

## School of Stewardship – Congregational Prework:

- **Present membership**
  - Communicant Members \_\_\_\_\_
    - Total number of households \_\_\_\_\_
- **Track your finances over the last 5 years**
  - Track your budget Income and expense over the last 5 years (use the simple categories below or modify to fit your situation):

	Last Year	Two Years Ago	Three Years Ago	Four Years Ago	Five Years Ago
<b>Budget Income</b>					
Total					
Offering Portion					
School Portion					
<b>Budget Expense</b>					
Total					
Church Portion					
School Portion					

- **Last year’s budget:**
  - Bring copies of last year’s budget as it was originally approved
  - Bring a copy of last year’s final financial report
- **Congregational Debt**
  - Your congregation’s present operating debt \_\_\_\_\_
  - Your congregation’s building debt \_\_\_\_\_
- **Chart giving patterns within congregation:** Track the giving of the membership. If you already have categories you follow (or that match your software), use that. If not, track using the following WEEKLY giving categories

Total number of giving units \_\_\_\_\_

- \$ 0.00 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$ 1.00 – \$ 4.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$ 5.00 – \$ 9.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$ 10.00 – \$ 24.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$ 25.00 – \$ 49.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$ 50.00 – \$ 74.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$ 75.00 – \$ 99.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$100.00 – \$ 149.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$150.00 – \$ 199.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$200.00 – \$ 299.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$300.00 – \$ 399.99 = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%
- \$400.00 + = \_\_\_\_\_ (# of giving units) and \_\_\_\_\_%

The top 5% or \_\_\_\_\_ of our giving units gave \$ \_\_\_\_\_ or \_\_\_\_\_% of our income

## Faith Focused Finances

The top 10% or \_\_\_\_\_ of our giving units gave \$ \_\_\_\_\_ or \_\_\_\_% of our income

The top 20% or \_\_\_\_\_ of our giving units gave \$ \_\_\_\_\_ or \_\_\_\_% of our income

The top 50% or \_\_\_\_\_ of our giving units gave \$ \_\_\_\_\_ or \_\_\_\_% of our income

### ▪ Estimate the giving potential:

**Generic method:** (multiply the number of families in your church by the median family income in your area)

▪ Median income = \_\_\_\_\_ x \_\_\_\_\_ (# of families) = \_\_\_\_\_

### ▪ Brief record of stewardship education over the years (Check all that apply):

\_\_\_\_\_ Annual or Quarterly Statements

\_\_\_\_\_ Annual or Quarterly Member Directory

\_\_\_\_\_ Year-long Stewardship Calendar

\_\_\_\_\_ Recently received a Bequest

How much and how used?

\_\_\_\_\_ Use Spiritual Gifts Inventory

\_\_\_\_\_ Have Director of Assimilation

\_\_\_\_\_ Have Developer Officer for school

Name:

\_\_\_\_\_ Have Development Program for school

\_\_\_\_\_ Endowment Fund?

\_\_\_\_\_ Mail-In Offering Envelopes

\_\_\_\_\_ Annual Stewardship Drive

\_\_\_\_\_ Recent Estate Planning Seminars

\_\_\_\_\_ Fund Drive in Last Five Years

If so, what results?

\_\_\_\_\_ Use Time and Talent Survey

\_\_\_\_\_ Have Minister of Stewardship

\_\_\_\_\_ Utilize Estate Planning Services

If so, whom:

\_\_\_\_\_ Bible Class & Sermon Series

\_\_\_\_\_ Classes in stewardship

### ▪ Ministry Plan (if available)

○ Mission (vision) statement

○ Strategic Ministry Plan (if you have one)

### ▪ Job description of your stewardship committee or chairman (bring along, if you have one)

### ▪ Policy handbook for endowment fund (if you have one)

### ▪ Endowment Fund (amount) = \_\_\_\_\_