

Instructions for Table 1

LOCAL CHURCH REPORT TO THE ANNUAL CONFERENCE

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Lines 1-4 below capture your local church's membership changes for the reporting year.

- 1** Enter here the figure reported on Line 9 of last year's Local Church Report. Do not use this line to correct the previous year's report. If possible, this line should be provided by the annual conference statistician.
- 2a** No Directions Available
- 2b** No Directions Available
- 2c** No Directions Available
- 2d** No Directions Available
- 2e** No Directions Available
- 2f** No Directions Available
- 3a** No Directions Available
- 3b** No Directions Available
- 3c** No Directions Available
- 3d** No Directions Available
- 3e** No Directions Available
- 3f** No Directions Available
- 4** Enter here the figure reported from calculating  $1 + (2a+2b+2c+2d+2e+2f) - (3a+3b+3c+3d+3e+3f) = 4$ . Affiliate, associate, and baptized members (who have not yet become professing members) should not be counted as professing members.

On the following lines, report for each member the racial/ethnic group with which she or he identifies, or to which she or he is regarded in the community as belonging. All examples should be understood as a selection and not an inclusive list. Each member should be included in only one group. The total in Line 5 must equal total membership in Line 4.

\*Note: The data gathered here is used for groups that offer educational resources and tailored ministries. While we are certainly all one in Christ, it is important to value our members' racial and ethnic identities and report this information as accurately and completely as possible.

- 5a** Members with ethnic origins in East or South Asia (this includes the peoples of Bangladesh, Bhutan, Cambodia, China, India, Indonesia, Japan, Korea, Laos, Malaysia, Mongolia, Myanmar, the Philippines, Pakistan, Singapore, Sri Lanka, Taiwan, Thailand, Tibet, and Vietnam).
- 5b** Members with ethnic origins in Africa or those who identify themselves as "African American." This includes the African Diaspora in the Caribbean, Latin America, and North America.

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- 5c Members with ethnic origins in Latin America (including Mexico, Central America, and the Spanish-speaking islands of the Caribbean). This ethnicity includes persons whose racial heritage is either European or African.
  - 5d Members with ethnic origins in indigenous America (including Aleut, Inuit, Micmac, Ojibwa, Mayan, Miskito, etc.) and/or who maintain cultural identification through tribal affiliation or community recognition.
  - 5e Members with ethnic origins in the Pacific Islands (including Fiji, Guam, Hawaii, Marianas, Micronesia, Papua, Polynesia, Samoa, Solomon and Tonga, Vanuatu, and Tuvalu).
  - 5f Members with ethnic origins in Europe, including its various ethnicities.
  - 5g Members with ethnic origins in two or more of the other six categories.
  - 5 No Directions Available

On the following lines, report for each member the gender with which she or he identifies. The total of the numbers entered in these two spaces must equal the membership total in Line 4.

- 6a No Directions Available
  - 6b No Directions Available
  - 6 No Directions Available
  - 7 Report average in-person attendance at all services held on a consistent weekly basis as the primary opportunity for worship. Count all persons (including children) who participate in part of any of these services. Do not include online worshippers nor attendance from irregularly held special services (i.e. Christmas Eve services).
  - 7a Report here average weekly number of unique viewers who access worship online. This includes those live streaming your worship service and views/downloads of recorded worship services (audio or video), sermons, and/or podcasts. Do not include generic hits/visits to your website.
  - 8a No Directions Available
  - 8b No Directions Available
  - 8 No Directions Available
  - 9 Report the cumulative total of all persons who have been baptized, but have not yet made an official profession of faith into full membership (i.e. not included in Line 4's total membership). DO NOT INCLUDE persons who have been removed from professing membership by withdrawal or charge conference action, though they remain baptized members.
  - 10 Report the number of all unbaptized children, church school members, and others who are not members of the church but are in relationship with the congregation and for whom the local church has pastoral responsibility. These persons should be recorded in your church's Constituency Roll.
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Enter on the following lines the total number of persons who have been participating significantly in any and all of the church's Christian formation groups or small group ministries. Count participants only once, even if they participate in more than one group. Include leaders of each age in that category (i.e. an 18-year-old leader is counted as a young adult). Christian Formation Groups are primarily Sunday morning groups, but may also include other classes and small groups that enhance participants' knowledge and experience of the Bible, spiritual life, and Christian nurture (§256.1a-d). Include groups sponsored by other agencies (Scouts, etc.) only if wholly integrated with the church's education ministry.

11a No Directions Available

11b No Directions Available

11c No Directions Available

11d No Directions Available

11 No Directions Available

No Directions Available

12 Report the number of persons of all ages who have participated in confirmation preparation classes during the year. If they were confirmed and became official church members, these persons should also be reported on Line 2b.

