

Generosity Abounds! Stewardship Standards Assessment

Rate your church's adherence to each standard as follows:

0 Not happening/not sure 1 In process/somewhat 2 Happened in past or planned for future 3 Definitely happening

Basic Standards – Leadership	Rating	Notes
1. Our church leaders ensure that a request for financial support from the congregation is planned annually.		
2. Our pastor preaches on stewardship or generosity at least 1-2 times a year.		
3. Our church hosts one giving Sunday per year. (Worship service focused on tithes/offerings/pledges of support).		
Basic Standards – Education	Rating	Notes
4. Our church encourages participation in a personal financial literacy seminar.		
5. Our Education/SS leaders provide age-group appropriate stewardship education at least one time a year		
6. Our leaders/staff collect and share stories of faithful stewardship or generosity		
Basic Standards-Mission Giving	Rating	Notes
7. Our church supports a missionary or mission(s).		
8. Our congregation hears from its sponsored missionary once every few years; and/or shares information from them regularly in newsletter.		
9. Our church pays all apportionments.		
10. Our church participates in Special Sunday* offering(s)		
Basic Standards – Budgeting	Rating	Notes
11. Our church leadership creates, presents, and adopts a budget.		
12. Our church leadership administers the budget and evaluates it on a regular basis.		
Basic Standards – Accounting	Rating	Notes
13. Our church provides at least 3 ways for people to give (offering plate, envelopes, online)		
14. We have adopted a specific plan for receiving, counting, depositing, and disbursing church funds.		
15. We maintain appropriate records of all receipts and financial transactions.		
16. We record and distribute individual contribution statements.		
17. We ensure that persons handling church funds are bonded.		

18. We make regular financial and ministry progress reports to the church.		
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Max Score: 54 Total Basic Points: _____

Extra Points: Growing Church Standards

Growing Standard – Leadership	Rating	Notes
1. Our church established a separate stewardship committee tasked with determining an annual stewardship plan.		
2. Our pastor preaches on stewardship/generosity at least <i>once a quarter</i> .		
Growing Standard - Education	Rating	Notes
3. Our church <i>hosts/conducts</i> a faith-based personal financial literacy seminar or workshop series or class regularly (annually or bi-annually).		
4. Our church provides age-group appropriate stewardship education throughout the year.		
5. Our church shares stories about the impact of Connectional Giving.		
Growing Standard – Mission Giving	Rating	Notes
6. Our church supports a mission or missionary specific to the UMC		
7. Our church hosts a speaker about UMC Connectional Giving at least once a year.		
8. Our church incorporates missions as part of the worship experience in intentional ways.		
9. UMC Special Sundays* are included in our church's annual stewardship plan.		
Growing Standards - Budgeting	Rating	Notes
10. Our church involves laity in determining budget priorities. (Surveys, interviews, focus groups)		
11. Our church makes budget information available to the entire congregation.		
Growing Standards- Accounting		
12. Our church offers ways to give gifts of appreciated assets (like stocks).		

Max Score: 36 Total Growing Points: _____

Add 2 points if you have completed the following: Church Vision process, Church Strategic Plan, Church Intentional Discipleship Program, Church Story, Mission Giving Discernment Process.

Max Total Score: 100 Total Points: _____

**Special Sundays are: Human Relations Day, UMCOR Sunday, Native American Sunday, Peace with Justice Sunday, UM Student Day, World Communion Sunday*

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Results Interpretation Guide for Basic and Growing

Step 1: Covering the Basics

How did you assess your level of conformity with the basic stewardship standards? Look at anything in which you got a 0 or 1. Highlight these standards on your worksheet.

What about the standards where you rated yourself a 2? Why did those standards stop in the past or why have they not been implemented yet if they are in process? Make a note next to each of those with your thoughts about the answers.

Now look at the ones in which you received a 3. If you could take one step forward to the next level of stewardship growth on any of these, which ones would they be? Rank these standards by putting a number in the margin next to it. Rank your first choice as 1, your second choice as 2, and so forth.

Step 2: Standards for Growth

Now look at the Growing Church Standards. Did you rate any as a 2? Again, make a note about why you think these standards haven't been implemented or what may be preventing implementation. If you gave your church a 3 on any of these, congratulations! That means you've already taken a step forward in stewardship growth.

Step 3: The Other Pieces of the Puzzle

Did you receive any points for the other work your church may have done such as a strategic plan or intentional discipleship program? Completing these 5 processes will help your church build a sustainable, more successful stewardship program. We'll cover more about these later in the program.

Step 4: Your Total Score for Basic and Growing

On the first two pages of the assessment, your total possible score was 100 points.

If you received a score of 85 or more, go on to the next set of assessments.

If you received a total score between 60-84, do the following:

1. Look at anything that received a 0, 1, or 2 in the Basic Standards. These should be your first priority to address.
2. Now go back and look at the items you ranked in the Basic Standards (the ones that you rated a 3 in that section). Compare those to the similar standards within each section of the Growing Standards assessment. What would be the next step up for your church in these areas? (Look at the illustrations below to get more ideas and see how this could work.) Set a goal to take one step forward in stewardship growth in each area you identify as a priority.

If you scored lower than 60 points, then go back to Step 1 and look at the standards you highlighted. Your focus should be on strengthening the basics of stewardship until you can confidently rate your church at 45 or higher in the Basic Standards section. Re-take the assessment after you've addressed these issues.

