

Tips for Entering Year-end Statistics

These tips have been put together to address some frequently asked questions about year-end reports. If you have further questions, please contact your district office or Christa Daro at the conference office.

Table 1

1. This figure is filled in with last year's reported information; you cannot edit it here. Please make corrections using lines 2.a-f and 3.a-f, which total on Line 4.
- 5.a-5.g We understand that you may not have this information on file. Please use your best estimate. This information is used to understand fruitfulness in reaching diverse backgrounds and to help ensure proportionate representation in conference and national groups.
- 7-7.a. Please see the guidance offered by the Office of Finance & Administration with respect to counting attendance. That said, for 2017, you will need to retain whatever method you have been using and the Conference's primary request is that you develop and consistently utilize a method of counting over the course of years.
- 11a-d If a person participates in more than one group, please report them in the category represented by their age. This number is not an average attendance, but a count of the number of people who participate significantly. A youth group of 15 that meets twice a week counts for 15 if it is comprised of the same youth. Suppose you have a group that meets twice weekly. Ten members come to both sessions. Three only come on Tuesday, five come only on Thursday. You will report all 18 as regular participants. Use your best judgment in determining regular participants. Note that short term small groups are recorded on line 17.
- 12-17 Please note that this is the number of CLASSES not participants. In a rotational model, please count the number of groups that rotate, not the number of stations
- 17 This is a new line. These include grief groups or bible studies that only meet on a short term basis.
- 20.a Include only teams sponsored by your church. Not all teams sent in mission qualify as UMVIM.
- 20.b Include all persons affiliated with your church that participated in VIM teams even if those teams were sponsored by another church.
- 21-23 These represent new data requests. Please note that these reflect the new mission as articulated by General Conference and the Council of Bishops.

Table 2

- 24 & 25 Insurance documentation is a good place to start to make these estimates.
- 28.a & 29.a If you are entering through UMCdata, these numbers will be provided. If you are providing paper copies to your district, they will have these numbers on file. You do not need to provide these numbers.
- 28.b & 29.b In Missouri district apportionments should be reported here and not on lines 35.a-35.b.
- 30-35 Money sent to the conference for causes other than apportionments should be listed here by cause.

37. Please report all money sent from the church to United Methodist causes that did not go through the conference.
39. This figure would include pension and CPP expenses for clergy only. Refer to lines 16A,16B and 17 on PSF.
40. This figure includes the local church's share of the "defined contribution" for the clergy person's health insurance only. DO NOT include any amounts withheld from the pastor's paycheck, including amounts of premiums over the defined contribution like dependent portions of the premium. The 2017 figure should be **\$8,760** per clergyperson.
- 39-47 The formula for figuring conference apportionments looks at lines 39 through 47 minus 46a. Please be certain NO CAPITAL EXPENSES are listed in any of these lines. This is the most common error and we find and can greatly affect apportionments. Please also be certain to include amounts paid for expenses related to nursery school, pre-school, after school and mother's day out in 46a. If you are using UMCdata, these amounts will be automatically subtracted from line 46.
- 41a-21c Please use the Compensation & Expenses Supplement to figure these lines. They will not necessarily equal line A of the Pastoral Support forms. Please also note that unlike in previous reporting, local churches are now asked to separate Senior Pastor, Associates and Deacons.
46. This figure should include all costs related to the programming of the local congregation. Do not include amounts listed on lines, 28-45 or 47-50.
- 46.a. Please report the program expenses for all pre-school, nursery school, after-school and Mother's Day Out programs. This amount will not be included in figuring apportionments.
47. List all church operating expenses. Do not list here any amounts reported in other lines.
48. Please report all payments on loans extending beyond the fiscal year. (Short-term loans paid within the fiscal year should be reported in the lines matching their purpose generally 46, 47 or 49.)
49. Enter the amount PAID this year for capital expenses from contributions. (Funds collected for capital expenses, but not yet distributed should be listed in line 25. Funds owed should be listed in lines 26 or 27.)

Compensation & Expenses Supplement

Please refer to your Pastoral Support Form(s) to complete this data. The total of 1, 2, 3, & 4 on this sheet should equal the total of PSF parts A, B & C.

