



Church Financial Campaign Service Stewardship Assessment Survey

Church Name _____

Street Address _____

City, State Zip _____

Phone _____ Email _____

Number of members at the end of last year _____

Number of households _____

Number of pledges..... _____

Please indicate who helped complete this questionnaire. (Check *all* that apply.)

- .a Pastor
- .b Stewardship or financial committee chairperson
- .c Current officer
- .d Member
- .e Other (please specify): _____

Has the church conducted a capital campaign within the past five years? .a Yes .b No

Are you still in the midst of a capital campaign payout period? .a Yes .b No

Self-Assessment Instructions

This assessment consists of thirty-nine multiple choice questions. Please indicate the response that most closely fits your church’s current policies and procedures regarding annual stewardship practices. Check only *one* answer for each question.

The final four supplementary questions will assist in developing key database information for your congregation and future participants.

Please return this questionnaire directly to:
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Congregation Self-Assessment Survey

Role of the Pastor

1. How often does your pastor or an ordained staff member participate in meetings of the Stewardship Committee or other committee that deals with stewardship issues?
 - .a Not at all
 - .b Seldom (about once per year)
 - .c Occasionally (50% of meetings)
 - .d Regularly attends all meetings

2. When ordained staff attends Stewardship Committee meetings, what is his/her role?
 - .a Leads biblical/theological reflection and brings Session directives to the committee
 - .b Serves as resource person and brings Session's directives to the committee
 - .c Serves as resource person or moderator only
 - .d Is only an observer

3. How often does your pastor preach about the theology of stewardship and possessions?
 - .a Not at all
 - .b Seldom (once or twice per year)
 - .c Occasionally (three to four times per year)
 - .d Regularly (many sermons have a stewardship focus)

4. Do the pastor's sermons on stewardship make a connection between possessions and member giving?
 - .a The connection is made very clearly
 - .b Generally
 - .c Vaguely
 - .d Not at all

5. When church committees are developing their plans for the following year, how does the pastor or ordained staff participate in these meetings?
 - .a Directly involved as part of planning teams or committees
 - .b Directly involved and helps interpret rationale for decisions at Session meetings
 - .c Attends meetings but not actively involved with decision making
 - .d Not at all

6. To the best of your knowledge, does your pastor know which members pledge or give financially to the annual stewardship program?
 - .a This information is not given to the pastor
 - .b The pastor does not want to see this information
 - .c Pastor knows who pledges or gives but not the amount
 - .d Yes, pastor knows who gives and knows the frequency and amount

Role of the Session

7. Does the Session set financial priorities for church committees about mission, ministry and program?
- .a Session relies on committees to work out priorities and submit budget requests
 - .b Session provides committees with guidelines and direction and asks committees to submit budget requests
 - .c Session sets goals for stewardship campaign and priorities for funding each area of ministry and outreach
 - .d No direction provided
8. How often are biblical/theological reflections about money/possessions a part of the regular Session meeting?
- .a Not at all
 - .b Seldom
 - .c Occasionally
 - .d Regularly
9. What is your congregation's budget development process?
- .a Usually an individual prepares the budget using percentage "add-ons" from the previous year's budget
 - .b Usually a budget with percentage "add-ons" from the previous year is prepared and is discussed in committee and brought to Session
 - .c A "zero based" budget is developed where each committee submits a budget based on predetermined Session priorities
 - .d We do not prepare budgets
10. How often is member giving dealt with as part of Session meetings?
- .a Not at all
 - .b Seldom
 - .c Occasionally
 - .d Regularly
11. Does your Session appoint a committee to handle the congregation's annual stewardship efforts?
- .a The session names a stewardship chairperson in a proscribed manner
 - .b A stewardship-like committee exists, but it deals mostly with budget matters
 - .c A stewardship committee exists that deals with member giving
 - .d No such committee exists

Role of the Stewardship Committee Chairperson

12. Did the person appointed as Chair of the Stewardship (or similar) Committee receive any orientation or written documentation as to what his/her responsibilities were?
- .a Received written description of expectations
 - .b Received written description of expectations and a personal orientation to duties
 - .c No written description provided, but new chair observed duties of past chairpersons
 - .d None
13. How are members of the Stewardship (or similar) Committee recruited?
- .a A blanket invitation is issued and those who volunteer for the committee are appointed
 - .b Members not serving on other committees are asked to serve on the committee
 - .c Members with specific gifts and talents for this work are recruited
 - .d No such committee exists