Taking it to the Next Level: Mature and Extraordinary Church Stewardship Standards

Rate your church's adherence to each standard as follows:

0 Not happening/not sure 1 In process/somewhat 2 Happened in past or planned for future 3 Definitely happening

Mature Church Standards

Mature Standards: Leadership	Rating	Notes
1. Our church trains the stewardship committee.		
2. Our church uses outside counsel to help develop the annual stewardship plan.		
3. Our church reviews and evaluates the stewardship program/plan annually.		
4. Our church implements specific events to challenge members to grow in their giving.		
Mature Standards: Education	Rating	Notes
5. Our church develops and executes a personal financial literacy education plan.		
6. Our church regularly offers education related to estate planning.		
7. Our church uses member testimonials about the impact of giving in worship (written, video or live) throughout the year.		
Mature Standards: Mission Giving	Rating	Notes
8. Our church has established mission goals and provides these along with giving guidelines to the congregation.		
9. Our church conducts a Second Mile Giving campaign for one of the church's identified mission goals.		
10. Our church provides quarterly reports on mission goals and results of fundraising to the congregation.		
11. Our church regularly incorporates connectional giving reports in worship		
12. Our church sends members on mission trips related to the mission goals and shares information with the congregation about their experience.		
Mature Standards: Budgeting	Rating	Notes
13. Our church provides a narrative budget to tell the story (past and future) of church ministries.		
Mature Standards: Accounting	Rating	Notes

14. Our church has an endowment.		
15. Our church conducts an audit/review of financial records and practices.		

Max Score: 45 Total Mature Points: _____

Extraordinary Church Standards

Extraordinary Standards: Leadership	Rating	Notes
1. Our church leaders lead by example and are expected to give generously relative to their means.		
2. In our church there is a high expectation for members to uphold their commitment to supporting the church with their prayers, presence, gifts, service, and witness		
3. Our church has developed a generosity statement aligning generosity principles with what our church believes.		
4. Our pastor preaches on the joy of giving all year long and emphasizes <u>generosity</u> over stewardship.		
5. Every Sunday before the offering, our leaders tell stories about the transformation that is happening through our church because of our congregation's generosity.		
6. Our leaders speak on the vision of the church often.		
Extraordinary Standards: Donor Development	Rating	Notes
7. Our pastor knows the major donors in the church.		
8. Donors in our church are asked to give to special projects based on interest, ability, willingness, etc. not just obligation.		
9. Our leaders thank donors often and our pastor writes personal thank you notes to financial leaders/donors.		
Extraordinary Standards: Education	Rating	Notes
10. Our leaders share generosity principles in small groups, Bible studies, and other groups.		

11. Our church leaders lift up generosity as part of the discipleship path and equate giving with participation in worship, small groups, and mission service.		
12. Our leaders wrap all efforts in prayer and an attitude of gratitude.		
Extraordinary Standards: Budgeting	Rating	Notes
13. Our leaders use abundance mentality language when sharing about the budget and asking the congregation to support it.		
14. Our church conducts a survey to gauge donor understanding of church finances; then answers our questions in an FAQ format.		
Extraordinary Standards: Accounting	Rating	Notes
15. Our church offers text to give, a giving kiosk at the church, and automatic bank drafts as well as typical giving formats.		
16. We use giving data to segment donors and create appropriate messages for different levels of giving.		
17. We send warm, relational quarterly statements highlighting an important ministry in the church or story of a life changed, or a testimonial.		
18. We report how funds were used including what ministries were funded and benchmarks accomplished relevant to our ministry goals.		
19. Our church recognizes legacy donors with a recognition society, wall, event or other means.		

Max Score: 57 Total Extraordinary Score: _____

Max total score: 102 Total Score: _____

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Results Interpretation Guide for Mature and Extraordinary

If your church stewardship program falls in the category of Mature or even Extraordinary, congratulations! Your church is exceeding expectations and hopefully you are seeing the results of that commitment. Churches that start the assessment process at the “Mature” level still have room for growth, however, so it’s important to address those unmet areas.

Step 1: Covering the Basics

Complete the Basic and Growing assessments and make sure all these areas are being covered. Prioritize anything that received a 0, 1, or 2.

Step 2: Maturing in Generosity

Review your ratings for the Mature Church assessment category. Where do you see room for improvement? Could the items you rated 0, 1, or 2 change with some intervention? Make a list of those that could be improved and for each item, specify what resources would be required to achieve it. Prioritize this list based on your committee’s discernment about the priorities of the church.

Step 3: Embracing the Extraordinary

Have a discussion about the Extraordinary Standards. Ask the following questions:

1. What kind of culture does a church need to be able to achieve these “ideal” standards? List some attributes of that church culture.
2. What words would you use to describe your church culture regarding giving? Do the words you’ve chosen match the “ideal” culture you described in question 1?
3. What would it take to move your church into the Extraordinary Standards category? Are you almost there? Halfway there? Still have some work to do?
4. Pick 3 things you’d like to address this year to move your church into the Extraordinary Standards category. Decide who should be in charge of taking on the work and how often you will report on progress.

After you have made your priority list in Step 2, identified 3 Extraordinary Standards to focus on, and established a timeframe for making improvements, set a date to retake the assessment and see if your score goes up. Keep using the assessment in the future as a guideline and benchmark for your progress as you work to improve the culture of generosity in your church.