from happening. I find that kind of stuff fascinating.

Because I travel a lot in this job, people often ask if the show makes me fearful of air travel. The answer is “no” – I actually take comfort in knowing how safe air travel actually is, in large part due to the aviation safety enhancements that have resulted from air disaster investigations. But I do have a healthy respect for what it takes to make our air travel system as safe as it is.

In watching the show, I have learned several aviation maxims that I sometimes use in explaining church leadership concepts to church leaders. Here are a few of them.

- If you are going to experience a flight control or power loss problem, it's better to have it and address it at 35,000 feet than at 1,000 feet. This allows the crew more time to figure out and address the problem. All too often church leaders who know or suspect there is a power-loss problem at their church while figuratively at 35,000 feet don't ask for help or take action to address the problem until they are at 1,000 feet and falling quickly, and they fly their plane right into the ground.
- A pilot that encounters an in-flight emergency has three priorities that are to be addressed in this order: 1) Aviate; 2) Navigate; and 3) Communicate. It makes sense that a pilot needs, first of all, to keep the aircraft flying, then to point it to someplace they want to take it to hopefully land as safely as possible, and then to let others know about it. All the while, the passengers may be in a tizzy and desperate for information, but the flight crew is doing exactly what they are supposed to do – aviate, then navigate, and only then communicate. Oftentimes even air traffic control is kept in the dark while the crew works on the aviate and navigate parts. When a church encounters problems “in-flight,” often the first thing leaders want to do is to communicate or quickly change course. While this may be what needs to be done, I'm intrigued by the idea that first of all we may need to steady our aircraft, and then determine where we need to go, and then communicate what is happening to others. As with any emergency, time is of the essence and we will need to do

these in rapid succession, but we need to know to not spend hours crafting an elegant communiqué while the plane we pilot is plummeting to the earth.

- When pilots encounter a problem, they check their flight manuals and then perform the functions listed on checklists to address the problem. They don't waste a bunch of time guessing about what to do and what order to do it in; rather, they look up the problem and "run the checklists" which are carefully constructed, pre-arranged steps to successfully accomplish what needs to be done to fix the problem. They also, time permitting, will call their company to ask mechanics and specialists directly about their issue rather than doing it all themselves.

Speaking of checklists, pilots do a lot of routine things over and over again. Yet these functions have checklists, too. There are take-off checklists and landing checklists and they refer to and "run" these checklists every time on every flight. Don't pilots know how to take off and land? Why do pilots run these checklists? It is because humans can mentally "check out" and forget important things if they don't have a system by which those things can be remembered. In the aviation environment, missing a single simple step can have catastrophic consequences.

This "routine" checklists idea got me to thinking: Should church leaders have checklists to help them execute on their good intentions? The more I have thought about it, the more I have come to believe that checklists are something for church leaders to talk about and to do.

Here are some ideas for simple checklists you and your leadership team may want to talk about and decide to implement.

- A yearly calendar of reoccurring actions: What things should your leadership team do one or more times every year? Do we have a list of those things to which we can refer to ensure we don't forget something potentially important? Here are some things that you might want to put on such a checklist:
 - Required business meetings for the membership including necessary notification requirements
 - Things done yearly such as reviewing documents related to desired board culture, preparation of the church budget, financial audits/reviews, soliciting nominations or other process for appointing leaders, retreats and training opportunities, special events such as camps, Bible schools, retreats/conferences, approval and adjustments to minister housing allowances, etc.
 - Annual review of missionary and partner ministries (this is best done separate from and before preparing the annual budget)
 - Quarterly budget review. Oftentimes church boards spend time at every meeting discussing the budget although little has changed from month to month. Boards may free time for better use by doing such reviews less often (such as quarterly) and using the freed time for other purposes. If your church's finances are volatile, you may not be able to do this.
 - Times for board/staff collaboration meetings and analyses of trends and opportunities.

- A checklist for board meetings. This checklist might list all the things boards intend to do at their board meetings. A strong agenda format that is used for each “regular” meeting can do the trick. This might include a checklist system to schedule the preparation and distribution of the agenda, the philosophy for ordering the agenda (such as putting the most important things first) and also cover things through the conclusion of the meeting such as preparing and approving the minutes and ensuring they are properly filed. How do we keep track of items tabled for late consideration?
- A checklist for responding to emergencies and crises. Consider checklists for handling injuries occurring during church activities on or off campus; what to do should a fire alarm sound; how to evacuate the buildings; what to do in the event of an allegation of child or other abuse; what to do should a crisis of a more generalized nature emerge; and what to do in planning a church activity. Who needs to know of such checklists, and where should we store them so that there is ready access in case of an emergency?

The value of checklists is that they require some pre-planning and intentionality regarding what needs to be done in a particular situation. To not have intentional pre-planning for these things can result in the situation Israel faced as described in the book of Judges – “everyone did what was right in their own eyes” which is hardly ideal for such things.

The hardest part of using checklists is not creating them. It is sustaining the habit of actually using them every time. Because of this, checklists must be readily accessible and referred to often. This is an aspect of competence in leadership much as flight checklists are an aspect of professionalism in aviation.

There is a risk of becoming needlessly bureaucratic, though, so be careful to remember that a checklist is a pre-planning tool – the checklist is not the end in itself, it is a tool to ensure that we get to the end we desire. And don’t go overboard by having too many of them – create the ones that will be most useful to you. Be flexible when needed and always thoughtfully so.

- What checklists do you have for leaders to use?
- Do we use them?
- Do leaders know that they exist?
- Should some be discarded or updated?
- Would we rather make things up each time and as we go?

Checklists can be an important tool for acting upon our good intentions as leaders, and they are something to talk about. I encourage you to have that conversation.

Let us know if we can help and how your conversation goes. Contact Bob Osborne by e-mail at bob.osborne@efca.org.

This is one of a series of articles intended to facilitate and guide church leaders’ conversations about significant issues that often are not talked about among pastors, boards, and church leadership teams. Prior articles can be found at <https://efca-west.districts.efca.org/something-to-talk-about-archives>.