

UMC Statistical Tables / End of Year Reports

2017-2020 Quadrennium Forms Changes:

1. Renumbered lines and better organization

2. Notes field added (on forms and on Ezra)

Conference/District users can edit notes on Ezra. Notes box on forms can be used by conference for whatever purpose they need.

3. Professions of Faith Change:

To gauge the number of people who join the church through facets other than confirmation classes (i.e. of their own volition), we have added a secondary professions of faith category. We are now collecting “Professions of Faith through confirmation” in addition to “Professions of Faith other than through confirmation.”

4. Ethnicity and Gender Totals Added

5. Ethnicity/Race Description Updates

We worked with GCORR and the various UMC Caucuses to ensure that our ethnicity/race descriptions were current. The most significant change is that “African American/Black” is now “Black.”

6. Online Worship – Brand New Line!

This line was added to collect the number of persons worshipping online, and the description for the original online worship was updated to reflect that it is collecting people worshipping in person. The new line collects the average weekly streams, views, etc. that can be feasibly ascertained by the church.

7. Number of Ministries and Types

To better collect how churches do ministry, we have reorganized this section. The question asking for persons served by community ministries for daycare and/or education has been removed, and we are now asking clearly for:

- a. Total Number of community ministries for outreach, justice, and mercy offered
- b. Number of these ministries that have certain focuses (see below)
- c. Number of persons from the congregation engaged in mission
- d. Number of persons served by community ministries

The questions asking for focus specifically ask:

Of the ministries offered by your church, how many have primary focus on the following:

- a. Improving Global Health (including local and regional health ministries)
- b. Ministering to the Poor/Socially Marginalized

(Note that a ministry can certainly be both and counted in both. The lines are not meant to total the total number of ministries.)

These pertain to the Four Areas of Focus and the Connectional Table's Conference Assessment Tool. Your Conference's DCM should be aware of this.

8. UMCOR Sunday

One Great Hour of Sharing has been renamed *UMCOR Sunday* per General Conference 2016.

9. Pastor/Staff Comp Reorganization and Clarification

Previously, Pastor Compensation and Associate Pastor Compensation were asked for separately, and then Housing benefits were combined, as well as all others. This was not helpful in ascertaining how much churches were actually paying their pastors. In turn, we decided to separate these out so that we now ask for the following separately:

- a. Lead Pastor Compensation – **NOTE:** this is the compensation for the lead/primary pastor, regardless of clergy status. If a church only has a supply pastor, their salary (including any applicable FICA taxes) should be input here. They also should be including the TOTAL AMOUNT paid to the pastor, including any funds received from the connection or other sources. Also note the additional wording of *to/for* to indicate that anything being paid on behalf of the church for the pastor should be included here.
- b. Associate Pastor(s) and other Pastoral Staff Compensation
- c. Deacons Employed in Specialized Ministry Compensation
- d. Lead Pastor (same lead pastor as above) Housing Benefits
- e. Associate Pastor(s) and other Pastoral Staff Housing Benefits
- f. Deacons Employed in Specialized Ministry Housing Benefits

The fields for Pension, Health, Accountable Reimbursements, Cash Reimbursements, and Salary/Benefits (combined) for Church Staff have not been changed, though descriptions have been updated. In addition, Diaconal Ministers' salary/benefits are now included in the line asking for all other church staff salary/benefits.

10. Market Value of Liquid Assets line update

The line previously asking for the "Market Value of all other church-owned assets" has now been updated to collect liquid assets only (which is what the line originally meant to collect). The description has been updated to reflect this.

11. Edited line order for apportionments and direct giving

Instead of grouping amounts apportioned/paid within conference/district, these lines are now in order of amount apportioned by conference, amount apportioned by district, apportionments paid to conference, apportionments paid to district. This leaves the paid amounts as a unit that can be totaled more easily (to show total apportionments paid) and also to group these amounts with other church giving.

Instead of being in the middle of UMC funds and Special Sundays, direct giving was moved to the end of benevolences for clarity.

12. Number of Giving Units

Formerly “Number of Households giving to the church,” this line is now simplified to record the number of households or individual persons recorded by name as giving. (It’s original description, which was found to be much more straight-forward.)

13. Table 3 Updates and Clarifications:

Several lines on Table 3 have been updated for clarification. Most pertain to the intent of use of funds – if money was transferred from liquid assets to be used for operating expenses/budget, this amount should be reflected in the Market Value of Liquid Assets on Table 2 and reported as “Amount received from interest and dividends and/or transferred from liquid assets” (formerly line 62d and new line 52d) on Table 3.

The line asking for “Amount received from Sale of Church Assets” (formerly line 62e, new line 52e) has been updated to ensure that only amounts allocated toward the budget/spending plan should be recorded here. In turn, “including the sale of buildings” has been added to “Funds from other sources and projects” (former line 63c, new line 53c) to account for sales that are not allocated for the church budget and saved for later use. This also should be reflected in market values.

“Memorials endowments, and bequests” (formerly line 63b, new line 53b) has been updated to indicate that only the total amount of funds received should be included in this line for the year it was received only. The value of the fund should then be reflected in Market Value, and any rent payments, interest, or dividends earned should be recorded in 52d or 52f for budget.

14. Income Total Line Added