

# Church Financial Health Assessment



**Rev. Dr. Rose Niles**

Ministry Relations Officer  
Northeast Region

# Church Financial Health Assessment

See how your church is doing in key areas:

- Budgeting
- Finances
- Stewardship
- Legacy Giving

Get recommendations and advice from the report and, if desired, your Ministry Relations Officer.



# Download our worksheet

WELCOME TO PRESBYTERIAN FOUNDATION'S

## Financial Health Assessment

The Financial Health Assessment is a tool for learning more about your church's finances and how your congregation compares to other PC(USA) churches your size. Completing this tool only takes a few minutes but does require knowledge of your church's finances. [Please download this worksheet to see all of the questions](#) and collect information before you get started online. Those completing the assessment for their church can be a church treasurer, clerk of session, pastor, or church administrator. Once you have completed the assessment, You will be provided with a detailed report noting both successes and areas for improvement, along with links to helpful resources to you on your way.



# How to register



Login

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## Financial Health Assessment

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## STEP 1

# Create An Account

The Financial Health Assessment uses information previously provided to the denomination through the Clerk's Annual Questionnaire. Find your congregation by searching for the city, state, and then church name. You can search just by state and choose your congregation from a list, or city and state, and choose your church. Next, create your own username and password. Churches may have more than one account to accommodate multiple users. Please use your personal name and not the church name in the name field.

[SIGN IN / REGISTER](#)



## STEP 2

# Take the Assessment

You will be guided screen by screen through a series of questions about your church. These questions include average worship attendance, percentage of members who pledge, your church's stewardship plan, if your church has an external audit, and several other questions that are key indicators of financial health. After answering a question, hit "next" in the bottom right corner of the screen, and you'll go to the next question. The status bar along the top will tell you how much more you have to go.

[BEGIN ASSESSMENT](#)



# How to select your church: state only

Registration  
Please search for your congregation.

Congregation State\*

State

Congregation City

City

Congregation Name  
When entering the church name, enter only the first word of the church name.

Name

[Already registered?](#) **FIND CONGREGATION**

Registration  
Please choose your congregation.

Congregation Search Results

- Absecon of Absecon, NJ
- Alexandria First of Milford, NJ
- Allentown of Allentown, NJ
- Amwell Second of Lambertville, NJ
- Andover of Andover, NJ
- Armenian of Paramus, NJ
- Atco United of Atco, NJ
- Basking Ridge of Basking Ridge, NJ
- Bayard Street of New Brunswick, NJ
- Beemerville of Wantage, NJ
- Berkshire Valley of Wharton, NJ
- Bethany of Bloomfield, NJ
- Bethany of Englewood, NJ
- Bethany of Haddon Heights, NJ
- Bethel of East Orange, NJ
- Bethel of Plainfield, NJ
- Bethel Hispanic of Vineland, NJ
- Bethlehem of Pittstown, NJ
- Beverly of Beverly, NJ



# How to select your church: State and City

Registration  
Please search for your congregation.

Congregation State\*  
NJ

Congregation City  
Trenton

Congregation Name  
When entering the church name, enter only the first word of the church name.  
First

[Already registered?](#) **FIND CONGREGATION**

Registration  
Please choose your congregation.

Congregation Search Results

- Christ Hamilton Township of Trenton, NJ
- First of Trenton, NJ
- West Trenton of West Trenton, NJ
- Westminster of Trenton, NJ

[Already registered?](#) **CONTINUE**



# How to find your church: City, state, name

Registration  
Please search for your congregation.

Congregation State\*

NJ

Congregation City

Trenton

Congregation Name  
When entering the church name, enter only the first word of the church name.

First

[Already registered?](#) **FIND CONGREGATION**

Registration  
Please choose your congregation.

Congregation Search Results

First of Trenton, NJ

[Already registered?](#) **CONTINUE**

*Hint: for the church name, just use the first word of the church name.*



# Registering

Name

Barbara Smith

Email

robynds@live.com

Password

••••••

Confirm Password

••••••

Congregation

First of Trenton, NJ

[Already registered?](#)

REGISTER

When registering, please use your name, not the name of the church.

Use an email address you have access to. A PDF of the report will be sent there.

Choose a password. It must be at least 8 letters.



# After registration, take the assessment

## Welcome to *Your User Dashboard*

Your previous financial assessments will live here, as well as any that you create in the future. You can access them at any time.

