STEWARDSHIP MINISTRY ASSESSMENT TOOL

Understanding your stewardship ministry

In the life of a congregation, generosity and stewardship come in many forms as individuals offer their time, gifts and resources. This assessment tool is based on the Everence stewardship wheel.



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Stewardship ministry assessment tool

For churches to strengthen their stewardship ministry

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Introduction

In the life of a congregation, generosity and stewardship come in many forms as individuals offer their time, gifts and resources.

1. This assessment tool is based on the stewardship wheel on the cover. Through this guidance, Everence aims to support your congregation and assess how you ask for, give, receive and use the money entrusted to the church – with the hope your attenders do the same.
2. Having a pastor, advocate, stewardship/finance team and other church leaders help fill out this assessment may give you a broader perspective on your congregation's strengths and areas for growth. Pray for God's guidance as you work through these questions.
3. Note that some questions are asked to help Everence better understand congregations and their needs. We want to learn from you in order to better meet your stewardship needs. Questions are asked in a way that allows us to compare data year over year.
4. Feel free to contact your Everence stewardship consultant if you have questions or need assistance in this effort.

Stewardship advocates

Everence offers two versions of this assessment:

- **This PDF version is comprehensive.** It provides an introduction and educational information, can be shared with others to allow easier collaboration, and allows you to save your answers on a computer or hard copy version. *Since some questions may need discernment and discussion, we suggest you fill out this version first.*
- **The online version is abbreviated.** It includes only a short introduction and the questions. It's the version you use to submit your church's completed assessment answers to Everence. It must be submitted by Sept. 1 annually for the church to be eligible for $1,000 in matching Sharing Fund grants the following year. Unless marked optional, all questions require answers for the assessment to be submitted successfully. You will need your congregation ID to fill out this form. A link to the online version is available at **everence.com/partners**.

Church information

Please estimate your answers below if exact figures are not readily available. Enter N/A if estimates are not possible.

Church name _____ Everence congregation ID number _____

Stewardship advocate's name_____ Email_____

Pastor's name (who has stewardship role)_____ Email_____

Your stewardship consultant's name _____

Average number of weekly attenders ☐ 50 or fewer ☐ 51-75 ☐ 76-100 ☐ 101-150 ☐ 151-200 ☐ 201-300 ☐ 301 or more

Number of attenders in each age group _____ 0-21 _____ 22-40 _____ 41-60 _____ 61 and older

Number of households/families_____ Number of households/families who gave to the church this past year_____

Do you offer benefits to your pastoral staff?

☐ Yes, we offer full health and retirement, etc. ☐ Yes, we offer some benefits ☐ No

Annual budget_____

At the heart of the Stewardship Ministry Wheel

The Everence Stewardship Ministry Wheel is a comprehensive guide for cultivating congregational generosity and deepening the understanding and practice of faithful stewardship. At Everence, we believe the work of planning, telling, teaching, inviting, and thanking is rooted in a growing faith in Jesus Christ. It's framed by the understanding that everything in our care belongs to God (Psalm 24:1) and aimed at developing a vibrant stewardship ministry that supports and sustains each church's mission.

As you complete the rest of this assessment, consider how your congregation participates in God's plan, purposes and work in the world as you integrate your faith and finances.

A. Telling our story

Telling your church's story can strengthen your stewardship ministry. It may include preaching or testimonies from people whose lives have been touched by your ministry and faith community. People give of themselves and their resources when they are inspired about your vision, mission and what you do, as well as how they've been blessed by meaningful relationships. Consider how you share your vision for ministry with attenders and individuals outside your congregation.

Select one answer that best applies.

1. Which of the following statements would describe your congregation's vision and mission?

☐ It's clear and known by our attenders.
☐ It may need to be better communicated to our attenders.
☐ We don't have a vision and/or mission statement.

Which of the following statements would describe your congregation's vision and mission?

☐ It's accepted and embraced by our attenders.
☐ It's not something we say or think about often.
☐ It needs to be reviewed and maybe updated.

If you have one, briefly share your congregation's mission and vision statement.

2. About how often do people share stories/testimonies about the impact of your church's ministries?

☐ Every week ☐ Once a month ☐ Several times a year ☐ No formal sharing at this time

3. About how often do people share stories about their financial stewardship journey?

☐ Every week ☐ Once a month ☐ Several times a year ☐ No formal sharing at this time

4. Which of the following statements describes your church's experience with a narrative budget (one that uses stories to promote the different parts of your budget)?

☐ We considered it and decided to pursue it. We have one in place now.
☐ We implemented it but changed our minds. We do not have one in place now.
☐ We considered it and decided not to pursue it. We do not have one in place now.
☐ We have not considered it but might be interested in the future.
☐ We have not considered it and are not interested.

5. Would more resources on "telling your church's story" be helpful to your church?

☐ Yes ☐ No ☐ Maybe later

B. Teaching biblical stewardship

Churches can offer theological perspectives on stewardship in worship and practical financial education to help people consider their faith and values as they make responsible financial decisions. Money management is a spiritual discipline that invites us to trust and depend on God, rather than only ourselves.

Select one answer that best applies.

1. In this past year, how often has financial stewardship or generosity been included in worship or a sermon?

☐ Regularly ☐ Once in a while ☐ Once a year ☐ Rarely or never

2. Which of the following statements describes your church's approach to financial education and formation for attenders?

