

# Stewardship ministry assessment tool

For churches to strengthen their stewardship ministry



## Introduction

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In the life of a congregation, generosity and stewardship come in many forms as individuals offer their time, gifts and resources. With this assessment tool, Everence® aims to support congregations in working on the financial aspects of stewardship.

With this tool, your congregation can assess and deepen how it asks, gives, receives and uses the money entrusted to it – and how you can help your attenders do the same.

Use this tool creatively to consider your own context. 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.

Note that some questions are asked to help Everence better understand congregations and their needs. We want to learn from you and share what's working with all churches.

Feel free to contact your Everence stewardship consultant if you have questions or need assistance in this effort.

## Stewardship advocates

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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 Aug. 31 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. A link to the online version is available at [everence.com/partners](http://everence.com/partners).

## Church information

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

Today's date \_\_\_\_\_ Everence congregation ID number \_\_\_\_\_ Church name \_\_\_\_\_

Stewardship advocate's name \_\_\_\_\_ Email \_\_\_\_\_

Pastor's name (who has stewardship role) \_\_\_\_\_ Email \_\_\_\_\_

Your stewardship consultant's name \_\_\_\_\_

Annual budget \_\_\_\_\_

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 \_\_\_\_\_

## Jesus at the center

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Christians acknowledge that stewardship is grounded in our faith in Jesus. At the heart of being faithful stewards and generous givers is seeing our giving as a response to our generous God. Our giving is a visible expression of making Jesus central in our lives.

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.

### 1. Telling your church's story

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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.

Which of the following statements would describe your congregation's vision and mission? (Select all that apply).

- |  |  |
|--|--|
| <input type="checkbox"/> It's clear and known by our attenders.              | <input type="checkbox"/> It likely needs to be reviewed and maybe updated. |
| <input type="checkbox"/> It's accepted and embraced by our attenders.        | <input type="checkbox"/> We don't have a vision and/or mission statement.  |
| <input type="checkbox"/> It may need to be communicated better to attenders. | <input type="checkbox"/> Other (please specify: _____ )                    |
| <input type="checkbox"/> It's a written statement.                           |  |

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

Briefly, what ministries help your congregation fulfill its mission? (Optional)

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

If there is sharing, where do people share their stories? (Select all that apply).

- In worship    In small groups/Sunday School    In church communication  
 Other (Please specify: \_\_\_\_\_ )

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

Are you interested in learning more about how to share stories?

- Stories about church ministries    Stories about the stewardship journeys of individuals    Not at this time

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

- |  |   |
|--|---|
| <input type="checkbox"/> We regularly share one with attenders.                                  | <input type="checkbox"/> We considered it, but decided not to pursue it.            |
| <input type="checkbox"/> We update it regularly/annually.  | <input type="checkbox"/> We have not considered one.                                |
| <input type="checkbox"/> It seems to inspire attenders.  | <input type="checkbox"/> We would like information/counsel about narrative budgets. |
| <input type="checkbox"/> We tried it; it was time consuming or didn't seem to inspire attenders. | <input type="checkbox"/> Other (Please specify: _____ )                             |
| <input type="checkbox"/> We may need to find ways to improve it.                                 |   |

## **2. Preaching and teaching stewardship**

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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.

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

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

Explain why/why not. (Optional)

Would stewardship-related worship/sermon resources be helpful to your church?

- Yes    No    Maybe later

Which of the following statements describe your church's approach to financial education and formation for attenders? (Select all that apply).

- |  |   |
|--|---|
| <input type="checkbox"/> We regularly offer financial education.       | <input type="checkbox"/> We don't offer Sunday school/formation time for adults.              |
| <input type="checkbox"/> We offer it once in a while.                  | <input type="checkbox"/> Each Sunday school/formation group decides its own formation topics. |
| <input type="checkbox"/> We have never offered it.                     | <input type="checkbox"/> Other (Please specify: _____ )                                       |
| <input type="checkbox"/> Our attenders have not shown enough interest. |   |
| <input type="checkbox"/> We don't have the resources to offer it.      |   |

If you provide financial education, who shares responsibility for it? (Select all that apply).

- |  |   |
|--|---|
| <input type="checkbox"/> Sunday school/formation/small group leaders | <input type="checkbox"/> Pastor                         |
| <input type="checkbox"/> Stewardship/finance team/treasurer/trustees | <input type="checkbox"/> Stewardship advocate           |
| <input type="checkbox"/> Deacons/deaconess                           | <input type="checkbox"/> Other (Please specify: _____ ) |
| <input type="checkbox"/> Elders/Church Board                         |   |



Who would invite people individually to give to the church? (Select all that apply).