[TAKE ASSESSMENT](#)



# About you

Please indicate your position with this congregation (Check all that apply):

- Pastor
- Interim Pastor
- Associate Pastor
- Elder
- Treasurer
- Church Member
- Member of Stewardship / Generosity or Finance Committee (or equivalent)
- Member of another Standing Committee
- Other

NEXT



# Church leadership

**Who is currently providing your congregation's pastoral leadership?**

- Installed Pastor
- Interim Pastor
- Stated Supply
- Designated Pastor
- Commissioned Lay Pastor
- Other

PREVIOUS

NEXT



**How many pledging or giving units are in your congregation? For purposes of this material, a “giving unit” is a uniquely identifiable contributor. It could be one person, a couple, or an entire family.**

PREVIOUS

NEXT

*These are pull-down menus with ranges*

**Approximately what percentage of your congregation participates in giving? (Choose One)**

90%-75%



PREVIOUS

NEXT



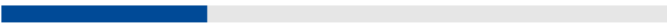
# Giving

**What were total contributions  
for the past calendar year?**

\$0 – \$24,999 ▼

PREVIOUS

NEXT



*These are pull-down  
menus with ranges*

**How much of last year's total  
contributions were pledged income?**

90% or greater ▼

PREVIOUS

NEXT



# Communications



**Does your congregation have a written, annual stewardship plan in place?**

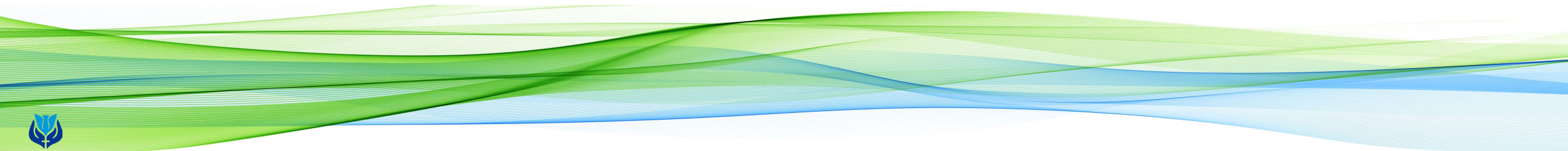
Yes ▼

**Is this plan shared with the congregation on an annual basis?**

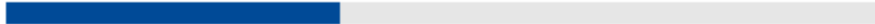
Yes ▼

PREVIOUS

NEXT



# Communications

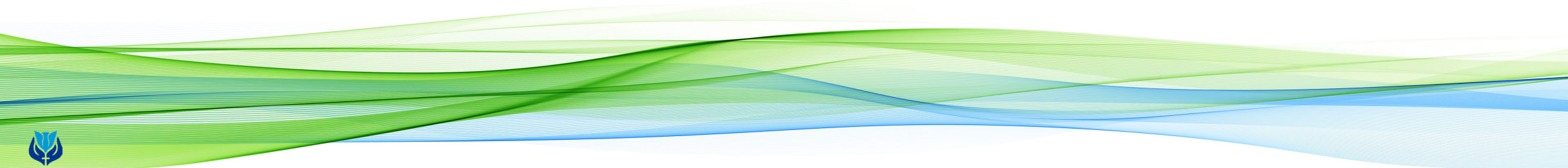


**In the past year, how often has stewardship / generosity been a topic in a sermon?**

PREVIOUS

NEXT



# Communications

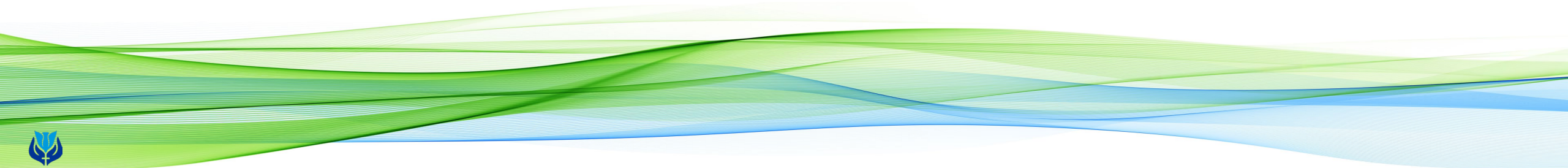


**Does your congregation regularly insert written information on stewardship and giving in the weekly bulletin and other communication vehicles?**

