



NLI Self Study

The purpose of the self study is to introduce your church to the innovation weekend team.

Where have you been?

What might your future be like?

What areas are strong and what areas are weaker going into a time of innovation?

Please compile the following for the Innovation Weekend Team.

1. Self Study Checklist
2. Giving Calculations
3. Self Study Summary

To submit your files:

- Deliver a single packet of all the materials OR
- Put materials on a USB stick OR
- Place materials in Dropbox granting Sarah at sarahcalvert@vaumc.org access.

**This information is DUE to the District office
NO LATER THAN One Month before your innovations weekend.**

Required Documents	Who will prepare	Done
Communications		
2-3 recent bulletins from this year		
Newsletter samples (print and electronic) from the past year		
List of Social Media Accounts		
Communications Plan, if you have one		
Church Involvement		
Lay leadership roster (committees and teams) and years served		
Real Discipleship Survey Results		
Chart of church structure and how committees/teams relate		
Pastors and Staff		
List of pastors and years served from past 20 years		
Church staff for the past 20 years (with years served & position/title)		
Staff organizational chart * Don't forget this one!		
Mission Insite Data		
Full Insite report (will be provided by District Office)		
Church attendee database sent to District Office		
Comparative Index Report (requires church database information you provide to Sarah)		
Preschool Information		
Explain the relationship between the church and the preschool. (Ownership, operation, financial subsidiary)		
Explain the connection that preschool families have to the church.		
10 years of statistics		
Average worship attendance		
Professions of Faith		
# of small groups		
Giving to missions, church budget, church debt		
Financial Information		
Detailed Church Budget for past two years		
Giving Calculations from attached handout		
Brief church history (3-5 pages)		
Self Study Summary		
Completed by the entire team after reviewing all materials.		

Giving Calculations

To the extent that you can, go back 3-5 years, 10 is even better on these trends. Hopefully the church office has a file of all of those year-end reports you have to submit.

1. Your bottom line last year. Did income equal expenses? Income exceed expenses? Expenses exceed income? What percentage of income was from congregational giving? What percentage of income was from other sources (i.e., endowment, rental income, etc.)? Did you have any exceptional sources of income or expense last year? What percentage of apportionments did you pay last year?
2. Total amount received from identified givers. This is the core of your stewardship program. Forget the day care rent, the wedding rentals, income from the Swiss Steak Supper, just giving. Add columns 62a and 62b in the Conference Journal.
3. What you have in the bank. Beyond your checking account, what do you have? Endowment funds? Reserve funds? Savings accounts? CDs making less than 1%? What has that trend been over the years? You'll find this in column 32 in the Conference Journal.
4. Giving by decades. This one may be hard to do, but worthwhile to observe. To the best of your ability group your donors into age groups, people in their 20s, 30s, 40s, all the way up to 90+. What do you notice? (and no, not every group is paying 'their fair share' - that's not the objective)
5. Average giving per identified giver. Nationally this trend is going up, a smaller group of donors is giving larger per capita gifts. Divide your total giving by the number of attendees as well. Any interesting trends show up?
6. When you figured your bottom line were there endowment withdrawals factored in? Take a look at all that you have in the bank and divide that by the amount you used last year. How long does that project out? Will you run out of money in the foreseeable future?
7. Consider #5 & #6 above against the giving by decade number. Is the consumption of assets likely to remain steady or will you be likely to lose some income and accelerate raiding your reserves?
8. List out the top twenty gift amounts (without names). What percentage of the church budget is met by the top ten gifts? The top twenty?



Self Study Summary

Name of Church _____

Names and leadership positions of those who worked on compiling the information and completing the reflection below.

Name

Position

What stood out to you as you put this study together?

What trajectory do you see for your church based upon the self-study?

On a scale of 1 to 10, 1 being most unlike and 10 exact match, how well does your church match your neighborhood? What are your reasons for that score?

Is there a recurring problem or conflict? (topic, ministry area, staff position)

What works well in your church?

What does this church need to learn?

What would a newcomer think of your church?

Is there anything else you would like to highlight for the weekend team?