- 1.a PSF line 1
- 1.b PSF line 4
- 1.c Possibly PSF line 2
- 1.d PSF line 3
- 1.e PSF lines 6 & 7
- 1.f PSF lines 5, 9a, 9b and 10 (This includes dependent premiums.)
1. Total lines 1.a-1.f of this worksheet or PSF lines 1, 2, 3, 4, 6, 7, 9a & 9b.
- 2.a PSF line 11
- 2.b PSF line 12
- 2.c PSF line 8
- 2.d Not differentiated on our form, if available please list here and subtract from other lines.

- 2.e Not differentiated on our form, if available please list here and subtract from other lines.
- 2.f Not differentiated on our form, if available please list here and subtract from other lines.
- 2. Total lines 2.a-2.f of this worksheet or PSF lines 11, 12, 8 & any detail amounts available.
- 3.a-4.d These questions ask for the amounts of accountable reimbursements and non-accountable allowances that are part of the pastoral compensation package. Parts of some lines of the PSF may fall under each category.
- 3.a Part of PSF line 13
- 3.b Part of PSF line 13
- 3.c Part of PSF line 13 or 14
- 3. Total of lines 3.a-3.c of this form.
- 4.a Not widely used in Missouri. Include only insurance premiums paid as a church expense.
- 4.b Part of PSF line 13
- 4.c Part of PSF line 13 or 14
- 4.d Possibly part of PSF line 2, 13 or 14
- 4. Total of lines 4.a-4.d on this sheet.

Table 3

- 51. For the purpose of this report, a household is any unit by which contributions are recorded. If Mr. & Mrs. Jones receive separate contribution statements, then they count as two households.
- 52.a This amount should include all income for the annual budget in fulfillment of a pledge, commitment or estimate of giving. If your church does not use pledges, commitments or estimates of giving, please skip this line.
- 52.b This amount should include all income for the annual budget from identifiable givers not giving towards pledges reported in 62a.
- 52.c Loose plate is the term usually used for these gifts that are not associated with an identified donor.
- 52.d The total of interest and dividends allocated to support the annual budget should be listed here.
- 52.e The income from the sale of church assets should be listed here if it will go towards the annual budget.
- 52.f All income from fees and rentals used to support the annual budget.
- 52.g Net receipts from fundraisers to support the annual budget (not special projects).
- 53.a Please include contributions for capital campaigns received this year and the interest on balances held, but not the beginning balance of such funds.
- 53.b This line should include: contributions made for memorials, endowments and bequests; rent from physical properties if it goes to a purpose other than the annual budget; money from the sale of church assets if the funds do not go to support the annual budget or a capital campaign; and interest and dividend income only if it is not reinvested.
- 53.c All other income received for capital campaigns or special projects within the church should be listed here.
- 53.d All money received designated by the donor for benevolent causes and forwarded on to the respective designation should be listed here.

- 54.b Advance Special, apportioned, and connectional funds would include grants or other money received from the district, annual conference, jurisdictional conference or general church other than equitable compensation.
- 54.c Please include any funds received from institutions not already listed in lines 64.a-64.b. This would include funds from the United Methodist Foundation or district extension societies.

Table IV

The items in Table IV are unique to the Missouri Annual Conference. Those in Tables I-III are used by the Conference, but reported to the General Council on Finance & Administration. At times, Conference leadership acknowledges that the requests of Tables I-III, especially the attendance and membership questions in Table I, do not fit well with the typical practices of the Missouri Annual Conference. At times, clergy and lay leaders within the Conference may even find them less than helpful. Many of our most vital churches are already collecting supplemental data to assist them in evaluating the health of their congregations, and Conference leaders felt it was time the Conference took a more careful look.

The following requests are meant to broaden the definition of success, to establish a new “scorecard.” We believe every church, regardless of size, can find “wins” in their community. For some, the annual average worship attendance may not reflect the full impact a congregation is having on the greater community. For many, “membership” data is simply unhelpful. In the following requests, we want to (a) gain a better understanding of what attendance in worship and ministries really looks like; (b) attempt to gain knowledge about the impact churches of all sizes have on their communities; and (c) obtain a few measures to determine the success and impact of new Conference priorities.