13 Report here the average weekly attendance figures for all sessions of education classes and groups that meet in Sunday Church School groups.

14 Report here the number of individual students attending this church's Vacation Bible School or similar activity, including Vacation Bible Schools conducted in cooperation with other churches.

15 Report here the total number of classes and other small groups held each week in Sunday Church School through all or most of the year.

16 Report here the total number of classes and small groups held each week at times other than Sunday Church School, including small groups that meet in places other than the church building. Examples include (but are not limited to) singles/couples groups, health ministries, Bible studies, book clubs, choirs and other musical groups that perform music in worship.

17 Report here the total number of classes or groups that meet less than all or most of the year. Do not report groups reported in Line 16. Include Covenant Bible Study classes. Examples include (but are not limited to) short-term educational series, financial classes, health ministries and support groups, and seasonal musical worship groups.

18a Report here the total number of men participating in men's ministry programs as reported by the UMM president.

18b Report amounts paid for local church and community projects or programs, or for other projects and programs selected by the group.

19a Report here the total number of members in the local organization as reported by the president.

19b Report amounts paid for local church and community projects or programs, or for other projects and programs selected by the group. DO NOT INCLUDE money sent by UMW to the district or conference treasurer for United Methodist Women mission.

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The following lines intend to gauge your church's mission involvement. Please note: For Lines 21a-21b, refer to the UMC's Four Areas of Focus if you need help determining the focus of a ministry. Please note that these numbers do not total. If a ministry fits into more than one category, count it twice. For Lines 21-23, use this example: Your church hosts a prayer breakfast for the community. Fifty church volunteers serve on teams to prepare and serve food, advertise the event, and drive attendees; 500 people from the community attend. In this case, you would record 50 in Line 22, 500 in Line 23, 1 in Line 21, 1 in Line 21a, and 1 in Line 21b.

- 20a** Report ONLY those teams affiliated with United Methodist Volunteers in Mission.
- 20b** Report ONLY those persons sent out with teams affiliated with United Methodist Volunteers in Mission.
- 21** Enter the total number of different ministries sponsored by your church (i.e. revivals, community events, food banks, homeless shelters, legal services, community nurse, prison ministry) that are offered to the community as a means of outreach, social justice, and/or mercy.
  - 21a** No Directions Available
  - 21b** No Directions Available
- 22** Report the number of individual persons who participated on behalf of your church in ministries that intend to transform people in your local community, the region, and the world. This number should include those involved in any ministry the congregation officially supports, including local food programs, mission teams, disaster response, and/or other mission efforts. Count each person only once. Include persons reported in Line 20b.
- 23** Enter the total estimated number of persons served by or who attended ministries counted in Line 21.

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No Directions Available

- 24** Enter the estimated market value of buildings, parsonages, vehicles, and equipment plus the value of parsonage-related assets. If a parsonage is in a charge of more than one church, list parsonage-related assets only on the report of the church where parsonage is located. If property is held by a multi-church charge in common (rather than by an individual church) a share of the value should be assigned to each church according to its percentage of total professing membership within the charge unless a specific percentage of commonly-held property has been otherwise designated. Congregations are not obligated to initiate property appraisals in order to provide this estimate.
- 25** Enter the estimated market value of cash, stocks, bonds, trusts, securities, investments (including endowments) belonging to the church, including money raised or donated and held for future building programs or any other special purposes, and all property and other investments not included elsewhere. Include any liquid reserve funds in this line.
- 26** Enter the amount of debt currently held by the church that is secured by church property and assets, such as mortgages.
- 27** Enter the total of all debt currently held by the church that is not secured by church property assets, such as credit cards, lines of credits, and lease-to-purchase agreements. The sum of Lines 26 and 27 should equal the total debt currently held by the church.

The reported expenditures on Lines 29a through 49 should equal the total amount of money (cash value) spent by the local church for the fiscal year (Line 50). All expenses should be allocated only once. Please see [umcgiving.org](http://umcgiving.org) for more information on UMC Special Funds.

- 28a** This amount should include the total for all district, annual conference, jurisdictional, and general church funds apportioned to the local church to be remitted to the annual conference treasurer. This should be provided by the conference treasurer.
- 28b** This amount should include the total of all funds apportioned separately by the district. DO NOT INCLUDE any amounts apportioned to the local church included in 28a.

The following lines record giving from the local church for all benevolent causes, including apportioned giving and direct giving. Values for lines provided by the conference and may be hidden from view. If shown, an asterisk (\*) designates funds paid to the annual conference treasurer that will be provided by the Annual Conference Treasurer. Please contact your conference if you have any questions about these lines.

