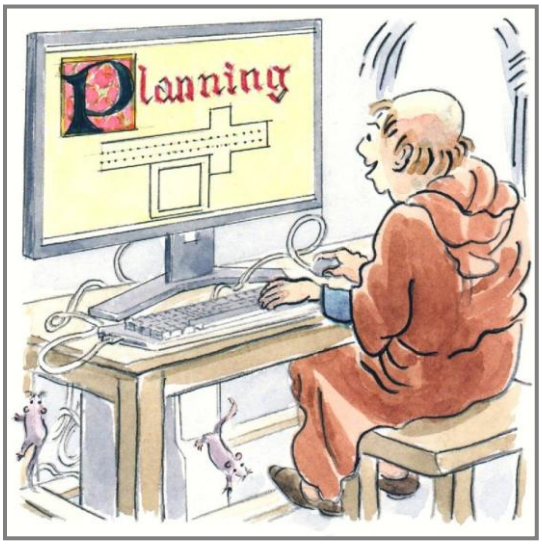
john truscott
church consultant and trainer



Categories for church operations

TN138 Training Notes series: Planning

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The design of a resources filing system, whether for books, hard copy paper, emails or digital files, is an important feature of documentation. The key issue is how you categorise what you have to file. You need a system that makes it easy to locate anything and retrieve it. That is what a filing system is for.

After many years of working in church operations, my categorisation system has been tweaked several times but the basic structure has served me well for many years.

What I describe here is a means of analysing church operations (the focus), but also church life and Christian discipleship (for wider use).

If it helps others, not necessarily to be copied but to be used as an example which can be adapted, I will explain how it works. There is already a short illustration of some of this in a long-standing article on my website[1], but here it is in rather more detail. It is built on a number of principles that I have described elsewhere[2] but some key features are as follows.

1 Each level or layer of categorisation has as few headings as possible. It is then usually obvious which heading anything goes under. The aim is to keep the whole categorisation system as simple as possible.

2 I have three layers for each category, one top level heading and two levels of sub-heads that allow me to break the top level heading into clear sections.

3 The whole idea is to enable me to find items quickly. So my bookcases work to this system as well as all my personal folders and written work. I also have an Access database of all my resources so that if I cannot think which category something has been filed under I can quickly find its category on the database. But most of the time it should be obvious.

[1] See Article A1, *Pass or file? How to get excited about filing!*
[2] See Article A37, *Sorting out your study. Part 2: the stuff in the room.*

Years ago Michael Saward, an Anglican Vicar, devised a pre-digital filing system for clergy which many used. It was, however, very thorough and had categories that most people would never need. In this system I have aimed for something simple. It will not be right for Ministers but I am hoping it will suit Operations Managers and Church Administrators, and other church staff may find that they can use parts of it. See what you think.

1 Top level categories

I have two main categories for my work which is where most things are, two others to encompass church life/issues and a fifth one for personal discipleship. So, first:

- Operations – people
- Operations – organisation

Then my other top level categories are:

- Church life
- Church issues
- Discipleship

So my work and faith books, my cuttings, articles and blogs are filed under one of only five categories. The advantage of this is that it is obvious in which of the five something will be filed. The slight disadvantage is that there are occasional items that do not sit neatly in one of these five. Many items have a secondary category because they naturally fit into more than one of these. But the operations categories are always the primary ones.

2 Second level categories

The next level gives the main groupings that cover all my needs. So, for my two work categories, these are:

Operations - people

P1	Leadership	Operations for leaders
P2	Management	Operations for managers
P3	Structures	Operations for trustees

Operations - organisation

O1	Planning	Operations for planners
O2	Communication	Operations for communicators
O3	Administration	Operations for administrators

Those six headings, I find, successfully cover all aspects of church operations. I admit that the split into two is somewhat arbitrary as they are all to do with people and all are concerned with organisation. There is, however, a slight distinction between the two in my mind. I might arrange it differently if starting all over again but I have tweaked things over the years rather than taking up time in any major reorganisation. Filing must remain a servant of finding and I need to minimise time put into it.

