

Your Values Based Benefits Assessment

What we will need from you

WHY WE ASK

Our goal is an honest picture of how your pay and benefits reflect what you believe about caring for people, and a realistic roadmap your team and board can carry out. We only ask for what we need, and we keep it light for a busy ministry staff.

HOW IT WORKS

1 Sign the confidentiality agreement

Before any information is shared.

2 Share your information

Two surveys and eight documents.

3 Talk with us

After we review your forms, a conversation to hear your story and clarify anything missing.

4 Receive your report

Findings session, then a clear, phased roadmap for your team and board.

WHAT WE WILL NEED

A Two surveys

- Organization profile (about 25 minutes), best completed by your senior leader
- Benefits and policy survey (about 30 minutes), which your senior leader is welcome to hand to an administrator or finance lead. Both surveys can be saved and finished later

ABOUT 55 MINUTES

B Eight documents

- Staff list by role, with pay and full or part time status (our template, no names)
- Health plan documents and enrollment counts
- Retirement plan summary
- Employee handbook
- Mission, vision, and values
- Organization chart
- A few sample job descriptions, including a minister
- Other benefit descriptions

ABOUT 1 TO 2 HOURS TO GATHER

C Two conversations

- Pay philosophy conversation with your senior and finance or administrative leaders (60 minutes), scheduled after we review your forms
- Findings session to walk through your results (60 to 90 minutes)

ABOUT 2 TO 3 HOURS

Total time for your team: about 4 to 6 hours over 3 to 4 weeks. Your senior leader's part is about 85 minutes, and an administrator or finance lead can handle the rest. **Want us to look deeper?** That is optional. Share more, such as past pay studies, and we will include it.

Protected
BY AGREEMENT

Your information stays yours

You sign a confidentiality agreement before sharing anything. We ask for roles and pay, not names, and we never need Social Security numbers, birth dates, or any individual's medical information. Your information is used only for your assessment and deleted when you ask.

Ready to begin?

Reply to confirm and we will send the confidentiality agreement and a secure link for your documents.

benefitsassessment@sonvio.com
sonvio.com

Sonvio also offers a health plan for faith-based organizations. This assessment stands on its own and does not require enrollment in any Sonvio plan. It is advisory and is not legal or tax advice.