As a general rule, those completing Table IV should complete the task diligently, but with flexibility. The following tips are meant only as “tips” or protocols. As with the Conference protocols for counting worship attendance, we encourage churches to be consistent with their own practices, rather than trying to follow some perceived requirement imposed by the Conference. Where the following tips and definitions do not reflect the ministries or practices of your congregation, we encourage you to adapt to the definition to better fit. Be faithful. Complete this with integrity and honesty. But, at the end of the process, understand that this is meant for the local church’s benefit more than the Conference. If our local churches are healthy and having an impact on local communities, then the whole Conference and its churches are healthy and having an impact.

- I.1. Table I already asks for the average worship attendance for each reporting church. And, the Conference has set forth a suggested protocol for counting attendance each Sunday. That said, other data points may well be more helpful as you consider the health of your local congregation. Other data is certainly helpful when the cabinet considers appointments, especially to multi-site congregations. For multi-site congregations, counting by site will provide a much better look into the health and viability of a congregation. A church doesn’t have to be large to have more than one site. If a congregation holds regular worship in a nursing home or for youth (remember the protocols require regularity), then those attendees should count and understanding how the attendance breaks down can be extremely helpful. Enter data for every “site” with regular worship, including nursing homes, youth worship, campus ministry worship, worship in a transitional or homeless ministry, etc.
- I.2. The statistical “mode” is the data point that appears most often in a set. For attendance, it’s the attendance that appears most often in the course of the year. For example, suppose a church with attendance on 10 consecutive Sundays around Easter of: 100, 110, 112, 110, 155, 245, 110, 115, 112, 110. The figure, 110 appears 4 times, and 112 appears twice. All other Sundays had a

different figure reported. The figure of 110, therefore represents the “mode” or the “most commonly observed attendance.” Why do we think this information is important? The average of those 10 Sundays is 128 (the 10 Sundays added and divided by 10). But, that average includes the very high Sunday of Easter. A normal Sunday does not, therefore, have 128 people in attendance. Rather, a typical Sunday has around 110. It isn’t that we don’t want to celebrate the higher attendances. In fact, knowing them is important. And, the higher average reflects this church’s ability to increase attendance significantly on special Sundays. Both types of data provide helpful information for the local church and the Bishop and Cabinet. We’ve just not asked for the mode before. For this question, we want the “mode” for the entire year. So take every Sunday’s attendance, and find the most commonly occurring attendance. Spreadsheet programs like Excel will actually do this for you, but you can also simply count.

- I.3. Whether Easter, Palm Sunday, Mother’s Day or some other great celebration, we want to know the Sunday your church had the highest number of people worshipping. This is worth celebrating. As noted above, it also reflects the potential a church has on special Sundays.
 - I.4. We’re going to focus on the highest, but it would also be helpful to understand the true range of attendance that occurs over the course of the year. This is just a good assessment, albeit a little less pleasant. Remove the Sundays for which there’s an easy excuse like snowstorms, major floods or power outages. But, include those that might be tempting as an excuse like the Super Bowl, softball tournaments, stewardship Sundays or Cardinal/Chief’s playoff games. Find the typical Sunday with the lowest number in church and report it here.
- II. Table I requests *professions of faith* but attaches those to membership in a local church. In the definition used by the greater United Methodist Church, a profession of faith must lead a person to membership in the local church. However, most pastors have experienced individuals who come to a profound experience of faith that leads to a public profession and a positive life change. Here, we’ve adopted the language of “profession of faith” or “commitment of faith.” “Re-commitments” count, too. Sometimes these lead to decisions to join a local church, but at other times, individuals decide to seek membership at another church or your church may have strict requirements leading to membership, requirements for which an individual making a commitment of faith just isn’t ready. That doesn’t make their profession/commitment any less credible or the witness of the congregation leading to that profession/commitment any less potent. Given that, we want to request a count of professions of faith in the broadest possible terms. We believe our churches have more of these than are currently reported, that we’re stronger and more fruitful than we may have thought. We only ask that each individual be counted once even if they might fit more than one category. We also believe the categories to be self-explanatory. If you aren’t sure, pick the “other” category of II.d. Total a-d and report the total in e.
- III. Not every church will have a large number recorded for worship attendance. While we still believe this is one indicator of health, we also recognize that other measures of a congregation’s health may be as or even more important. In fact, if we take the Gospel seriously, impact and engagement in the surrounding community will be much more important than the number of individuals worshipping on Sunday morning. We want our churches to expand their impact into their community. Because of that, we want to know where and how that’s happening. Some of these questions may seem vague or ambiguous. We’ve done that intentionally. Be faithful. Engage the questions with honesty and integrity, but you may

also feel free to report ministries as you deem most appropriate. Try to establish a baseline for future years.