- Pastor    Stewardship/financial leader    Another person    We don't have a person assigned to this role

How much access does that pastor have to individual giving records?

- Full    Some    No access

How do you regularly receive people's gifts? (Select all that apply).

- Offering during worship    Debit/credit cards  
 Donation box    Phone app  
 Kiosk    Other (Please specify: \_\_\_\_\_ )  
 Online giving/ACH (direct bank transfer)

Would you be interested in more information about online giving and vendors?

- Yes    No

Do you provide any of the following special giving opportunities? (Select all that apply).

- Mutual aid for attenders in need    Capital campaigns  
 Community/global needs    Endowment  
 Youth projects/trips    We don't have these special giving opportunities  
 Future ministry dreams    Other (Please specify: \_\_\_\_\_ )  
 Facility needs and improvements

If you provide these special giving opportunities, how often?

- Weekly    Monthly    Annually    Regularly    As needs arise

Please select any of following special gifts that your congregation already invites people to consider and/or those you would like to learn more about. (Select all that apply).

	Invite these gifts	Would like to learn more
Investments (stocks/bonds)	<input type="checkbox"/>	<input type="checkbox"/>
Land/property	<input type="checkbox"/>	<input type="checkbox"/>
Qualified charitable distributions/IRA gifts	<input type="checkbox"/>	<input type="checkbox"/>
My Neighbor credit card	<input type="checkbox"/>	<input type="checkbox"/>
Life insurance policies	<input type="checkbox"/>	<input type="checkbox"/>
Will/estate gifts	<input type="checkbox"/>	<input type="checkbox"/>
Other special gifts	<input type="checkbox"/>	<input type="checkbox"/>
None of the above	<input type="checkbox"/>	<input type="checkbox"/>

## 4. Thanking givers

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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.

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

- Regularly    Annually    Quarterly/Monthly    Weekly    Rarely/not at all

If you do, how? (Select all that apply).

- In worship    Note of thanks  
 Other verbal affirmation    At special events  
 Year-end giving statements    Other (please specify: \_\_\_\_\_)

If you do, who expresses thanks to givers for their gifts? (Select all that apply).

- Stewardship/finance team    Pastor    Church leader

Are you interested in learning more about expressing thanks to givers?

- Yes    No    Maybe later

## 5. Planning for the future

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Like many other organizations, 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.

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

- Yes    No

If yes, which of the following steps are included in your budgeting process? (Select all that apply).

- We consider the goals of our congregation.    We don't have other steps in our process.  
 We review activities funded last year and discern if they require funding this year.    Other (please specify: \_\_\_\_\_)  
 Attenders approve the budget annually.

If no, which of the following statements describe your budget situation and/or perspective? (Select all that apply).

- We haven't considered budgeting.    We would be interested in information/counsel on budgeting.  
 We have weekly designated giving.    Other (please specify: \_\_\_\_\_)  
 We give to pay expenses and our pastor.  
 We don't have the resources to create a formal budget or maintain bookkeeping.

Which of the following statements were true for your church this past year? (Select all that apply).

- |  |   |
|--|---|
| <input type="checkbox"/> Giving increased over the prior year.     | <input type="checkbox"/> Reduced our expenses.              |
| <input type="checkbox"/> Giving stayed the same as the prior year. | <input type="checkbox"/> Accessed savings to pay our bills. |
| <input type="checkbox"/> Giving decreased over the prior year.     | <input type="checkbox"/> Increased debt to pay our bills.   |
| <input type="checkbox"/> Experienced a financial surplus.          | <input type="checkbox"/> Other (please specify: _____)      |
| <input type="checkbox"/> Met our financial needs.                  |   |

Briefly, what have you learned from the past year's budget process that will influence your financial decisions in the future?  
(Optional)

Which of the following people are responsible for the church budget, manage finances or give input/help decide how to use church funds? (Select all that apply).

- |   |  |
|---|--|
| <input type="checkbox"/> Pastor                                 | <input type="checkbox"/> Church leadership team        |
| <input type="checkbox"/> Church treasurer/accountant/bookkeeper | <input type="checkbox"/> Other (please specify: _____) |
| <input type="checkbox"/> Finance/stewardship team               |  |

Does a pastor serve on the stewardship/finance team?

- Yes    No

Which of the following statements describe reserve or emergency funds at your church? (Select all that apply).

