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## Table 1 (Membership and Participation)

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**(Title) MEMBERSHIP****1. Total professing members reported at the close of last year**

Enter here the total membership (**formerly Line 9**) of last year's Local Church Report. Do not use this line to correct the previous year's report. This line should be provided by the annual conference statistician.

**2.a. Received this year on Profession of Faith through confirmation****2.b. Received by Profession of Faith other than through confirmation****2.c. Restored by affirmation****2.d. Added by correction****2.e. Transferred in from another United Methodist Church****2.f. Transferred in from a non-United Methodist Church****3.a. Removed by Charge Conference action****3.b. Withdrawn from Professing Membership****3.c. Removed by correction****3.d. Transferred out to another United Methodist Church****3.e. Transferred out to a non-United Methodist Church****3.f. Deceased****4. Total professing members reported at the close of this year**

Enter here the figure reported from calculating  $1 + (2.a+2.b+2.c+2.d.+2.e+2.f) - (3.a+3.b+3.c+3.d+3.e+3.f) = 4$ . Affiliate, associate, and baptized members (who have not yet become professing members) should not be counted as professing members.

**(Title) MEMBERSHIP ETHNICITY**

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.**

**5.a1. Korean**

**Members with Korean origins.**

**5.a2. Chinese**

**Members with Chinese origins.**

**5.a3. Japanese**

**Members with Japanese Origins.**

**5.a4. All other Asians**

Members with ethnic origins in East or South Asia (this includes the peoples of Bangladesh, Bhutan, Cambodia, India, Indonesia, Japan, Laos, Malaysia, Mongolia, Myanmar, the Philippines, Pakistan, Singapore, Sri Lanka, Taiwan, Thailand, Tibet, and Vietnam).

**5.a5. Total Asians**

Add lines 5.a1 + 5.a2 + 5.a3 + 5.a4.

**5.b. Black**

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.

**5.c. Hispanic/Latino**

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.

**5.d. Native American**

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.

**5.e. Pacific Islander**

Members with ethnic origins in the Pacific Islands (including Fiji, Guam, Hawaii, Marianas, Micronesia, Papua, Polynesia, Samoa, Solomon and Tonga, Vanuatu, and Tuvalu).

**5.f. White**

Members with ethnic origins in Europe, including its various ethnicities.

**5.g. Multi-Racial**

Members with ethnic origins in two or more of the other six categories.

**5.h. TOTAL MEMBERSHIP ETHNICITY**

**(Title) GENDER**

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.

**6.a. Female**

**6.b. Male**

**6. TOTAL MEMBERSHIP GENDER**

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**(Title) ATTENDANCE, BAPTISMS, and PARTICIPATION**

**7. Average attendance at all weekly worship services**

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).

**7.a. Number of persons who worship online**

Report 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.

**8.a. Number of persons baptized this year (0-12 Years)**

**8.b. Number of persons baptized this year (ages 13 or older)**

**8. Total number of persons baptized this year (total of 8.a + 8.b).**

**9. Total baptized members who have not become professing members**

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. Number of other constituents of the church**

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.

**(Title) PARTICIPANTS IN CHRISTIAN FORMATION GROUPS (including Sunday School, educational classes, and other small group ministries)**

Enter on these 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.

**11.a. Number of CHILDREN (ages 0-11)**

**11.b. Number of YOUTH (ages 12-18)**

**11.c. Number of YOUNG ADULTS (ages 19-30)**

**11.d. Number of OTHER ADULTS (ages 31+)**

**11. TOTAL number of persons participating in Christian formation groups and other small group ministries (Total of lines 11a-d)**

**12. Total enrolled in confirmation preparation classes this year**

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 2.a.

**13. Average weekly attendance (all ages) in Sunday School or other weekly education classes**

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

**14. Number of participants in Vacation Bible School**

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. Number of ongoing Sunday Church School Classes offered**

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. Number of ongoing small groups, support groups, or classes offered (other than Sunday Church School)**

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. Number of short-term classes, support groups, or small groups offered**

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.

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**(Title) MISSION INVOLVEMENT**

**18.a. Membership in United Methodist Men (UMM)**

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

**18.b. Amount paid for projects (UMM)**

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

**19.a. Membership in United Methodist Women (UMW)**

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

**19.b. Amount paid for local church and community work (UMW)**

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.

**20.a. Number of UMVIM teams sent from this local church**

Report ONLY those teams affiliated with United Methodist Volunteers in Mission

**20.b. Number of persons sent out on UMVIM teams from this local church**

Report ONLY those persons sent out with teams affiliated with United Methodist Volunteers in Mission

The following lines intend to gauge your church's mission involvement. 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 the following, please note 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, and 1 in line 21. Use your best judgment.

**21. Total Number of community ministries for outreach, justice, and mercy offered by this local church**  
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. Of the ministries counted in Line 21, how many focus on global/regional health?**

**21b. Of the ministries counted in Line 21, how many focus on engaging in ministry with the poor/socially marginalized?**

**22. Number of persons from your congregation engaged in mission/community ministries** (please see instructions)

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 20.b.

**23. Number of persons served by community ministries for outreach, justice, and mercy**

Enter the total estimated number of persons served by or who attended 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.