- 29a** This amount should include the total given by the local church to the annual conference treasurer for all district, annual conference, jurisdictional, and general church apportioned funds.
- 29b** This amount should include the total given to all causes apportioned by, and paid directly to, the district. DO NOT INCLUDE any amounts given to the annual conference treasurer for conference-apportioned causes.
- 30** No Directions Available
- 31** No Directions Available
- 32** No Directions Available
- 33** No Directions Available

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- 34** Report any other non-apportioned funds sent to the annual conference treasurer for connectional mission and ministry not otherwise reported on Lines 29a through 33, including non-apportioned giving to higher education and health and welfare ministries.
- 35** No Directions Available
- 36a** No Directions Available
- 36b** No Directions Available
- 36c** No Directions Available
- 36d** No Directions Available
- 36e** No Directions Available
- 36f** No Directions Available
- 37** Report here monies paid directly by the local church to UMC-related institutions and causes. DO NOT INCLUDE any amounts sent to the Treasurer in your annual conference. Those monies should be reported on Lines 30 to 36.
- 38** Report here monies paid directly by the local church to local benevolence or community organizations not directly related to the United Methodist Church.

Please include all amounts paid directly to clergy and staff, as well as amounts paid on behalf of the church for clergy and staff.

For 39 and 40, DO NOT INCLUDE any monies paid for the benefits of church staff not serving as a pastor, including those appointed by the bishop to specialized ministries. DO NOT INCLUDE any amounts deducted from clergy salaries and paid on their behalf.

- 39** This amount should include the total paid by the local church for ministerial benefits, excluding health.
- 40** This amount should include the total amount paid by the local church for ministerial health benefits.

For the following lines, enter the total amount of compensation paid, including funds provided by the district or conference, including tax-deferred amounts and/or any "cafeteria plan" contributions. Funds received (income) by the church from the conference or district shall additionally be reported on Table 3. Do not reduce the compensation by the utility exclusion that is elected by the pastor under Internal Revenue Code 107. Do not include housing allowance paid in lieu of providing a parsonage. Include this amount on Lines 42a-42c.

- 41a** No Directions Available
- 41b** No Directions Available
- 41c** No Directions Available

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Enter here the total amount paid to/for the following for housing allowances and other housing and utility-related allowances including those for light, heat, furniture, garage rental, service costs (yard work, cleaning, etc.), and any normal expenditures incurred to maintain the parsonage. DO NOT INCLUDE payments on parsonage-related debts, purchase of land, building, remodeling, and major equipment expenditures here. Report those expenses on lines 48 and 49.

42a No Directions Available

42b No Directions Available

42c No Directions Available

43 Enter here the total amount paid to all pastors for accountable reimbursements. This includes any reimbursements of expenses incurred by the pastor(s) based upon a written policy and/or agreement of the church and pastor(s) in which expenses are substantiated through receipts or other documentation and must be presented prior to payment by the church. These include expenses for travel, continuing education, books, publications and other expenses related to supporting the ministry and development of the pastor. DO NOT ENTER reimbursements of expenditures made by the pastor for local church programs and operating expenses here. They should be reported on lines 61 and 62 below.

44 Enter here the total amount paid to all pastors for other cash allowances based upon an agreement of the church and pastor(s). These include allowances for health or other insurance premiums other than those billed or apportioned by the annual conference, travel, continuing education, books, publications, membership dues, and other allowances related to supporting the ministry and development of the pastor. DO NOT ENTER allowances for expenditures made by the pastor for local church programs and operations here. They should be reported on lines 61 and 62 below.

45 Report the amounts paid by the local church as salaries, housing, benefits, expense reimbursements, and allowances for any lay employees who are not diaconal ministers. DO NOT INCLUDE amounts reported on lines 51-57.

Please include amounts paid by the church, as well as amounts paid on behalf of the church, for all program and operating expenses.

46 Report the total of all amounts spent on local church program for the purposes of education, witness, outreach, mercy, communication, worship, and other ministries. DO NOT INCLUDE amounts given to support local or national non-UMC groups and agencies in their programs. Those amounts should be reported on Line 38.

47 Enter the total of current operating expenses, such as office expenses, expenses for property maintenance and insurance, utilities for the church, etc. DO NOT INCLUDE any expenditures already reported on previous lines.

No Directions Available

48 Report here all payments on all loans, mortgages, etc. DO NOT INCLUDE principal and interest on money borrowed and repaid within the current fiscal year. This should be reported on lines corresponding to the purpose for which the money was borrowed.

