

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.

Lacif 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 <u>PASTOR</u>, please answer the following questions.

Select the areas in which you would like additional training and education. As these are broad topics, feel free to clarify with comments next to the topic.

Select	up to three:				
	Clergy Payroll				
	Clergy Taxes				
	Clergy Health & Wellness Benefits				
	Clergy Pension				
	Clergy Compensation Form				
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				
	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				
	Gift acceptance policy				
	Endowments (including setting up a committee)				
	Caring for Designated Funds				
	Legacy planning				
	Spending policy/restrictions				
	Other tonics not listed				

Select which committees are established or if you would like assistance in creating this committee:

FI	Thance Commit	ltee □ No	☐ No and would like	guic	lance creating
St	tewardship Cor	mmittee		J	, and the second
3.	☐ Yes	□ No	☐ No and would like	guic	lance creating
G	enerosity Com	mittee			
	☐ Yes	□ No	☐ No and would like	guic	lance creating
Tı	rustees Commi	ttee			
	☐ Yes	□ No	☐ No and would like	guic	lance creating
How	Yearly	ır worship i	and preaching include	stew	ardship and generosity themes? Weekly Other
	dently about m	noney, fina	e attitude about the find a stevential matters, and stew		al health of the church and speaks hip.
] Yes 🔲 N	No 🗆 U	nsure		
	ongregation unnce of a matur			al ma	tter, part of faith of formation and
	Yes 🗆 N	No □U	nsure		
Оо ус	ou review the g	iving recor	ds and patterns of you	r cor	ngregations?
	. 55				No
lf	no, say more _				
What	is your prefer	red style of	learning?		
					Webinar
	Zoom class				Self-directed e-learning
Оо ус	ou prefer learni	ing with yo	ur church leader?		
	Yes				No
		_	cation, are you interes	ted i	n working with a financial coach to
	Yes*		-		No
*If ye	s, would you p Seasoned Pa		ancial coach who is a m		seasoned pastor or lay professional? \Box Either