- |  |  |
|--|--|
| <input type="checkbox"/> We don't have reserve or emergency funds. | <input type="checkbox"/> In an investment account.                       |
| <input type="checkbox"/> In a bank checking/savings account.       | <input type="checkbox"/> In an endowment.                                |
| <input type="checkbox"/> In a money market account.                | <input type="checkbox"/> We would like to learn more about fund options. |

If you received a significant undesignated gift (above regular giving), how would you decide how to use that money?

- |  |  |
|--|--|
| <input type="checkbox"/> We have a regular practice/process for special gifts. | <input type="checkbox"/> We would decide when it happens.  |
| <input type="checkbox"/> We have an older process but need to update it.       | <input type="checkbox"/> We aren't sure; we would like to learn more about how to create a policy/process. |
| <input type="checkbox"/> Finance/stewardship team would decide.                |  |

Which of the following statements describe how your facility fits your current/future ministry needs? (Select all that apply).

- |                                     |   |
|-------------------------------------|---|
| <input type="checkbox"/> Too small. | <input type="checkbox"/> Has adequate space for our ministries. |
| <input type="checkbox"/> Too large. | <input type="checkbox"/> Other (please specify: _____)          |

Do you rent or own your building?

- Rent    Own

If you own your building, how is your building used during the week? (Select all that apply).

- Used by pastors/staff.
- Used for meetings/gatherings of our ministry teams/church leaders/other groups.
- Occasionally is utilized by activities of our ministries/other groups.
- Partially utilized by daily/weekly activities of our ministries/other groups.
- Fully utilized by daily/weekly activities of our ministries/other groups.
- Used by groups that help financially contribute to its upkeep.
- Our building is mostly empty during the week.

Which of the following statements about financial practices are accurate about your church? (Select all that apply).

- Two unrelated people are present to count offerings.
- We ask for receipts/documentation when reimbursing pastors/staff and all others for expenses.
- The person who signs checks is a different person than the one who maintains financial records.
- We regularly provide a written financial statement (income/expense) to our attenders.
- We are up to date on our tax filings and payments.
- Our leaders sign a conflict of interest policy (affirming they will not approve expenses that they or their family/friends/associates would benefit from).
- We follow other best practices for accounting/transparency with funds entrusted to us.
- We would be interested in information/counsel on church financial management.
- We don't follow any of these financial practices.
- Other (Please specify: \_\_\_\_\_)

Which of the following features reflect compensation for your pastors and staff? (Select all that apply).

- No specific compensation; we encourage a bi-vocational approach.
- Base salary on love offerings.
- Base salary on whatever our giving allows.
- Follow our denomination/network's guidelines.
- Follow other pastor compensation guidelines.
- Include health insurance.
- Include life insurance.
- Include retirement savings contribution.
- Provide housing allowance or parsonage.
- Provide professional/education allowance.
- Provide sabbaticals.
- Other (please specify: \_\_\_\_\_)

Which of the following statements describe your church's attendance trends in recent years?

- Growing
- Declining
- Stable

Which of the following factors have affected your attendance in recent years? (Select all that apply).

- Worship and/or sermons that attract new attenders.
- Ministries and activities that attract new members.
- Population/demographic changes in our community.
- COVID pandemic.
- Changing marriage/childbirth patterns.
- Divisions caused by belief or political differences.
- Transition in leadership or ministries.
- Our attendance hasn't been affected by specific factors.
- Other (please specify: \_\_\_\_\_)



## Summary

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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.

Briefly, where are you experiencing success in your stewardship ministry?

Briefly, where do you see opportunities for growth in your stewardship ministry?

Are there areas discussed in this assessment that you would like to work on? (Select all that apply).

- |   |   |
|---|---|
| <input type="checkbox"/> Telling our church story.                    | <input type="checkbox"/> Thanking givers.         |
| <input type="checkbox"/> Preaching and teaching stewardship.          | <input type="checkbox"/> Planning for the future. |
| <input type="checkbox"/> Asking for gifts and encouraging generosity. | <input type="checkbox"/> None of these areas.     |

What are one or two activities you could engage in to address the area you chose above? (Optional)

## Comments

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Please name any areas you would like information or assistance on from Everence. (Optional)

Please share any feedback you have about this assessment process.

Thank you for taking time to complete this assessment! We hope it gave you an opportunity to reflect on your stewardship ministry today and to consider possible ideas to help you grow and develop as a congregation in the future. Advocates, please review this tool's introduction above for guidelines on submitting your completed assessment.