PREVIOUS

NEXT



# Communications



**Does your congregation have a website?**

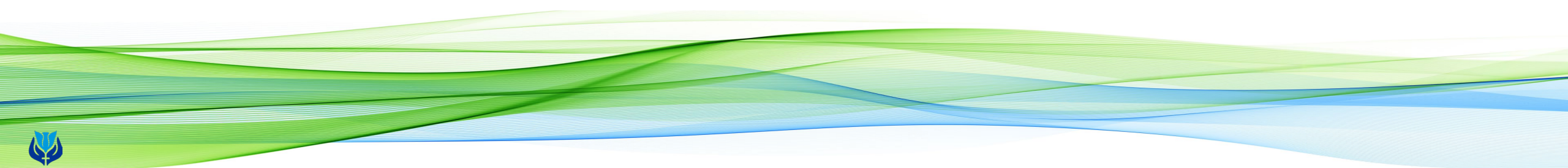
Yes ▼

**Can congregation members make a gift on-line through your website?**

Yes ▼

PREVIOUS

NEXT



# Finances



**Is your annual budget mostly funded  
by one or just a few individuals?**

Yes ▼

PREVIOUS

NEXT



# Finances



**Is your congregation currently operating at a deficit?**

Yes ▼

*These are pull-down menus with ranges*

**How long have you been operating at a deficit?**

Less than 1 Year ▼

PREVIOUS

NEXT



# Finances

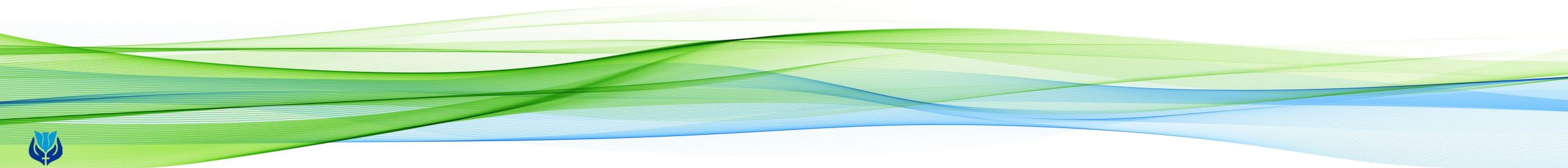


**Does your congregation have an annual review of its finances?**

PREVIOUS

NEXT



# Finances

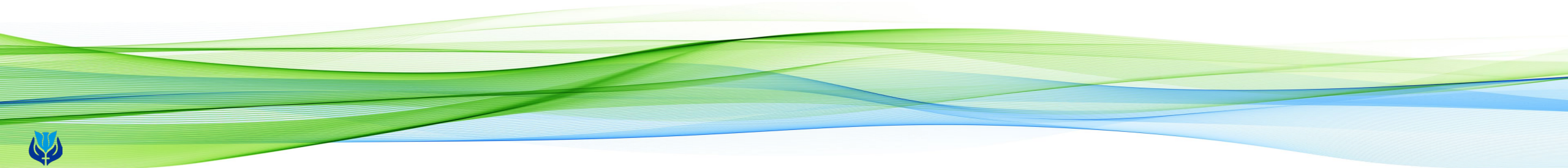


**Who in your congregation is responsible for leadership in the area of stewardship & generosity?**

Stewardship / Generosity Team ▼

PREVIOUS

NEXT



# Finances

*These are pull-down menus with ranges*

**What portion of the budget goes to support outside mission work?**

0% ▼

PREVIOUS

NEXT



# Stewardship

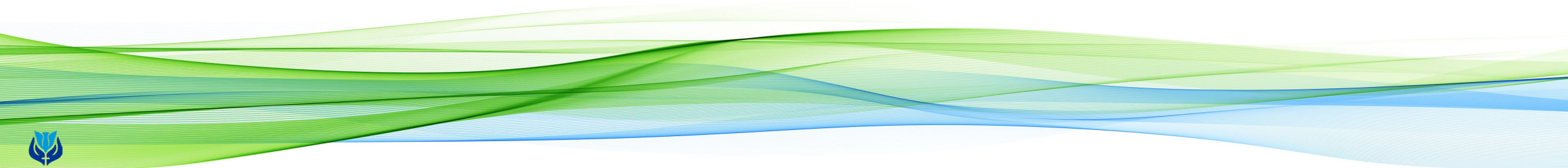


**How open do you feel your congregation is to considering new ideas about giving and new approaches to stewardship/generosity? (Choose the option that best describes your current situation)**

Very open – We actively seek out new ideas & approaches from other congregat ▼

PREVIOUS

NEXT



# Bequests



**How many different bequests did your congregation receive in the last year?**

PREVIOUS

NEXT



# Foci for your church

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**Which of the following financial areas do you feel are most important for your congregation to focus on moving forward? (Check all that apply)**

