

Financial Foundations Year-Round Stewardship Plan: Self-Assessment

A successful year-round stewardship plan will address these key areas. Rank your church in how well you are doing in each area. Circle the number for what best describes your church.

ENGAGING	Building relationships and meaningful service will strengthen a person's commitment to God's work within the Church.				
1	2	3	4	5	Score
We plug in the committee vacancies with anyone who has a pulse.	We use committees as the main way for people to serve and build relationships.	We encourage people to engage in many different ways to serve and build relationships through the ministries and vision of the church.	Same as 3, plus we work with new members to see where their talents enhance the ministry of our church. Our pastor builds deeper relationships with key leaders.	Same as 4, plus we have clear plan for how all people can take the next step in service and relationship.	5 4 3 2 1

INSPIRING	People may give out of obligation, plus they will give generously to a mission that changes lives.				
1	2	3	4	5	Score
We shame people into giving to "keep the lights."	We have a compelling purpose that is written on the bulletin.	We know our purpose and share stories of how we see the love of Jesus lives within the ministries of our church.	Same as 3, plus we have a strategy to help us see more and more lives changed.	Same as 4, plus seek opportunities to share stories and celebrate when lives are changed and the love of Jesus is spread throughout the ministries of our church.	5 4 3 2 1

TEACHING	When someone understands how God wants them to use their money, their faith and generosity will grow greatly.				
1	2	3	4	5	Score
Money or generosity is rarely mentioned in our sermons	We preach about giving once a year (Pledge Card Sunday).	We preach one sermon series about giving each year.	We preach one sermon series about giving each year and offer classes to address money issues (FPU).	Same as 4, plus we use the offering or other times in the service to teach the discipleship of giving and generosity.	5 4 3 2 1

ASKING					
Asking forces people to consider their giving and pushes people to decide. The #1 reason people don't give is they are not asked.					
1	2	3	4	5	Score
We never ask people to give or encourage them to think about giving.	We have the Finance Chair ask people to give more to bail us out when the budget is tight.	We challenge people to grow in generosity once a year (Pledge Card Sunday).	We occasionally challenge people to grow in their giving. When we're in need, we'll ask individuals to help us out.	Same as 4, plus we connect members with their giving capacity, their talents, and match their ministry interests to the needs of the ministry in the church.	5 4 3 2 1

THANKING					
Appropriately recognizing and thanking those who give encourages more giving.					
1	2	3	4	5	Score
We never thank or recognize people for their giving... accept maybe at their funeral.	We give a generic thank you on the giving statement or from the pulpit or at Charge Conference.	We thank people generically as a shotgun approach. A one-size fits all.	We personalize and tailor our thank yous based on giving level and individual thank you notes or letters.	We thank people regularly in person, with personal notes, etc. We celebrate giving through stories and testimonies in worship, printed materials, and social media.	5 4 3 2 1

REPORTING					
Reporting and transparency as you strive for your mission builds trust.					
1	2	3	4	5	Score
We never report on finances or how money is used. It's none of their business.	We report finances at Charge Conference and Admin Council.	We regularly report in the newsletter the finances and positive stories that resulted from our ministry.	We report the giving results in a number of different ways and make financial reports readily available at the appropriate level of detail.	Same as 4, plus we also report to individuals that have a vested interest in certain projects and ministries. We're transparent and share the truth of our finances.	5 4 3 2 1

Highest Score _____ **Lowest 2 Scores (a)** _____ **(b)** _____

Celebrate the highest ranked of the above areas knowing these are the areas you are doing well. For the areas which need some attention: Spend time at the next meeting to decide what one or two changes you can make to improve in these areas and begin to plan on how those changes will be made in the upcoming year.