Role of the Stewardship Committee

14. When does your congregation's Stewardship Committee begin to discuss the annual financial stewardship program?
- .a Within one month of the start of the annual commitment process
 - .b Within six months of the start of the annual commitment process
 - .c We have a year-round stewardship emphasis
 - .d Have no annual commitment process
15. Does the committee plan the stewardship emphasis on an annual basis or for a longer period?
- .a Annual planning
 - .b Three to five year stewardship strategy
 - .c No annual commitment planning – we do the same thing every year
 - .d No annual stewardship emphasis
16. How does your committee develop the stewardship program's calendar?
- .a Based on Session's directive
 - .b Using input from pastor(s) and/or staff
 - .c Using input from pastoral staff, Session and denominational stewardship resources
 - .d Committee sets the calendar on its own
17. Are congregation members encouraged to participate in church programs and/or ministries that utilize their specific gifts and talents?
- .a Members' specific gifts and talents are reviewed and members are given options as to how their talents can be best utilized
 - .b When help is needed a special call goes out for assistance
 - .c Committees intentionally recruit members to assist in committee tasks
 - .d A few people are the ones who always participate
18. What is your congregation's normal process for sharing budget information with the congregation?
- .a A narrative budget is shared with the congregation
 - .b We distribute a narrative budget at a congregational meeting with discussion at that time
 - .c A spreadsheet-type budget is mailed to each member
 - .d No budget is presented to the congregation

Growing Generous Givers

19. When your congregation conducts new member classes is time allocated for learning about Christian stewardship?
- .a Information about participation opportunities is usually shared, but there's no talk about money
 - .b Stewardship of time, talents, and treasure is mentioned in the class
 - .c The stewardship chair or a designated representative has a significant allocation of time to develop new members' understanding of stewardship and our congregation's expectations of members
 - .d Stewardship is not a part of new member classes or no new member classes are held

20. Is stewardship education part of an ongoing curriculum through your church's Christian education programming each year?
- .a Not a chance
 - .b We've tried this in the past, but given up on this objective
 - .c Stewardship occasionally gets mentioned in the context of other classes, but not as a stand-alone topic, and financial stewardship is seldom mentioned
 - .d We conduct at least one stewardship education class for the congregation each year and vary the topic or style to better suit our members each year
21. Do your members respond to annual pledging as a spiritual discipline?
- .a Less than half of our members believe that pledging is a tool for the leadership to make a financial plan for the coming year and their pledge is helpful to that end
 - .b More than half of members pledge to the annual commitment process, and a number of them understand pledging as a spiritual discipline for their own benefit and growth
 - .c We conduct a commitment process occasionally but not every year. It is usually tied to a specific financial need of the congregation
 - .d None at all – we don't ask members for an annual commitment
22. Which of the following two statements better fits your congregation's values?
- “We believe honoring individuals publicly for their contributions makes some members feel guilty and results in improper honoring or pride in oneself. Therefore we do not publicly acknowledge individuals for their contributions.”
- “By honoring individuals publicly for their contributions, we use their witness to teach others about stewardship on a regular basis.”
- .a Congregation values first quote strongly
 - .b Congregation values first quote somewhat
 - .c Congregation values second quote somewhat
 - .d Congregation values second quote strongly
23. Is proportionate giving emphasized in your stewardship education and commitment process?
- .a Members give a set amount but occasionally give an additional increment when their income goes up significantly
 - .b Most members give based on their past practices
 - .c Most members give a percentage of their annual income, and their pledges directly reflect changes in their income
 - .d Proportionate giving is not emphasized

Members' Values

24. Does church leadership have a systematic method for learning the congregation's values and priorities regarding existing programs and ministry?
- .a We have done a mission study or congregational survey in the last five years
 - .b We did a mission study of congregational values and priorities more than five years ago
 - .c We have a process that continually updates the mission study information to keep it current
 - .d We have never done a mission study or surveyed members' values and priorities

25. How are decisions made regarding the funding of existing programs and ministries?
- .a Decisions are made by an individual, the pastor, or a committee with no input from the congregation
 - .b Decisions are made by session with little or no input from the congregation
 - .c Decisions are made as a result of a mission study of the congregation's values and priorities regarding national and local mission support which includes a survey of the congregation in the last five years
 - .d Congregation has been surveyed (and informed), there is a process in place that continually updates the mission study information to keep it current, and this information is used in such decisions
26. How does the session prioritize when reductions in the annual budget need to be made or when "either/or" choices need to be made?
- .a We do not budget
 - .b The Session makes these decisions in a designated meeting for this purpose
 - .c A member or a committee of Session makes these decisions
 - .d A committee makes recommendations to Session, which decides
27. Does church leadership have a system for learning the congregation's values and priorities regarding funding and participation in outreach ministries?
- .a We have done a mission study or congregational survey in the last five years
 - .b We did a mission study of congregation's values and priorities more than five years ago
 - .c We have never done a mission study or surveyed members' values and priorities
 - .d We have a process that continually updates the mission study information to keep it current