- Building Endowment
- Conducting Capital Campaign
- Building Culture of Generosity
- Retiring Debt
- Meeting Annual Operating Budget
- Other

PREVIOUS

NEXT



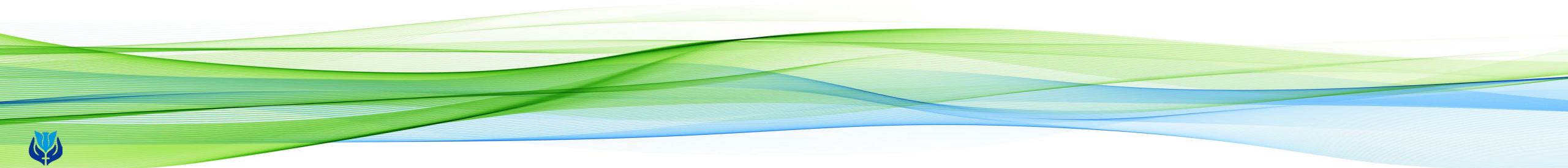
# Planned Giving



**Does your congregation have a planned giving program that routinely educates membership on areas such as bequests & trusts?**

PREVIOUS

NEXT



# Endowments



**Does your congregation have endowments? (For this assessment an endowment is defined as a restricted body of funds where only interest and earnings are used for operational purposes)**

**What is your average spending rate?**

*These are pull-down menus with ranges*

PREVIOUS

NEXT



# Cash reserves



**Does your congregation have cash reserves?**

Yes ▼

**As a percentage of your total operating budget, would your reserves be?**

more than 100% ▼

*These are pull-down menus with ranges*

PREVIOUS

NEXT



# Capital campaigns



**Has your church had a capital campaign any time in the last 10 years?**

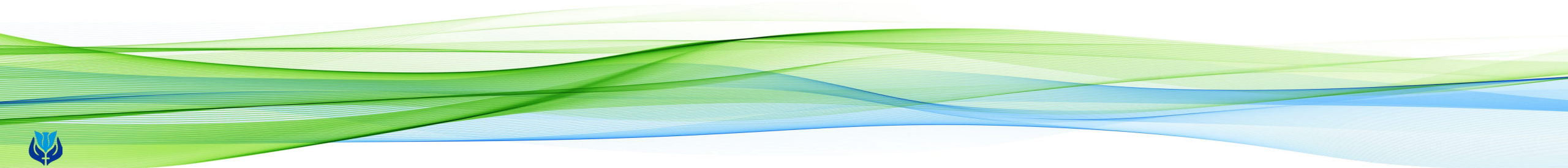
Yes ▼

**Did you reach your campaign goal?**

Yes ▼

PREVIOUS

NEXT



# Gifts

**In the past five years, has your church received any gifts in the form of real estate, stocks or other non-liquid assets other than cash?**

Yes



**Approximately how many such gifts have been received?**

1 to 3



**What was the approximate total value of those gifts?**

\$0 - \$24,999



PREVIOUS

NEXT



# Talk to your Ministry Relations Officer

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**Would you like a Presbyterian  
Foundation representative to contact  
you to discuss the results of this survey?**

Yes



PREVIOUS

NEXT



# Your report

ASSESSMENT COMPLETE

## Thank You for Completing the Financial Health Assessment

Thank you for completing the Financial Health Assessment. The information you provided has been analyzed. A customized assessment report with recommendations to provide to your congregation and action steps can be downloaded by clicking the enclosed link. A PDF of the report will be emailed to you shortly.

[BACK TO ACCOUNT](#)

[VIEW REPORT](#)



# Report example



DOING WELL IN

## Capital Campaigns

Besides raising funds for specific projects, capital campaigns help raise excitement about the church's long-term vision, and provide extra opportunities to talk about generosity with your congregation. Effective capital campaigns start with a broad, open discussion within the congregation about its vision and needs for the future. Conversations about what is possible (called a feasibility study) can lead to assembling a leadership team and accumulating leadership gifts. The more public aspects of the campaign follow, leading to a celebration of the campaign's success and regular updates to givers on the impact their gifts are having.

