

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 Bridget Caddell 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.c and 5.c.
- 9.a-9.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.
- 15-19 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. A group that has 10 members that come twice a week, 3 members that come on Tuesdays only and 5 members that come on Thursdays only will count as 18.
- 23-25 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.
- 30.a Include only teams sponsored by your church.
- 30.b Include all persons affiliated with your church that participated in VIM teams sponsored by any church (including your own).
- 32 & 34 These ministries should have significant participation from the community, not just the local congregation.

Table 2

- 36 & 37 Insurance documentation is a good place to start to make these estimates.
- 40.a-40.b, 42-47 and 50-50.f
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.
- 41.a-41.b In Missouri district apportionments should be reported here and not on lines 40.a-40.b.
- 42-47 Money sent to the conference for causes other than apportionments should be listed here by cause.
48. Please report all money sent from the church to United Methodist causes that did not go through the conference.
- 50.a-f List the amount paid for each special Sunday. The total should equal line 47.
51. This figure would include pension and CPP expenses for clergy only.
52. This figure includes the health premiums for the clergy person only. DO NOT include dependent portions of the premium. The 2011 figure should be \$8,760 per clergyperson. (Dependent premiums should be listed as part of line 53 or 54, as directed in the Compensation & Expenses worksheet line 1f.)

- 53-62 The formula for figuring conference apportionments looks at lines 53 through 62 minus 61a. Please be certain NO CAPITAL EXPENSES are listed here; this is the most common error we find and can greatly affect apportionments.
- 53-54 Please use the Compensation & Expenses Supplement to figure these lines. They will not necessarily equal line A of the Pastoral Support forms.
61. This figure should include all costs related to the programming of the local congregation. Do not include amounts listed on lines, 40.b, 41.b-60 or 62-64.
- 61.a. Please report the program expenses for all pre-school, nursery school, after-school and Mother's Day Out programs. This amount should be included in line 61, but will not be included in figuring apportionments.
62. List all church operating expenses. Do not list here any amounts reported in lines 40.b, 41.b-61 or 63-64.
63. 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 61, 62 or 64.)
64. 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 37. Funds owed should be listed in lines 38 or 39.)

Compensation & Expenses Supplement

Please refer to your 2010 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

- 66. 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.
- 67.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.
- 67.b. This amount should include all income for the annual budget from identifiable givers not giving through line 67.a.
- 67.c Loose plate is the term usually used for these gifts that are not associated with an identified donor.
- 67.d The total of interest and dividends allocated to support the annual budget should be listed here.
- 67.e The income from the sale of church assets should be listed here if it will go towards the annual budget.
- 67.f All income from fees and rentals used to support the annual budget.
- 67.g Net receipts from fundraisers to support the annual budget (not special projects).
- 68.a Please include contributions for capital campaigns received this year and the interest on balances held, but not the beginning balance of such funds.
- 68.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.
- 68.c All other income received for capital campaigns or special projects within the church should be listed here.
- 68.d All money received designated by the donor for benevolent causes and forwarded on to the respective designation should be listed here.
- 69.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.
- 69.c Please include any funds received from institutions not already listed in lines 69.a-69.b. This would include funds from the United Methodist Foundation or district extension societies.