

Church Financial Health Assessment

Does your church have at least 3-6 months of budget in cash reserves/savings?

Y N

Y N

Is your church's cash reserve earning competitive rates?

Y N

Y N

Does your church produce charitable receipts at least annually?

Y N

Y N

Is your church's system for correctly handling payroll and taxes efficient and accurate?

Y N

Y N

Is your church minimizing the pastor's taxable income-housing allowance and handling reimbursements properly?

Y N

Y N

Is your church properly accounting for undesignated and designated/restricted funds?

Y N

Y N

Is your church's budgeted revenue consistently more than budgeted expenses?

Y N

Y N

Does your church have an emergency fund? (i.e., for insurance deductible, roof replacement, A/C unit replacement, etc.)

Y N

Y N

Does your church have ample check signers with the appropriate number required for approval?

Y N

Y N

Does your church have a backup if any financial volunteer/paid financial administrator (i.e., treasurer) was abruptly unable to serve?

Y N

Y N

Is your church's accounting process/system able to produce timely reports?

Y N

Y N

Is your church's annual budgeting process effective and meaningful?

Y N

Y N

Is your church preaching/teaching on the importance of biblical giving as a vital part of discipleship?

Y N

Y N

Does your church allow for multiple ways of giving/donating?

Y N

Y N

Does your church systematically back up financial data and keep offsite?

Y N

Y N

Check your score based on your number of "YES" responses.

- | | |
|---------|-----------|
| 1 → 6% | 8 → 53% |
| 2 → 13% | 9 → 60% |
| 3 → 20% | 10 → 67% |
| 4 → 27% | 11 → 73% |
| 5 → 33% | 12 → 80% |
| 6 → 40% | 13 → 87% |
| 7 → 47% | 14 → 93% |
| | 15 → 100% |

If the Louisiana Baptist Foundation can help you improve your church's financial health, please let us know!



877.523.4636
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LBInfo.org



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