I use the six headings together as a breakdown of the topic of church operations. My website resources are all categorised under these six headings. These six provide a simple but comprehensive categorisation of what church operations is all about.

The three other top line categories are then broken down as follows.

Church life

L1 God-ward
L2 Us-ward
L3 Out-ward

These three I hold are the key purposes of any church and I use this division for my Church Health Model and in much of my thinking about church purpose and vision. So L1 covers matters concerned with our relationship with God, L2 our life as Christian community, and L3 is all about outreach, service and the culture in which we live.

There is of course overlap with my six operations categories already listed and many items I have are coded with both a P or O category and, secondly, an L one. So an item on small group structures in a church fits primarily in P3 (and, as stated above, the P and O categories will always be primary) but also in the L2 category. I am concerned in my particular ministry with how you structure home groups more than on materials that you might study in home groups. Others would see things the other way round.

Church issues

C1 Health
C2 Debates
C3 Overview

Needs here will vary person to person, but my work is concerned with church health (C1), I need to keep abreast of and understand various points of disagreement in church life (C2), and C3 is concerned with understanding the Church in the UK and globally.

Discipleship

D1 Study
D2 Bible
D3 Life

This is more of a personal category for myself as a Christian disciple.

3 Third level categories

These then break down one more time (omitting some detail) in the following way. By this stage the detail is designed to match my work as a church consultant and trainer and is given here as an example, not as any recommendation that this is the only way to subdivide everything!

For example, P1 is not designed to cover leadership as such, so there is only one category on this (P11 below) but more as my topic of operations impacts on leaders (hence P12, P13 & P14).

These are the categories I use in hard-copy filing for my bookshelves, my box files (for cuttings and articles) and my digital files for what I write.

P Operations - People

P1 Leadership

P11 The leader (role, character, training…)
P12 Self-awareness (style, personality, collaboration…)
P13 Work management (time, priorities, diary…)
P14 Life management (stress, family, burnout…)

P2 Management
P21 The manager (skills, developing staff, supervision…)
P22 Worker care (staff support, appraisal, HR…)
P23 Teamwork (group dynamics, conflict, personality types…)
P24 Volunteers (volunteering, all member ministry…)
P25 Membership (church members, integration, leaving…)

P3 Structures
P31 Governance (trustees, charity law, church structures…)
P32 Employment (staffing, selection, legislation…)
P33 Leadership structures (eldership, PCCs, staff…)
P34 Staff payment (stipends, salaries, expenses…)
P35 Meetings (chairing, secretary, committees…)

Throughout this system you will note that different categories under different headings link up. So P23 on teamwork has obvious links with P35 on meetings and you might find it more natural to put P35 into the P2 system. In one sense this really does not matter too much, provided you end up with something that makes sense to you so that you can find things quickly.

O Operations - Organisation

O1 Planning
O11 Planning process (plans, strategies, aims…)
O12 Review and evaluation (audit, health-checks, failure…)
O13 Vision, values and purpose (statements…)
O14 Organisation (structure, change management, projects…)

O2 Communication
O21 The communicator (networks, copyright, messages…)
O22 Print/website (newsletters, email, social media…)
O23 Presentations (drama, speaking, PowerPoint…)
O24 Public Relations (media, press releases, advertising…)

O3 Administration
O31 Church business (gifts of administration, church management…)
O32 Finance (accounts, budgets, Treasurer…)
O33 Buildings (sound, heat, maintenance, safety…)
O34 IT (internet, tech, software, scams, GDPR…)
O35 Desk management (equipment, records, files…)
O36 Office (Church Administrators, office set-up…)

So, I have now covered the six main aspects of church operations, divided into 28 third level groupings.

