



Dakotas Conference
Minnesota Conference

Dakotas Foundation
Minnesota Foundation

The United Methodist Church

Finance and Stewardship Survey

For Pastors, Financial Staff, and Church Committee Leaders of the Dakotas Annual Conference

As the pastor, financial staff member, or committee leader of your local church, we invite you to complete the following survey. Our intention is to assess the needs of the local church, staff, and leaders around finance and stewardship in order to develop education, training, and resources and strengthen the financial health of the local church.

Each person taking the survey completes the following section.

Name: _____

Church Name and Location: _____

Role: _____

Please fill out the section below that corresponds with your role.

Thank you for your time in completing the survey. Your results will be reviewed by Jeff Pospisil, Conference Treasurer, Sheri Meister, Executive Director of the Dakotas Foundation, and Diane Owen, Area Program Director around the initiative addressing the Economic Challenges Facing Our Pastoral Leaders.

*Surveys completed on paper (versus online) should be returned by **April 30th** to:*

Kelsey Morgan

Dakotas Annual Conference

PO Box 460

Mitchell, SD 57301

**If you are the leader of the FINANCE COMMITTEE, STEWARDSHIP COMMITTEE,
or TRUSTEES COMMITTEE, please answer the following questions:**

As the Committee leader, select the areas in which you would like training and education for your committee members. As these are broad topics, feel free to clarify with comments next to the topic.

Select up to five:

- Annual operating campaign _____
- Capital campaign _____
- Offerings and ways to give _____
- Operating Budget: income _____
- Budgeting Expenses _____
- Apportionments _____
- Contingency Planning _____
- Financial Reserves _____
- Accounting for Designated Funds _____
- Financial Reporting _____
- Giving Statements _____
- Internal Financial Controls _____
- Statistical Reporting and Tables _____
- Insurance and Workers Compensation Insurance _____
- Church audit or financial review _____

Select up to four:

- Assets and Investments (investment policy) _____
- Donor cultivation _____
- Year-round stewardship and generosity practices _____
- Caring for Designated Funds _____
- Endowments (including setting up a committee) _____
- Caring for Designated Funds _____
- Legacy planning _____
- Spending policy/restrictions _____
- Gift acceptance policy _____
- Other topics not listed: _____

What is your team's preferred style of learning?

- In-person
- Zoom class
- Webinar
- Self-directed e-learning