

Annual Stewardship Assessment Tool

The categories in this Annual Assessment Tool are based on the *7 Steps to Parish Success* (USCCB). Items that are marked * indicate assessment questions the International Catholic Stewardship Council specifically reviews when determining the Annual Archbishop Thomas J. Murphy Parish Stewardship Award (ICSC).

Date:

Parish Name:

Last Assessment Completed on:

Completed by:_____

Personal & Lay Testimonies					Once a year	Twice a year	More than once a month	Great idea, Let's start!	
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* How often does your parish use lay testimonials:

* For the gift of time and talent?

☐ ☐ ☐ ☐

* For the gift of treasure?

☐ ☐ ☐ ☐

* How often does your parish use testimonies from?

* Clergy

☐ ☐ ☐ ☐

* Deacon

☐ ☐ ☐ ☐

* Children

☐ ☐ ☐ ☐

* Youth

☐ ☐ ☐ ☐

* Family

☐ ☐ ☐ ☐

Personal & Lay Testimonies

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Commitment of Leadership	Yes	No	Goal for next year?
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* Does your parish have an annual stewardship plan in place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have an annual commitment Sunday?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(For ICSC, it is required that a parish have 5 consecutive annual commitment Sundays)			
* Is stewardship a frequent topic in the bulletin?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Is stewardship a frequent topic in announcements after Mass?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Is stewardship a frequent topic in the pastoral letter sent to the home?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have a stewardship committee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does the Pastoral Council understand & support the spirituality of stewardship in the parish?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your Pastoral Council discuss stewardship as a regular part of it's agenda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish have a parish mission statement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish utilize the diocese's stewardship resources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish focus on stewardship in the homilies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish focus on stewardship in the prayers of the faithful?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish focus on stewardship during the offertory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish have a system in place to remain transparent and accountable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is stewardship incorporated in the mission of the parish?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish participate in diocesan stewardship events?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your church belong to International Catholic Stewardship Council?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does someone from your parish attend the International Catholic Stewardship Council Conference annually?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the Finance Council understand & support the spirituality of stewardship?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the Pastoral Staff understand and support the spirituality of stewardship?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Commitment of Leadership

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Hospitality, Evangelization & Outreach	Yes	No	Goal for next year?
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|---|--------------------------|--------------------------|--------------------------|
| * Does the parish share treasure with the outside community? (Sacrificial Giving) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| * Does the parish provide services to the community? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| * Does your parish have volunteers that serve in the community? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| * Does your parish have an annual ministry fair? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your parish have a welcome committee? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your parish regularly follow-up with guests? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your parish have a system in place to insure that follow-up on inquiries are completed in a timely manner? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Hospitality, Evangelization & Outreach

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Communication and Education	Yes	No	Goal for next year?
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* Does your parish have a Stewardship committee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish make good use of this committee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* To promote stewardship does your parish use:			
* audio-visual media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* banners/posters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* bulletin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* web site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* newsletters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* retreats, classes or small group workshops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have a:			
* stewardship brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* ministry catalog in print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* ministry catalog on your webpage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your ministry catalog updated annually?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have a stewardship element in:			
* catechesis programs for children?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* catechesis programs for parish schools?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* the RCIA program?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Returning Catholics program?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* adult formation programs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* religious programs for adults?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* catechesis programs for youth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* teenage and Confirmation program?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish promote their stewardship events in The Catholic Voice?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish post a calendar of training opportunities on the webpage?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish offer a calendar of training opportunities in print?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Are there educational resources on stewardship on your website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Is there stewardship information in new parishioner packets?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have ongoing educational opportunities for your Stewardship Committee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communication and Education	Yes	No	Goal for next year?
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Does your parish feel education of stewardship in children is a priority in your parish? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish regularly advertise children's ministry opportunities? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish regularly assess the needs of your parish in the area of education of stewardship? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish communicate opportunities for parishioners to share time, talent and treasure? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish offer culturally diverse educational activities? ☐ Yes ☐ No ☐ Goal for next year?

Does parish leadership and ministry chairs participate in the diocesan annual stewardship education program. ☐ Yes ☐ No ☐ Goal for next year?

Does your parish use Diocesan resources for stewardship education? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish provide ministry training for all parish ministries? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish have ministry roles and responsibilities descriptions? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish offer small groups? ☐ Yes ☐ No ☐ Goal for next year?

Is your pastor the primary communicator of stewardship in your parish? ☐ Yes ☐ No ☐ Goal for next year?

* Give examples of who stewardship is included in your faith formation programs.

* Are there other ways you promote stewardship that are not listed?

Communication and Education

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Selecting, Training, & Recognizing Gifts of Time & Talent	Yes	No	Goal for next year?
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* Does your parish have an annual commitment Sunday or commitment cards?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have ongoing communication about ministry opportunities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have ministries listed on website or catalog?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Is your ministry catalog updated on a yearly basis?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have procedures in place to ensure you follow-up with volunteers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish use lay witnesses to promote gifts of time and talent?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have an annual ministry fair?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish regularly recognize volunteers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish send thank you letters to volunteers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have specific thank you events for volunteers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* How have you shown volunteers appreciation this year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish use the <i>"Living Your Strengths"</i> (Winseman) process for parishioners to recognize their talents?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish use <i>"Called and Gifted"</i> (Catherine) discernment process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish use any other process to help parishioners recognize their talents?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish have a gifts coordinator?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish offer ongoing opportunities for training and educating volunteers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish provide initial orientation for all volunteers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Selecting, Training, & Recognizing Gifts of Time & Talent

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Stewardship of Treasure	Yes	No	Goal for next year?
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* Does your parish give a portion of it's treasure sacrificially to the needy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish offer planned giving opportunities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have special collections for poor and other causes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Does your parish have an annual renewal Sunday?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish offer Planning Giving, Estate and Will planning workshops?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you aware of the multicultural norms for giving of treasure?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are children allowed to present their stewardship gift to the pastor during the offering?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish provide children/youth stewardship envelopes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish send end-of-year thank you letters regardless of the amount given?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your parish provide ongoing teaching on sacrificial giving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Stewardship of Treasure

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Accountability

Yes

No

Goal for
next year?

