

RESPONSIBILITY CATEGORIES

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- Programs & Neighbors 9/9
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OVERALL PROGRESS 100%

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# Responsibilities Transfer Map

Copy this and share with Sam and the board. This is the complete picture of what moves, what stays, and what needs more conversation.



## STAFF LEADERSHIP

SHARED Hiring — final approval authority  
sam leads, jm ensures fit

SAM TAKES Run weekly all-staff meeting

SAM TAKES 1:1s with Matthew (Operations)

SAM TAKES 1:1s with Jeff (Resident Services)

SAM TAKES 1:1s with Brandy (Development)

SAM TAKES Annual performance reviews

SAM TAKES Staff corrections and discipline

SAM TAKES Staff onboarding new hires

SAM TAKES PTO approvals and scheduling

## FINANCE & OPERATIONS

SAM TAKES Monthly financial review with bookkeeper

SAM TAKES Annual budget creation and approval

SAM TAKES Expense approvals above threshold

SAM TAKES Bank signatory / check signing authority

SAM TAKES Payroll processing (InfiniPay)

SAM TAKES Grant financial reporting and compliance with brandy

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SAM TAKES Annual audit coordination

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SAM TAKES Insurance (Marsh McLennan relationship)

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SAM TAKES QuickBooks / bookkeeper relationship

## FACILITIES & PROPERTY

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SAM TAKES Buildium – property management oversight with Jeff

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SAM TAKES Maintenance vendor relationships With Jeff

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SAM TAKES Facility safety and compliance

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SAM TAKES Lease and property agreements with Jeff

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SAM TAKES Capital improvement decisions

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SAM TAKES Village security (access codes, cameras, incidents)

## PROGRAMS & NEIGHBORS

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JM KEEPS Village Bible study – lead teacher

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JM KEEPS Pastoral visits to neighbors / residents

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JM KEEPS Housing application review – pastoral input

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SAM TAKES Neighbor Care Manager oversight and reporting

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SAM TAKES GleanUp program – operations and scheduling

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SAM TAKES Volunteer recruitment and management with brandy and JM

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SAM TAKES Program metrics and reporting

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TBD Neighbor Covenant administration  
is neighbor covenant coming from Sojourner program? If so yes i dsee myself being involved wtih the Sojourner program.

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TBD Glean Beans – operations oversight

we arent doing glean beans currently

#### DONOR DEVELOPMENT

SHARED Founding donor relationships (top 5)

SHARED Major donor relationships (\$10K+/yr)

SHARED Mid-tier donor stewardship (\$2.5–10K/yr)

SHARED Donor acknowledgment letters  
This needs a whole new system and we all need to participate in it. Board and staff alike.

SAM TAKES Bloomerang CRM — data integrity

SAM TAKES Year-end giving campaign

SAM TAKES Grant research and writing  
with Brandy

SAM TAKES Grant management and compliance reporting  
with Brandy

SAM TAKES Monthly donor newsletter / communications

SAM TAKES Annual report

#### BOARD & GOVERNANCE

JM KEEPS JM's ministry health report to board

SHARED Bylaws and policy maintenance

SAM TAKES Board meeting preparation and packet

SAM TAKES Board meeting facilitation

SAM TAKES Between-meeting board communications

SAM TAKES Annual governance calendar

TBD Board member recruitment and nominations  
this should be handled by the board

#### EXTERNAL PARTNERSHIPS

JM KEEPS Church partnerships (pulpit exchanges, mission)

SHARED TTUHSC healthcare partnership

SHARED City of Midland civic relationships  
I have a long history but Sam needs to know them too

SHARED External speaking and lectures (3-4/year)

SHARED TFE media and public communications  
I'm happy to help as I am comfortable in front of the camera but up to Sam

SAM TAKES Love Midland – meetings and relationships

TBD Charity Tracker – data and reporting  
we dont do much on charity tracker

TBD Family Promise coordination  
we dont work super close with FP and don't need much coordination

 CULTURE & THEOLOGY

JM KEEPS Monthly staff devotional – lead teacher  
Weekly staff devotion (not devotional)

JM KEEPS TFE's theological framework – stewardship

JM KEEPS Theological review of programs and documents

JM KEEPS Culture-carrier in hiring and corrections

JM KEEPS Grant narratives – theological voice

JM KEEPS Deep pastoral care for neighbors – complex cases

JM KEEPS TFE's public theological advocacy

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