



Dakotas Conference  
Minnesota Conference

Dakotas Foundation  
Minnesota Foundation

The United Methodist Church

## Finance and Stewardship Survey

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**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 PASTOR, 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 \_\_\_\_\_
- 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 \_\_\_\_\_
- Gift acceptance policy \_\_\_\_\_
- Endowments (including setting up a committee) \_\_\_\_\_
- Caring for Designated Funds \_\_\_\_\_
- Legacy planning \_\_\_\_\_
- Spending policy/restrictions \_\_\_\_\_
- Other topics not listed \_\_\_\_\_

