



NLI Self Study

The purpose of the self-study is for the NLI to take a close look at the current realities of the church. In addition, it will aid the Weekend Innovations Team in becoming familiar with and gain an understanding of your church.

The self-study aims to answer:

Where have we been?

What might our future be like?

What areas are strong and what areas may be weak going into a time of innovations?

Please compile the following for the Weekend Innovations team:

1. Self-Study Checklist
2. Financial Analysis
3. Self-Study Summary

To submit your files, choose one of the following methods:

1. Put materials on a USB drive and give to the District Office **OR**
2. Place materials in Dropbox granting access to: mariamaxwell@vaumc.org

**This information is DUE to the District office
90 days before your Innovations Weekend.**

Required Documents	Who will prepare	Completed
Breakthrough Prayer		
Brief church history (3-5 pages or video)		
Church Involvement		
Current lay leadership roster (committees, teams and years served)		
Chart of church structure and how committees/teams relate		
Real Discipleship Survey Results		
Communications		
2-3 recent bulletins from this year		
Newsletter samples (print & electronic) from the past year		
List of Social Media Accounts		
Website address		
Communications Plan; if there is one		
Demographics		
Mission Insite Report (provided by DO)		
Church attendee database sent to District NLI (People Plot)		
Comparative Index Report (requires church database information)		
Community Interviews from "Gospel" study		
Financial Information		
Detailed Church Budget vs Actual for past 3 years (income statement & balance sheet)		
Financial Analysis (see attached)		
Ministry Focus Event Reflection		
Mystery Worshiper Reports (provided by DO)		
Pastors and Staff		
List of pastors & years served from past 10-20 years		
Church staff for the past 10-20 years (with years served & position/title)		
Staff organizational chart		
Preschool/Child Care Information (if applicable)		
Explain the relationship between the church & the preschool. (Ownership, operation, financial subsidiary)		
Explain the connection that preschool/child care families have to the church.		
Statistics from the past 5-10 years in Equipping Vital Congregations (EVC)		
Average Worship Attendance		
Professions of Faith		
Number of Small Groups		
Giving to missions, church budget, church debt		
Self-Study Summary (completed by the NLI Team after reviewing all materials)		

Financial Analysis

1. **Operating Funds** – Evaluate contributions for operations against expenses for operations for the last three (3) years. Consider whether or not there were enough contributions to the operating fund to cover all of the operating expenses. What impact does this have to the ministry of the church?
2. **Dedicated Funds** – Evaluate the level of dedicated funds (and trends). Did you have significant funds to cover all the mission related or other designated expenses that you incurred? Were you able to fund all that you desired to do? Do you have significant money in designated funds that cannot be deployed? Quantify these amounts.
3. **Cash** – Operating Cash, Savings, other Investments – Evaluate the sufficiency of amounts in the church’s bank accounts. Do you have adequate cash resources to meet all your obligations on a timely and consistent basis? Explain.
4. **Endowment Funds** – What amount of endowment funds does your church have? What percentage of Endowment funds is being spent annually? On what? Do you actively campaign for endowment fund contributions? Why or why not?
5. **Facilities** – Are there adequate funds to maintain or make improvements to your facility? Explain.
6. **Debt** – What is the level of debt (line of credit, loans for building or property and equipment, other) held by the church? Is the church able to service the debt annually? What is the plan to pay off old debt before any new debt is incurred? What is the impact of the debt on the church’s ability to live out their mission?
7. **Capital campaigns** – What capital campaigns have you had in the past? What are your plans for future campaigns? Explain
8. **Top 20 Contributors** - List out the top twenty annual gift amounts for the past three (3) years with approximate age at the time of giving (without names). What percentage of the church budget is met by the top ten gifts? The top twenty?
9. **Age Demographic Financial Stewardship** – Create an analysis that identifies giving by age demographic groups, 20s, 30s, 40s, all the way up to 90+. What trends do you notice? How might these trends impact the mission and ministry of your church?
10. **Individual Financial Stewardship** – Create a schedule of all individual contributions to the church. What trends do you notice? Is there a smaller group of donors that is giving a larger percentage of contributions? Divide your total giving by the number of attendees, for the past three (3) years. What trends can you identify, and how does it impact your ministry?
11. **General Stewardship** – How is the annual budget discerned? Describe your annual financial stewardship process and assess its effectiveness. What works well, what can be improved? How does this impact your mission and ministry?



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

1. List the "We Believe" statements formed out of the "Gospel" Study done by your leadership and/or congregation.
2. What stood out to you as you put this self-study together?
3. What trajectory do you see for your church based upon the self-study?
4. On a scale of 1 to 10, 1 being most unlike and 10 an exact match, how well does your church match your neighborhood? What are your reasons for that score?
5. Is there a recurring problem or conflict? (topic, ministry area, staff position)
6. What works well in your church?
7. What does your church need to learn?
8. What would a newcomer think of your church?
9. Is there anything else you would like to highlight for the weekend team?