

A Checklist for the Financial Secretary

The administration of financial gifts in the life of a congregation includes occasions when pastor involvement is appropriate. This checklist provides a guide for communication between the financial secretary and the pastor of the congregation.

In the processing of offerings and gifts to the church, the financial secretary should advise the pastor if anything raises questions or if any of the following occur:

Changes in giving patterns:

- Giving stops without explanation
- Giving shifts from annual to monthly or monthly to annual
- Giving patterns shift in consistency or become complete erratic
- Regular weekly giver suddenly stops giving
- Regular offering decreases and special giving increases (diversion of money)
- If dated envelopes are used, the dates are consistently out of order

Changes in presentation:

- Consistent errors in the numerical and written amounts
- Portion of the check is consistently left blank
- Handwriting changes significantly or appears to be written by someone else, for example, an adult and child
- Actual giving does not reflect estimate of giving
- Offering is significantly less than estimate of giving or there is a sudden decrease
- Offering is significantly more than estimate of giving



Estimates Issues

- Dramatic change in estimate of giving (increase or decrease)
- Estimate of giving I revoked or not turned in
- Comments are included with instrument of giving

Adapted from a story by Todd A. Adams, Christian Church (Disciples of Christ)

Please encourage your leaders and congregations to support the World Service Fund apportionment at 100%.