

PURPOSE:

Based on the success of the Foundation's Congregational Financial Health Assessment — which has attracted the participation of nearly 1,000 churches — we will provide comparative financial data to assist presbytery volunteer and staff leaders as they evaluate their own financial vitality and organizational sustainability.

DEFINITIONS:

Data is assumed to be gathered from the presbytery's most recent financial statements, or the most recent calendar/fiscal year if specified.

Narrative-style "Estimated..." questions need not be over-thought. We simply seek the "best guess" of the person completing the survey.

TIMEFRAME:

Following the input of a focus group comprised of presbytery treasurers from around the country and first- and second-phase testing, full-scale data collection begins in July 2017 with initial reporting expected mid-November.

ACCESSING THE TOOL:

The assessment can be completed within this fillable PDF document and saved and returned via e-mail; completed online at presbyterianmissionexchange.org/presbytery-financial-data-survey; or provided hard-copy by printing and completing this document and mailing, faxing, or scanning/e-mailing it to us as indicated below.

Thank you for your participation!

MAILING INSTRUCTIONS *(if not completing online)*

Snail Mail:

Presbyterian Foundation
2310 Augusta St.,
Greenville, SC 29605

Email:

paul.grier@presbyterianfoundation.org

Fax:

864-242-9157 (attention Paul Grier)

Please contact Paul Grier at 1-800-858-6127, ext. 5953 with any questions.

Presbytery _____

Date _____

Person Completing this Assessment _____

Email _____

SECTION A: BALANCE SHEETS

A1. Cash on hand/readily-available reserves \$ _____

A2. Total reserves and investments \$ _____

A3. Total loans receivable \$ _____

A4. Total presbytery assets. \$ _____

A5. Amount of congregational loans guaranteed \$ _____

A6. Total fair-market value of properties for which presbytery has guaranteed a loan . . . \$ _____

A7. Total presbytery indebtedness, not including guarantees of congregations' loans . . . \$ _____

SECTION B: INCOME STATEMENTS

B1. Current annual revenues \$ _____

B2. Current annual expenses. \$ _____

B3. Annual revenues in 2011 \$ _____

B4. Annual expenses in 2011 \$ _____

SECTION C: CONGREGATIONAL PARTICIPATION

C1. Total congregational mission giving. \$ _____

C2. Presbytery per-capita assessment amount \$ _____

C3. Total congregational presbytery per-capita remittances \$ _____

C4. Commissioners' meeting attendance trends over last five years (*narrative response*)

SECTION D: CONGREGATIONAL VITALITY

- D1. Number of congregational closures, last 5 years _____
- D2. Number of congregational dismissals, last 5 years _____
- D3. Number of currently-vacant pulpits _____
- D4. Number of Administrative Commissions presently in force _____
- D5. Estimated number of closures in the next 3 years. _____
- D6. Estimated number of dismissals in the next 3 years _____

SECTION E: OTHER

E1. Number of full-time equivalent presbytery employees _____

E2. Are the presbytery's endowment/reserve funds being invaded? (*narrative response*)

E3. Does the presbytery expect significant infusions of capital in the near term? (*narrative response*)

Are there any comments or other information you would like to provide?