- * Does your parish have an annual plan? for ICSC, a copy is required) ☐ Yes ☐ No ☐ Goal for next year?

For the next questions, ICSC requires a narrative/numerical format of the past 5 years that includes details on the records. Measurable changes are suggested whether in numerical format or narrative format.

- * Does your parish keep records of the parish's general financial status? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the Sunday offertory amounts? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the overall parish income? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the number of households registered? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish keep records of the number of members registered? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the number of ministries available? ☐ Yes ☐ No ☐ Goal for next year?

- * Have the numbers of ministries increased in the last 5 years? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the number of volunteers? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the number of volunteer hours? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of any measurable increase of volunteer service in the local community from year to year?(hrs & # of volunteers) ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of any measurable increase of financial support of the local, national and universal church? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the number and type of new ministries available? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records about the amount of communication about stewardship? ☐ Yes ☐ No ☐ Goal for next year?

- * Does your parish keep records of the types of communication about stewardship? ☐ Yes ☐ No ☐ Goal for next year?

- * How has there been a measurable increase in the volunteer service of your parishioners in your local community? ☐ Yes ☐ No ☐ Goal for next year?

- * How has there been a measurable increase in the financial support of the local, national, and universal church? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish provide an annual financial report in understandable terms? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish evaluate your stewardship effort on an annual basis? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish have financial statements available upon request? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish regularly communicate finances in addition to the annual report? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish do an annual mailing of family financial contributions? ☐ Yes ☐ No ☐ Goal for next year?

Does your parish provide quarterly mailed updates of family financial contributions? ☐ Yes ☐ No ☐ Goal for next year?

Accountability

What were the parish's goals from last year?

Was the parish successful in completing these goals? Why or why not?

What are your goals for the upcoming year?

Other comments and notes of interest.

Stewardship SWOT Analysis

Strengths	Personal & Lay Testimonies	Commitment of Leadership	Hospitality, Evangelization & Outreach	Communication & Education
What are your parish's advantages?				
What does your parish do well every single time?				
Name & then describe ministries that are well managed and meet the most needs of the community?				
What is your parish's most proudest moment?				

Stewardship SWOT Analysis

Weaknesses	Personal & Lay Testimonies	Commitment of Leadership	Hospitality, Evangelization & Outreach	Communication & Education
What areas are your parish avoiding?				
Where does your parish lack resources?				
What is your parish doing poorly?				
Where are you losing money or not meeting the needs of the community?				
What needs the most improvement?				

Stewardship SWOT Analysis

Opportunities	Personal & Lay Testimonies	Commitment of Leadership	Hospitality, Evangelization & Outreach	Communication & Education
List any beneficial trends?				
Are there niches that other Catholic parishes or other local churches are missing?				
List any new technologies?				
List any new tools, publications or resources.				
List new demographics in the area.				

Stewardship SWOT Analysis

Threats	Personal & Lay Testimonies	Commitment of Leadership	Hospitality, Evangelization & Outreach	Communication & Education
List any obstacles to overcome.				
List any aggressive competitors.				
List any successful competitors.				
Describe any current negative economic conditions.				
Does the parish have any particular vulnerabilities?				
Describe any changing business climates..				

Stewardship SWOT Analysis

Strengths	Recognizing Gifts of Time & Talent	Recognizing Gifts of Treasure	Accountability
What are your parish's advantages?			
What does your parish do well every single time?			
Name & then describe ministries that are well managed and meet the most needs of the community?			
What is your parish's most proudest moment?			

Stewardship SWOT Analysis

Weaknesses	Recognizing Gifts of Time & Talent	Recognizing Gifts of Treasure	Accountability
What areas are your parish avoiding?			
Where does your parish lack resources?			
What is your parish doing poorly?			
Where are you losing money or not meeting the needs of the community?			
What needs the most improvement?			

Stewardship SWOT Analysis

Opportunities	Recognizing Gifts of Time & Talent	Recognizing Gifts of Treasure	Accountability
List any beneficial trends?			
Are there niches that other Catholic parishes or other local churches are missing?			
List any new technologies?			
List any new tools, publications or resources.			
List new demographics in the area.			

Stewardship SWOT Analysis

Threats	Recognizing Gifts of Time & Talent	Recognizing Gifts of Treasure	Accountability
List any obstacles to overcome.			
List any aggressive competitors.			
List any successful competitors.			
Describe any current negative economic conditions.			
Does the parish have any particular vulnerabilities?			
Describe any changing business climates..			

References:

"Called and Gifted." *Catherine of Sienna Institute*. 2009. 3 June 2010
<<http://www.siena.org/Called-Gifted/called-a-gifted.html>>

United States Conference of Catholic Bishops (USCCB). *Stewardship: A Disciple's Response*. Wash. D.C.: USCCB, 2002.

Winseman, Albert, Clifton, Donald, and Liesveld, Curt. *Living Your Strengths*. New York, NY: Gallup, 2008.

