"FAITH & MONEY"

Stewardship Assessment

Please use the following questions to evaluate and review what relevance is placed on stewardship within your church/congregation.

General Stewardship

1. **How does our congregation define stewardship?**

2. **How is stewardship integrated into our worship and education experiences?**

3. **Is our congregational culture of giving based on joy and abundance? Or do we focus on guilt and need?**

4. **How does the pastor define his/her role in stewardship ministry?**

5. **How do members' experiences or beliefs shape their understanding of stewardship? Of tithing?**

6. **Who in the church structure is responsible for stewardship ministry?**

   Finance committee

   Stewardship committee

   Church Staff

   Other ______________________

Personal Stewardship

7. **Are resources on personal finances and stewardship provided to the congregation?**

8. **Are members invited to see financial management as a spiritual discipline and encouraged to be joyful givers?**
   (See Personal Reflection Resource)

9. **Do members receive regular statements of giving for their record-keeping? How often?**

10. **Are annual stewardship programs offered? Please describe the past 3-5 years and results.**

11. **Are members invited or reminded to consider planned gifts in their estate planning or to manage current tax burden?**

Congregational Stewardship

12. **Are congregational leaders aware of the most important missions and ministries of the congregation? The vision or mission priorities?**

13. **Are congregational leaders aware of the net worth and total assets of the church?**

14. **How is the annual budget funded each year?**

    What are the income sources for the past three year?

    How are reserves/carry over and restricted funds tracked?

15. **If the church holds assets, where are they invested?**

    Does that investment manager practice socially responsible investing?

    How are the returns managed?

    Do documentation/policies exist for the management of assets?

16. **Is the church regularly inviting members to include the church in their wills or estate planning?**

    Are records kept on any reported planned gifts and a documentation process in place?