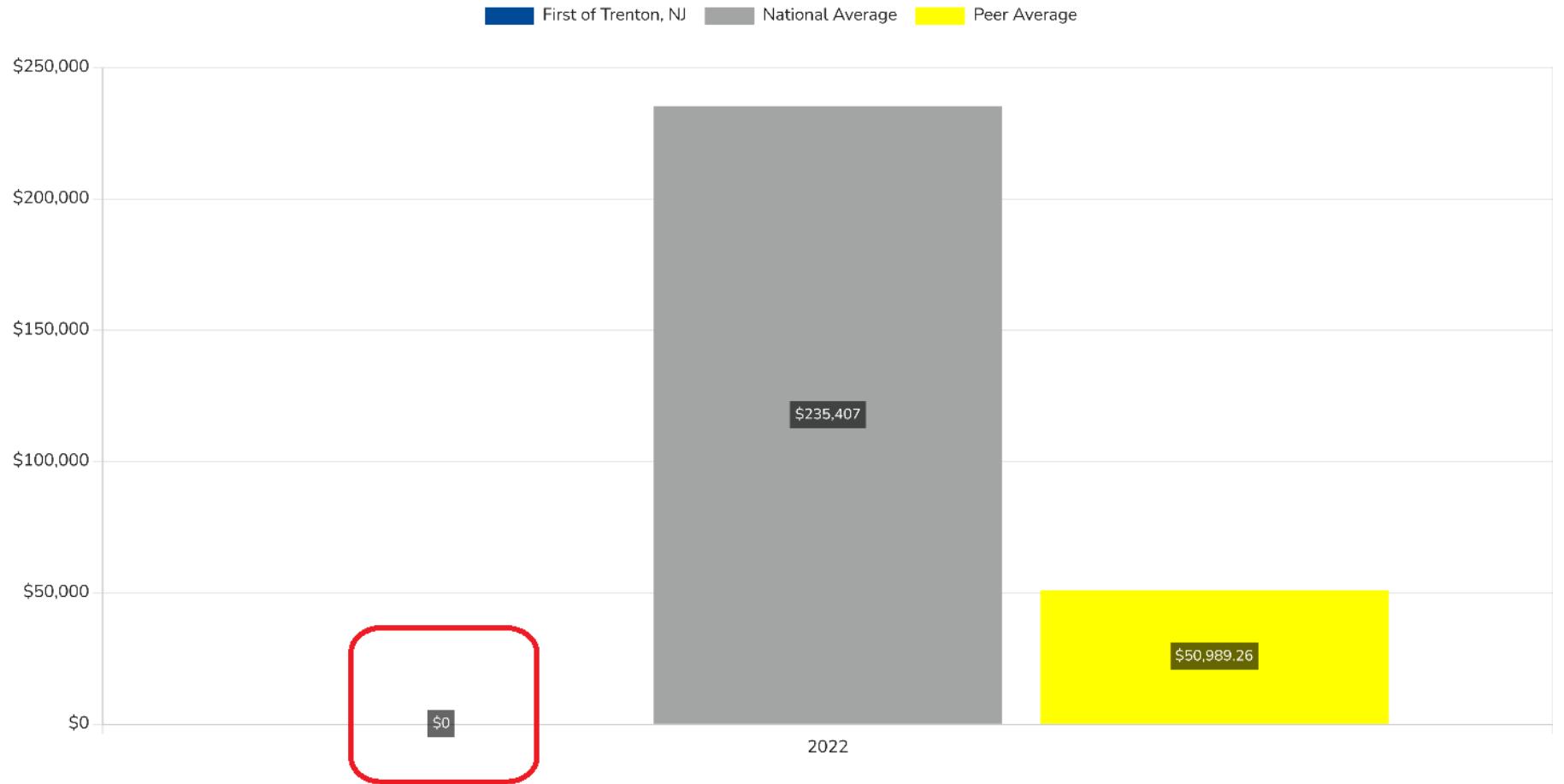
### List of Resources for Follow Up

- [Handout: Are We Ready for a Capital Campaign?](#)
- [Handout: Ingredients of a Successful Capital Campaign](#)
- [Handout: Biblical Reasons for Giving & Generosity](#)
  - [Stewardship Kaleidoscope annual conference](#)
  - [Presbyterian Investment and Loan Program](#)
    - [New Covenant Trust company](#)



# Report example

*The first bar only appears as 0 if a church did not provide any financial information in the Clerk's Annual Questionnaire. The 0 does not mean the church doesn't have income in that category.*





## **Rev. Dr. Rose Niles**

Northeast Region

845-326-6501

[Rose.Niles@presbyterianfoundation.org](mailto:Rose.Niles@presbyterianfoundation.org)



Presbyterian  
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