☐ We regularly offer financial education ☐ We offer it once in a while
☐ We have never offered it but would like to ☐ We have never offered it and don't plan to

3. Would more resources on "preaching and teaching stewardship" be helpful to your church?

☐ Yes ☐ No ☐ Maybe later

C. Inviting participation

Some people think of stewardship primarily as managing money well. However, it also encompasses a spirit of generosity that shapes and expands how we share God's love. Inviting people to generous giving invites them to deepen how they practice their faith and participate in God's work in the congregation. Consider how your congregation invites attenders to give both to the church and the world.

Select one answer that best applies.

1. Does your church publicly invite people to give to the congregation?

☐ Yes ☐ Yes, but sparingly ☐ No, but we would like to start ☐ No

2. When do you publicly invite people to consider giving to the congregation?

☐ During worship ☐ Outside of the service
☐ Both inside and outside of the service ☐ We don't publicly offer opportunities for giving

3. Does your pastor privately invite individuals to give to the church?

☐ Yes, the pastor exclusively does this ☐ Yes, along with another person
☐ No, but someone else does ☐ No, we don't have a person assigned to this role

4. What giving options are available at your church?

☐ In-person only ☐ Digital-only ☐ Both in-person and digital gifts are received

5. How often do you provide special giving opportunities outside your regular offering?

Examples: Mutual aid for attenders in need, community/global needs, youth projects or trips, facility needs and improvements, capital campaigns, endowments, etc.

☐ Weekly ☐ Monthly ☐ Annually ☐ Regularly ☐ As needs arise ☐ We don't do this

6. Does your congregation offer attenders to consider any special gifts?

Examples: Investments (stock/bonds), land/property, qualified charitable distributions/IRA gifts, estate gifts, MyNeighbor credit card, etc.

☐ Yes ☐ No, but we are interested in learning more ☐ No

7. Would more resources on "asking for gifts and encouraging generosity" be helpful to your church?

☐ Yes ☐ No ☐ Maybe later

D. Thanking with gratitude

Thanking givers is a common practice among nonprofits. However, in the church, it isn't as common to show gratitude for the gifts people share. Consider how your church shows gratitude to those who financially support the work of your congregation.

Select one answer that best applies.

1. Does your church celebrate generosity and show gratitude to givers?

☐ Yes ☐ Yes, but not as often as we'd like ☐ No, but we would like to start ☐ No

2. How often does your church celebrate generosity and show gratitude to givers?

☐ Regularly ☐ Annually ☐ Quarterly/Monthly ☐ Weekly ☐ Rarely/Not at all

3. How much access does a pastor have to individual giving records in order to thank givers?

☐ Full ☐ Some ☐ No access

4. Would more resources on "thanking givers" be helpful to your church?

☐ Yes ☐ No ☐ Maybe later

E. Planning for the future

Congregations have funds, facilities and people to care for over the long term. Planning for the church's future involves building and maintaining a broad foundation that provides financial stability, respects the needs of pastors and staff, as well as monitors facility needs. Planning also involves understanding and accepting change while trusting we are all in God's hands.

Select one answer that best applies.

1. Does your church have a detailed line-item annual budget (expenses and income)?

☐ Yes ☐ No

2. Does your church have a regular budget-creation process that you follow from year to year?

☐ Yes ☐ No

3. In the most recent fiscal year, did your church meet its planned budget?

☐ Yes, we exceeded ☐ Yes, we met budget
☐ No, we experienced a deficit ☐ We don't have a budget

4. In the most recent fiscal year, did your church raise money for special projects outside of your regular budget?

☐ Yes, we exceeded our goals ☐ Yes, we met our goals
☐ Yes, but we were under our goal ☐ We didn't attempt to raise any money for special projects

5. In the most recent fiscal year, did your church or members make contributions to a congregational endowment?

☐ Yes ☐ No, but we have one ☐ No, we don't have an endowment

6. Which of the following statements were true for your church this past year?

☐ Giving increased over the prior year.
☐ Giving stayed the same as the prior year.
☐ Giving decreased over the prior year.

7. Which of the following statements describes your church's attendance trends?

☐ Growing ☐ Declining ☐ Stable

8. Would more resources on "planning for the future" be helpful to your church?

☐ Yes ☐ No ☐ Maybe later

F. Next steps

As you complete this assessment, you may be thinking more deeply about areas that your congregation is doing well in stewardship ministry and areas for growth. Listen to God's invitation to strengthen your stewardship ministry in the future. You may have identified one or two priorities for the year ahead.

1. What else would you like your stewardship consultant to know about your church?

- What does your church do well?
- Where does your church see room to grow?

2. What has your experience with Everence Stewardship Partners reporting (newsletters, quarterly reports, this or previous assessment tools) been like?

3. At Everence, we are always striving to help our congregations in a way that is helpful to them. How familiar do you think you (advocate) and/or your stewardship leaders are with the financial tools Everence offers to empower financial well-being for faith-inspired living? For example: Banking, investing, retirement, financial planning, insurance, charitable giving, etc.

1 Not familiar at all 2 Not very familiar 3 Somewhat familiar 4 A little bit familiar 5 Very familiar

4. How could Everence connect with/serve your congregation more effectively?

5. Would you be interested in a follow-up stewardship consultation with an Everence professional to discuss your submitted responses and additional ideas and best practices to deepen your stewardship ministry?

☐ Yes ☐ Maybe ☐ No

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