

Financial Viability Review

Community of Faith: _____

Date: _____

1. Do your expenses exceed your revenues? *(Please fill in all years)*

Year	Revenues	Amount given through offerings	Amount given through PAR	Expenses	Do expenses exceed revenues? (yes/no)	Bank balance at end of year
Current year	\$	\$	\$	\$		\$
One year ago	\$	\$	\$	\$		\$
Two years ago	\$	\$	\$	\$		\$
Three years ago	\$	\$	\$	\$		\$
Four years ago	\$	\$	\$	\$		\$
Five years ago	\$	\$	\$	\$		\$

Comments:

Please include any comments you think are pertinent to your consideration—renovations, special fundraising, money that comes in as revenue but you really don't have use of because it goes out to organizations, GICs, term deposits, memorial fund, support of M&S, no minister, or minister on sabbatical. These comments help you understand why expenses might grow one year and revenues another.

A recent financial statement should be appended to this document.

2. Payroll Costs:

We have the present staff:

(F – Full-time; P – Part-time; V – Voluntary; H – paid an Honourarium)

Minister: _____ ; Secretary: _____ ; Custodian: _____ ; Musician(s): _____ ;

Sunday School Teacher(s): _____ ; Other: _____

Cost of payroll (\$ paid plus employer contributions (EI, etc.) for everyone.

Current year	One year ago	Two years ago	Three years ago	Four years ago	Five years ago
\$	\$	\$	\$	\$	\$

Cost of Pulpit Supply.

Current year	One year ago	Two years ago	Three years ago	Four years ago	Five years ago
\$	\$	\$	\$	\$	\$

3. Have you experienced a deficit for more than two consecutive years in the last five years? ____

4. Are there any outstanding loans? _____

5. Do utilities, maintenance, and repairs exceed 25% of revenues?

Year	Utilities (Power & Water)	Fuel	Maintenance	Total	Exceeds 25% of Revenues (Yes or No)
Current year	\$	\$	\$	\$	
One year ago	\$	\$	\$	\$	
Two years ago	\$	\$	\$	\$	
Three years ago	\$	\$	\$	\$	
Four years ago	\$	\$	\$	\$	
Five years ago	\$	\$	\$	\$	

6. How many contributors support your congregation?

Current year	One year ago	Two years ago	Three years ago	Four years ago	Five years ago

7. How many contributors would you have in each age group this year?

0-20 years	
21-30 years	
31-40 years	
41-50 years	
51-60 years	
61-70 years	
71-80 years	
81+ years	

8. Is there a reliance on a few generous contributors where 50% of the revenues come from one or two contributors? Contributors and Givings:

Annual giving	Current year	One year ago	Two years ago	Three years ago	Four years ago	Five years ago
\$0-\$100						
\$101-\$500						
\$501-\$1,000						
\$1,001-\$5,000						
\$5,001+						

9. Have you taken part in a stewardship project (campaign) in the past two years?

☐ No project

☐ Letters to congregation when we have the need

☐ Regular information and letters sent to all members and adherents

☐ Program such as *Called to Be the Church* with information during worship, letters, and a request for commitment

☐ Program and information presented at a congregational get-together

☐ All-member visitation

☐ Other

If you did, what were the results? _____

Have you encouraged members, yearly or more regularly, to increase PAR givings? Yes / No _____

10. Please list any investments, special funds, and other monies your community of faith holds. What are the rules/restrictions around the use of those funds?

Thinking about the Data You Have Collected

The covenant with a minister that you call or appoint is seen to be at least a three-year commitment or for the full duration of the appointment. Show how you will be able to meet that commitment.

Treasurer's observations:

Search team's observations (if separate from above):

RECOMMENDATIONS

Now that you have all of this information, what is your plan for ministry (ministry stream, highest category you feel you can afford, full or part-time)?

Recommendation of search team, treasurer, and governing body:

_____ community of faith is viable to appoint or
call a minister in Category _____ for _____ hours per week.