L Church life

L1 God-ward
L11 Liturgy (services, intercessions, all age…)
L12 Music/worship (choirs, music groups, styles…)
L13 Teaching (sermons, programmes, bookstall…)
L14 Discipleship (holiness, prayer and Bible reading…)
L15 Stewardship (lifestyle, giving, debt…)
L16 Renewal (gifts, vision, passion…)

L2 Us-ward
L21 Church life (membership, hospitality, discipline…)
L22 Practical care (visitors, bereavement, counselling…)
L23 Young people (children, teens, families…)
L24 Small groups (home groups, nurture, relationships…)
L25 Body ministry (gifts, mobilisation, training…)
L26 Visitor care (welcome, integration…)

L3 Out-ward
L31 Mission-shaped (outlook, planting, attitude…)
L32 Outreach (courses, print, programmes…)
L33 Culture (emerging issues, cultural relevance…)
L34 Networks (workplace, compassionate ministries…)
L35 Global mission (agencies, giving, vocations…)

This category covers the three main dimensions of church purpose and life. There will be overlap with the previous two sections (for example, L15 Stewardship links to 032 Finance), but L categories will always be secondary.

C Church issues

C1 Health
C11 Church fitness (signs of health, assessment models…)
C12 Size and growth (models, small churches, rural churches…)
C13 New structures (fresh expressions, post-Christendom issues…)
C14 Role of Ministers (vocation, clergy issues, patronage…)

C2 Debates
C21 Doctrinal issues (other than the following)
C22 Charismatic/reformed issues
C23 Differing traditions
C24 Gender issues
C25 Sexuality issues

C3 Overview
C31 Anglican (dioceses, deaneries, parishes, synods…)
C32 Non-Anglican (Baptist, Methodist, independents…)
C33 UK church (overview, statistics, trends…)
C34 Mission agencies (structures, overview…)

This category covers my interest in how churches function and what is happening on the UK church scene. Those who are deeply involved in church life will need further categories. These, for operations staff, will always be secondary to a P or O topic that also fits here. For example, an item on types of church leaders might be P11 but have C14 as a secondary classification.

D Discipleship (personal)

D1 Study
D11 Doctrine
D12 Apologetics
D13 Trinity / Old Testament
D14 Jesus Christ / New Testament
D15 Church and history

D16 Ethics / holiness
D17 Leading / preaching
D18 Liturgical / song books

D2 Bible
D21 Bible overall
D22 OT commentaries
D23 OT other
D24 NT commentaries
D25 NT other
D26 Study notes

D3 Life
D31 Bible and prayer
D32 Holy living
D33 Mission
D34 Relationships
D35 Humour
D36 Biography

This category is used for my personal life as a Christian worker rather than for my professional work as such. So this category does not appear on my website, but it does cover many of my Christian books, cuttings, articles and blogs. This is just an outline of the system. A Minister would need something more detailed than this.

My categorisation for emails and digital files for assignments is somewhat different because here the key to finding items will be the name of the client I ran a training day for or the church whose consultancy review I carried out. Each one will have covered many different aspects of my subject so the system described here would not make sense.

On my website items I file in my personal folders by their reference number (so TN1, then TN2, etc. for my Training Notes) rather than on their subject category.

If it helps you to rethink your own filing system, even if you end up with something different from this which fits your specialism, that will be fine. This has been quite a specialist topic to write about. Thanks for getting this far!

These notes are available at https://www.john-truscott.co.uk/Resources/Training-Notes-index then TN138. See also Articles A1, *File and seek,* and A37, *Sorting out your study part 2: the stuff in the room.* For a more detailed look at church life categories see Health-checks HC4 & HC5, *Church Health Review,* and a simplified form of this at Article A35, *Mapping your church.*

John's resources are marked for filing categories of Leadership, Management, Structures, Planning, Communication and Administration. File TN138 under Planning (with a link to Administration).

John Truscott, 24 High Grove, St Albans, AL3 5SU
Tel: 01727 568325 Email: john@john-truscott.co.uk Web: https://www.john-truscott.co.uk