Members' Gifts

28. How often is information about the congregation's programs and outreach efforts distributed to every member?
- .a Not at all
 - .b Quarterly or less often
 - .c Monthly
 - .d Weekly
29. How often is information about the congregation's programs and outreach efforts shared during worship?
- .a Not at all
 - .b Quarterly or less often
 - .c Monthly
 - .d Weekly
30. Are efforts made to communicate to the congregation the direct link between the effectiveness of programs and outreach efforts and how they are funded?
- .a Always
 - .b Often
 - .c Occasionally
 - .d Never
31. Does your congregation make efforts to interpret pledging by your members as a spiritual discipline?
- .a Always
 - .b Often
 - .c Occasionally
 - .d Never

32. How are members thanked for their annual contribution to the church?
- .a Newsletter article or general announcement during worship
 - .b A form letter is sent to each member with a letter of appreciation
 - .c A personal letter is sent to all contributing members thanking them for their support of the ministry
 - .d Not at all

Expectations of Members

33. Does your Stewardship (or similar) committee communicate an expectation for members to give at a higher level each year?
- .a Members are encouraged to increase their giving over last year's amount
 - .b Members are encouraged to raise the percentage of their income given from previous years
 - .c Members are asked to contemplate their entire financial circumstances and prioritize their giving based on their understanding of stewardship and the mission of the church
 - .d No expectation is set
34. Is it clear to members what their role is in achieving the annual budget?
- .a It is only clear to some members, because many don't read materials or attend meetings
 - .b Only church leadership understands what members' roles are
 - .c Congregation is very involved, aware of funding needs and Session priorities, and clear about their roles
 - .d Members have no clue
35. Does your congregation consider new ideas about giving and new approaches to stewardship in its stewardship planning process?
- .a We use stewardship resources from the denomination and members' experiences in other churches
 - .b We have an intentional rotating process set in advance for several years and entertain new ideas and input each year
 - .c We use the same method every year
 - .d No planning

Stewardship Evaluation

36. Does your congregation usually meet its challenge for funding its ministry?
- .a We always meet our expectations
 - .b We occasionally meet our original "wish list" or first draft budget
 - .c We seldom meet our original "wish" budget
 - .d No expectation or budget is set in advance
37. Does your congregation measure results of each annual commitment process?
- .a We analyze our giving as a percentage of household income
 - .b We analyze giving in numerous ways
 - .c We analyze giving in numerous ways and compare against giving in key churches that we used as benchmarks
 - .d We do not set expectations or measure results

38. How many of the following does your congregation evaluate when measuring stewardship results? Do you evaluate: (1) the number of pledging units; (2) total giving including non-pledge income; (3) the distribution of giving levels; and/or (4) the number of giving units increasing and decreasing support?
- .a All of the categories listed above
 - .b Three of the four categories listed above
 - .c Two of the four categories listed above
 - .d One of the four categories or no evaluation
39. With whom are evaluation results and giving data shared after each year's commitment process?
- .a One or two individuals
 - .b The appropriate committee of Session
 - .c The Session
 - .d All of the above plus the congregation

Supplementary Questions

1. In which settings or ways does your congregation interpret and teach stewardship? (Check *all* that apply.)
- .a Minute for mission during worship
 - .b Youth study class
 - .c Adult study class
 - .d Officers' meetings and retreats
 - .e Sermons
 - .f Other: _____
2. What has been the *most* effective means for members to respond generously to the mission and ministry of your congregation?
- .a Spontaneous giving
 - .b Support for special short term projects or causes
 - .c Pledge support for annual budget
 - .d Giving to mission directly
 - .e Support for a major project over several years
 - .f Planned giving
3. What metaphor or symbol would you use to describe the stewardship effectiveness in your congregation?
- _____
- _____
- _____
4. How would you interpret the "tithe?" (Mark only *one*.)
- .a Proportionate giving
 - .b Giving ten percent of my income after taxes to my church
 - .c Giving five percent of my after tax income for my church and five percent for other non-profit organizations
 - .d Giving ten percent of my income before taxes for my church and other giving is in addition to that amount