



Church & Nonprofit HR Check-Up

A practical self-assessment for strengthening your people practices and HR foundation

Churches and nonprofit organizations often manage a unique mix of employees, leaders, contractors, volunteers, boards, ministries, and programs. This check-up helps leadership identify where HR practices may be strong, informal, inconsistent, or in need of closer review.

HOW TO USE THIS CHECK-UP

For each statement, mark Yes, Partially, No, or Not Sure. Focus on patterns rather than a single score. This self-assessment identifies areas that may warrant closer review; it is not a legal opinion or formal compliance audit.

1. Governance, Accountability & Role Clarity

Responsibility for HR decisions and day-to-day people practices is clearly assigned.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

The roles of the board, executive leadership, ministry/program leaders, supervisors, employees, contractors, and volunteers are appropriately distinguished.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Job descriptions are current and accurately reflect duties, reporting relationships, and essential responsibilities.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Leaders know when employment-related concerns should be escalated for HR or legal review.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

2. Policies, Handbook & HR Infrastructure

The organization has a current employee handbook or written personnel policies appropriate to its workforce.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Policies are reviewed periodically and updated when organizational practices or applicable requirements change.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

HR policies and procedures are communicated and applied consistently across departments, ministries, or programs.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Standard HR forms, templates, approval processes, and documentation practices are established and used consistently.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

3. Recruiting, Hiring & Classification

Open positions have defined responsibilities and selection criteria before recruiting begins.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Hiring and interview practices are structured, documented, and consistently applied.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Background screening is conducted when appropriate to the position, population served, and applicable requirements.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Worker classifications (such as employee or independent contractor, and exempt or nonexempt where applicable) are reviewed rather than assumed.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

4. Onboarding, Records & Employee Lifecycle

New employees receive a consistent onboarding and orientation experience.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Required acknowledgments, employment records, and other personnel documentation are collected and maintained appropriately.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Access to confidential personnel information is limited to authorized individuals.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

The organization has defined practices across the employee lifecycle: recruit, hire, onboard, develop, engage, retain, and separate.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

5. Performance, Employee Relations & Leadership

Employees receive clear performance expectations and meaningful feedback.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Managers and ministry/program leaders are trained to address performance and conduct concerns consistently.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

There is a clear process for employees to raise workplace concerns or complaints without relying solely on their direct supervisor.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Workplace concerns and investigations are handled objectively, documented appropriately, and escalated when needed.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Corrective action and separation decisions follow a consistent review and documentation process.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

6. Compliance, Risk & Organizational Readiness

The organization periodically reviews its HR practices for compliance, consistency, and organizational risk.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Required workplace notices, records, and employment practices are reviewed for applicability to the organization.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Leaders understand that nonprofit or faith-based status does not eliminate employment obligations that may apply.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

HR practices are reviewed when the organization grows, restructures, adds locations/programs, or experiences leadership changes.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

The organization knows where to obtain qualified HR and legal guidance when an issue exceeds internal expertise.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Review Your Results

Pay particular attention to items marked Partially, No, or Not Sure. These responses can point to informal or inconsistent practices, unclear accountability, documentation gaps, or areas that deserve a more detailed review.

Mostly Yes	Many foundational practices appear to be in place. Consider whether they are current, consistently applied, documented, and aligned with your organization's needs.
Several Partially / Not Sure	Some practices may exist but be informal, inconsistent, or unclear. A focused assessment can help establish priorities and determine what should be strengthened.
Several No	Your organization may benefit from building or formalizing core systems, policies, training, safeguards, and accountability practices.

A Practical Next Step

Use your responses to identify the areas that deserve attention first. The Capstone HR Collective can help interpret the results, prioritize next steps, conduct a more comprehensive HR assessment, or build the policies, processes, training, and infrastructure your organization needs.

Schedule a consultation: calendly.com/capstonehr

Important: This resource is for educational and informational purposes only. It does not constitute legal advice, a legal opinion, or a comprehensive HR/compliance audit. Requirements vary by jurisdiction and organizational circumstances.