49 Enter here only amounts paid from contributions, not from loans. Enter any outstanding indebtedness on Lines 38 or 39. Amounts contributed but not paid out (retained for use in future years) should be included on Line 37. Report the cost of new property and buildings, major purchases of new equipment or furnishings (organs or other musical instruments, heating and cooling equipment, kitchen equipment, audio-visual equipment, furnishings) and major renovation. Also include short-term rent.

50 No Directions Available

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Instructions for Table 3

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**51** Report here the number of households or individual persons (i.e. units) recorded by name as contributors for the year in support of the annual budget/spending plan and benevolence giving.

**52** In this section, report income for funds used exclusively in support of the annual budget/spending plan. DO NOT INCLUDE funds intended for capital improvements or acquisitions (report these on Lines 53a to 53d) unless they are provided for within the annual budget/spending plan of the local church. DO NOT INCLUDE funds received from connectional or institutional sources and grants outside of the local church (report these on Lines 54a to 54c). DO NOT INCLUDE income designated for specific benevolent/charitable causes (report these on Line 53d). DO NOT INCLUDE funds put in savings, endowments, or other long-term financial instruments. \*Note the intent of a sale of assets. If designated for church budget, include in Lines 52a to 52g. If planned for other use, report in Lines 53a to 53d.

**52a** Enter here receipts of funds received toward the payment of pledges, estimates of giving, or other commitments establishing a level of giving toward annual budget/spending plan of the church (for example, a member's payments toward an annual pledge). If your church does not conduct financial stewardship campaigns using pledges, please skip this line.

**52b** Enter here this year's receipts from identifiable individuals who have not pledged or provided an estimate of giving in support of the annual budget/spending plan (for example, personal check from a member who did not submit a pledge card in response to the church's stewardship campaign).

**52c** Enter here receipts from unidentifiable individuals used in support of the annual budget/spending plan (for example, loose currency or coins placed in the offering plate).

**52d** Enter here funds allocated toward the annual budget/spending plan earned through interest on deposits or dividends (for example, interest gained on reserve funds invested in money market accounts used to support the annual church budget) or sale of stocks. Any change in the value of existing stocks (not sold) should be reflected in Line 25.

**52e** Enter here funds allocated toward the annual budget/spending plan from the sale of church-owned assets (for example, the sale of discarded church furniture, vehicles, computer equipment, yard sales, etc.). If proceeds from a sale are designated for the church's operating budget, report in Line 52e. If proceeds are intended for other use, report in Line 53c.

**52f** Enter here funds allocated toward the annual budget/spending plan from building use fees and related contributions and rentals (for example, fees collected from weddings for building use).

**52g** Enter here funds received in support of the annual budget/spending plan from special fundraisers and any other sources (for example, net receipts from a pancake breakfast used to support the annual budget).

**52** Enter here the total sum of 52a + 52b + 52c + 52d + 52e + 52f + 52g.

**53** In the lines below, report income for those funds that are designated exclusively for capital campaigns and other special projects. DO NOT INCLUDE funds reported on Lines 52a to 52g above.

**53a** Enter here funds received from capital campaigns and this year's interest from previous campaign balances (for example, receipts from a building renovation capital campaign).

**53b** Enter here funds received this year designated for memorials, endowments, and bequests (i.e., enter the total value initially given only this year). Any rent payments, interest, or dividends earned on previously reported memorials, endowments, or bequests should be recorded in Line 52d or 52f if allocated for budget. Total market value of assets (including reinvested interest or dividends) should be reflected in Lines 24 or 25.

**53c** Enter here funds received from other sources in support of capital campaigns and special projects (for example, sale of church-owned land, buildings, and/or other assets held as deposits for future use).

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**53d** Enter here funds received for benevolent causes including Special Sunday offerings, General Advance and World Service special gifts, Conference Advance Specials and other forms of designated donations given by individuals and forwarded by the local church.

**53** Enter here the total sum of 53a + 53b + 53c + 53d.

**54** In the lines below, report funds received from District(s), Annual Conference(s), Jurisdictional Conference(s), General Church and/or other institutional sources outside the local church. These funds can be used towards operating and benevolence budgets not reported on Lines 52a to 52g above. DO NOT subtract these funds from their corresponding expenses on Table 2. (I.e. equitable compensation funds should be included in amount paid for pastor compensation on Line 41a.)

**54a** Enter here equitable compensation funds received by church or pastor.

**54b** Enter here advance special funds or apportioned funds received by church (for example, pastor salary support from annual conference funds beyond equitable compensation funds).

**54c** Enter here funds received from other sources (for example, grants received from a foundation in support of the church food bank).

**54** Enter here the total sum of 54a + 54b + 54c.

**55** No Directions Available