- III.a. We are looking for a count of activities conducted outside the church, but explicitly in the name of the church. Some of these activities will be counted again in Sections IV-VI below. That's ok. This is a broader count. Include any activity like booths at local fairs, car shows, school tutoring programs or AA/NA groups. This might be a worship service, but it must be outside the church's typical setting. The worship service in the church's side chapel might be wonderful, but it wouldn't count here. Report that in part I of Table IV. Worship in a local youth shelter, however, might count here AND in part I.
- III.b. Lots of our churches have formalized partnerships with other nonprofits and ministries. Report these here. It's ok if the partnership reappears in Section IV or VI below. In part (b)(i) we want the number of lives affected. We're specifically looking for the lives outside the church, rather than church participants. That said, this is flexible and you can feel free to make a good faith estimate. In (b)(ii), we want only the partnerships that require direct contact with other people. If the partnership is purely financial or one in which no one from the church ever meets the individuals affected, we don't want them added here. For example, a partnership in which a church sends volunteer tutors or readers to a local school would count. On the other hand, a Buddy Pack program in which the church simply delivers the packs to the school officials would not.
- III.c. This item is really meant as a bit of a catch all. We want to know about any activities that you didn't report in III.b., but that have the congregation and its people in direct contact with others outside. For example, if your church regularly sends groups of people to the laundromat to pay for laundry and talk to people or if you send members the community kitchen to serve and eat with the participants, add those activities here. Those aren't necessarily formalized partnerships, but they are activities of the church impacting the greater community.
- IV. The following items are taken directly from the survey we sent in mid-2018. These items ask for a range of "new places for new people." The definitions may be flexible, but we do ask that you only report (a) new places that include at least one person who is new to the church; and (b) only **new places started in calendar year 2018** (this may overlap with the survey). We strongly prefer that you only add new places that include at least one new person to the church. Within each category, we want to also know the number of unique individuals new to the church (count them only once). General definitions of each category have been established at <https://www.moumethodist.org/newplacesfornewpeople>. They are as follows:
- a. Small Group: A group of 3-12 people that gathers at least twice a month to experience what it means to Know, Care, Grow and Share.
 - b. Recovery Ministry: A group of any size that helps people recover from addictions, e.g., Christian 12-step approach or Celebrate Recovery.
 - c. Missional Community: A group of any size that connects with unchurched people in a neighborhood, community or region around a specific need, e.g., neighborhood block parties

- or “dinner church,” ministering to the needs of homeless persons in an area, providing a safe place for abused women and children, etc.
- d. New Worship Service: A group of 15 or more that meets at least twice monthly to experience the Living God and reach persons not currently involved in a worshipping community.
 - e. New Church of Multi-Site: A new stand-alone body of believers or a new site of an existing congregation created to reach new people.

- V.a. In our understanding, a “leader” or “missional leader” is someone who: (a) moves from meeting God to an active, growing and authentic faith in Jesus Christ; and (b) is identified as a leader and is mentored by another leader; and (c) provides leadership in their local church and/or beyond, and (d) identifies and has begun mentoring a new leader. That in mind, we also know that “real life” sometimes defies definition. Again, when answering this, we ask that you be faithful and honest. Answer with integrity.
- V.b. This is a little more self-explanatory. To be counted, an individual must have attended a Candidacy Summit OR the Part-Time Ministerial Leader Briefing.
- VI. In these questions, we’ve decided to focus our attention on the Pathway Out of Poverty (literacy) initiative, while also exploring how many individuals may have gone to Puerto Rico. If your church has a school partnership, we would like to know a bit more information about that partnership and what it entails.