

Financial Health Assessment Worksheet

Thank you for taking the Financial Health Assessment! Following is a worksheet that can help guide you when you take the Financial Health Assessment online. Once you have completed this worksheet, please set up your account on the website and input the numbers below.

Questions

Please indicate your position with this congregation (Check all that apply):

- ☐ Pastor
- ☐ Interim Pastor
- ☐ Associate Pastor
- ☐ Elder
- ☐ Treasurer
- ☐ Church Member
- ☐ Member of Stewardship/ Generosity or Finance Committee (or equivalent)
- ☐ Member of another Standing Committee
- ☐ Other _____

How long have you been in your current role (in years)?

- ☐ Less than 1 year
- ☐ 1 Year to 3 Years
- ☐ 3 Years to 5 Years
- ☐ Over 5 Years

Who is currently providing your congregation's pastoral leadership?

- ☐ Installed Pastor
- ☐ Interim Pastor
- ☐ Stated Supply
- ☐ Designated Pastor
- ☐ Commissioned Lay Pastor
- ☐ Other _____

How many pledging or giving units are in your congregation? For purposes of this assessment, a "giving unit" is a uniquely identifiable contributor. It could be one person, a couple, or an entire family.

What is your average weekly worship attendance?

Approximately what percentage of your congregation participates in giving?
(Choose One)

- ☐ Greater than 90%
- ☐ 90%-75%
- ☐ 74%-50%
- ☐ Less than 50%

What were total contributions for the past calendar year?

- ☐ \$0 - \$24,999
- ☐ \$25,000 - \$99,999
- ☐ \$100,000 - \$599,999
- ☐ \$600,000 - \$1 million
- ☐ \$1 million - \$2.9 million
- ☐ \$3 million - \$4.9 million
- ☐ \$5 million or more

How much of last year's total contributions were pledged income?

- ☐ 90% or greater
- ☐ 75 - 90%
- ☐ 50 - 75%
- ☐ 25 - 50%
- ☐ 0 - 25%

Does your congregation have a written, annual stewardship plan in place?

- ☐ Yes
- ☐ No

Is this plan shared with the congregation on an annual basis?

- ☐ Yes
- ☐ No

In the past year, how often has stewardship and/or generosity been a topic in a sermon?

- ☐ 0
- ☐ 1 - 2
- ☐ 3 - 5
- ☐ 5 - 10
- ☐ 10+

Does your congregation regularly insert written information on stewardship and giving in the weekly bulletin and other communication vehicles?

- ☐ Yes
- ☐ No

Does your congregation have a website?

- ☐ Yes ☐ No

Can congregation members make a gift online through your website?

- ☐ Yes ☐ No

Is your annual budget mostly funded by one or just a few individuals?

- ☐ Yes ☐ No

Is your congregation currently operating at a budget deficit?

- ☐ Yes ☐ No

How long have you been operating at a deficit?

- ☐ Less than 1 year
☐ 1 year to 3 years
☐ 3 years to 5 years
☐ Over 5 years

Does your congregational have an annual review of its finances?

- ☐ Yes ☐ No

Who in your congregation is responsible for leadership in the area of stewardship & generosity? (Choose one.)

- ☐ Stewardship/Generosity Team
☐ Finance Team
☐ Staff
☐ Session
☐ None

What portion of the budget goes to support outside mission work?

- ☐ 0%
☐ 1-5%
☐ 5-7%
☐ 8-10%
☐ 11-15%
☐ 18-22%
☐ 22% or more

How open do you feel your congregation is to considering new ideas about giving and new approaches to stewardship/generosity? (Choose the option that best describes your current situation)

- ☐ Very open - We actively seek out new ideas & approaches from other congregations
- ☐ Somewhat open - We discuss new ideas on a regular basis, and sometimes try them
- ☐ Not very open - We do the same thing every year
- ☐ We do not talk about money

Which of the following areas do you feel are most important for your congregation to focus on moving forward? (Choose all that apply)

- ☐ Building an endowment
- ☐ Conducting capital campaign
- ☐ Building a culture of generosity
- ☐ Retiring debt
- ☐ Meeting annual operating budget
- ☐ Other

How many different bequests did your congregation receive in the last year?

- ☐ 0
- ☐ 1-3
- ☐ 3-5
- ☐ 5-10
- ☐ 10+

Does your congregation have a planned giving program that routinely educates membership on areas such as bequests & trusts?

- ☐ Yes
- ☐ No

Does your congregation have endowments? (For this assessment, an endowment is defined as a restricted body of funds where only interest and earnings are used for operational purposes.)

- ☐ Yes
- ☐ No

If the answer is no, you may skip the next question.

What is your average annual spending rate of your endowments?

- ☐ Less than 5%
- ☐ 5%-9%
- ☐ 10%- 24%
- ☐ 25% or greater

Does your congregation have cash reserves?

- ☐ Yes ☐ No

As a percentage of your total operating budget, would your reserves be?

- ☐ More than 100%
☐ 75-100%
☐ 50-75%
☐ 25-50%
☐ 10-25%
☐ 5-10%
☐ less than 5%

Has your church had a capital campaign any time in the last 10 years?

- ☐ Yes ☐ No

If no, you may skip the following question.

Did you reach your campaign goal?

- ☐ Yes ☐ No

In the past five years, has your church received any gifts in the form of real estate, stocks or other non-liquid assets other than cash?

- ☐ Yes ☐ No

If no, you may skip the next two questions.

Approximately how many such gifts have been received?

- ☐ 1 to 3
☐ 3 to 5
☐ 5 or more

What was the total value of the gifts?

- ☐ \$0 - \$24,999
☐ \$25,000 to \$100,000
☐ \$100,000 to \$500,000
☐ \$500,000 to \$1 million
☐ \$1 million or more

Would you like a Presbyterian Foundation representative to contact you to discuss the results of this survey?

- ☐ Yes ☐ No