



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 CHURCH TREASURER, BOOKKEEPER, or FINANCIAL SECRETARY,
please answer the following questions:**

What financial position do you hold?

- Treasurer Bookkeeper Financial Secretary

Is this a paid position?

- Yes No

Do you outsource accounting/bookkeeping to a third party?

- Yes (if yes, state company) _____
 No (if no, what system do you use) _____

Do you outsource payroll to a third party?

- Yes (if yes, state company) _____
 No

Do you use a computer and the internet to perform your work?

- Yes
 No (If no, would you be interested in computer training) _____

Select the forms where additional training would be helpful:

- | | |
|--|--|
| <input type="checkbox"/> Compensation Form | <input type="checkbox"/> 1099 |
| <input type="checkbox"/> Form 941 | <input type="checkbox"/> Annual Statistical Report |
| <input type="checkbox"/> W-2 | <input type="checkbox"/> Salary Reduction Agreements |
| <input type="checkbox"/> W-4 and W-9 | |

Does your pastor have access to giving records?

- Yes
 No (if no, say more) _____

Has the church had a financial audit?

- Yes
If yes, when was the last audit performed and by whom?

 No (If no, indicate if you have one planned) _____

Select the topics in which you would like more training.

- | | |
|---|--|
| <input type="checkbox"/> Payroll | <input type="checkbox"/> Preparing Financial Statements |
| <input type="checkbox"/> Clergy Compensation | <input type="checkbox"/> Apportionments and Remittances |
| <input type="checkbox"/> Completing W-2's | <input type="checkbox"/> Statistical Reporting |
| <input type="checkbox"/> Insurance and Worker's Compensation | <input type="checkbox"/> Outsourcing accounting |
| <input type="checkbox"/> Internal Controls | <input type="checkbox"/> Navigating the annual conference website for information and forms |
| <input type="checkbox"/> General accounting questions (please list) | |
- _____