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## Table 2 (Expenses)

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**24. Market value of church-owned land, buildings and equipment**

Enter the estimated market value of buildings, parsonages, and equipment plus the value of parsonage-related assets used in the ministry of the church and the support of its pastor(s). 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. Market value of financial and other liquid assets**

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. Debt secured by church physical assets**

Enter the amount of debt currently held by the church that is secured by church property and assets, such as mortgages.

**27. Other debt**

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.

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*PLEASE NOTE: The reported expenditures on the following lines (28.b + 29.b-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.*

**(Title) Apportioned Funds and other Giving**

**28. Amount APPORTIONED to the local church by the CONFERENCE**

This amount should include the total for annual conference, jurisdictional, and general church funds apportioned to the local church to be remitted to the annual conference treasurer. This number shall be provided by the annual conference treasurer.

**29. Amount PAID by the local church for all apportioned causes to AC Treasurer**

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**BENEVOLENT GIVING**

**\*Designates funds paid to the annual conference treasurer. Values for these lines should be provided by the conference.**

**30. General Advance Specials\***

**31. World Service Specials\***

**32. Annual Conference Advance Specials\***

**33. Youth Service Fund\***

**34. All other funds sent to Conference for connectional mission and ministry**

Report any other non-apportioned funds sent to the annual conference treasurer for connectional mission and ministry not otherwise reported on lines 28.b and 29.b-34c, including non-apportioned giving to higher education and health and welfare ministries.

**35. Annual Conference Special Sunday Offerings**

**36.a. Human Relations Sunday**

**36.b. UMCOR Sunday (formerly One Great Hour of Sharing)**

**36.c. Peace with Justice Sunday**

**36.d. Native American Ministries Sunday**

**36.e. World Communion Sunday**

**36.f. U.M. Student Day**

**(Title) Direct Giving**

**37. Total amount given directly to United Methodist causes (not sent to Conference)**

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 30-36.

**38. Total amount given to non-United Methodist benevolent and charitable causes**

Report here monies paid directly by the local church to local benevolence or community organizations not directly related to the United Methodist Church.

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**(Title) 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. Total paid for direct-billed and/or non-apportioned clergy pension and other non-health benefits**

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

**40. Total paid for direct-billed and/or non-apportioned clergy health benefits**

This amount should include the total amount paid by the local church for ministerial health benefits.

**Total amount paid in base compensation**

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. *The intention is to record the salary of the lead pastor, regardless of ordination. Include any applicable taxes paid for supply pastors in compensation.*

**41a. Base compensation paid to/for the Senior Pastor or other person assigned or appointed in the lead pastoral role to the church** (this person could be an elder, deacon, supply pastor, local pastor, etc., as long as he/she is assigned or appointed to the lead pastor role).

**41b. Equitable Compensation Funds received by Church or Pastor**

“Equitable Compensation” is a term that is used to describe both “Minimum Salary” and “Salary Support”. We pay Equitable Compensation in one or both of these forms. Please include both on this line.

**41c. Net Pastor's Salary**

Should be the base compensation (line 41a) less equitable compensation line 41a(1).

**41d. Base compensation paid/for to all Associate Pastor(s) and other pastoral staff assigned or appointed to the church. Include deacons and other clergy in this role.**

**41e. Base compensation paid to/for any Deacons not included in 41a-d.**

**Total amount paid for housing benefits**

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. Housing benefits paid to/for Lead Pastor or person in lead pastoral role as described in 41a.**

**42b. Housing benefits paid to/for all Associate Pastor(s) and other pastoral staff assigned or appointed to the church. Include deacons and other clergy in this role.**

**42c. Housing benefits paid to/for any Deacons not included in 41a or 41b.**

**43. Total amount paid to/for all persons included in Lines 41a-41c 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. Reimbursements of expenditures made by the individual for local church programs and operating expenses should be reported on Lines 46 and 47.

**44. Total amount paid to/for all persons included in Lines 41a-41c for any other cash allowances (non-accountable)**

Enter here the total amount paid to/for all pastors for other cash allowances which are not substantiated through receipts or other documentation presented prior to payment by the church.

**45. Total amount paid in salary and benefits for all other church staff and diaconal ministers**

Report the amounts paid by the local church as salaries, housing, benefits, expense reimbursements, taxes, and allowances for any lay employees, diaconal ministers, or other staff leaders. DO NOT INCLUDE amounts reported on lines 39-44.

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#### **(Title) OPERATIONS AND PROGRAMS**

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

**46. Total amount spent for local church program expenses**

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-United Methodist groups and agencies in their programs. Those amounts should be reported on line 38.

**47a. Total amount spent for office expenses**

Enter the total of office expenses. Include rent, purchase and leases of office machines & furniture, telephone, computers & printers, postage and consumables (pens, pads, ink etc.) DO NOT INCLUDE any expenditures already reported on previous lines).

**47b. Total amount spent for property, maintenance, utilities etc. for the church** Amounts spent for

church building & grounds for repair, maintenance, property tax, insurance, net pastor moving expenses, lay rent & housing allowances.

**Total amount spent for other local church operating expenses**

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.

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**(Title) DEBT AND CAPITAL PAYMENTS**

**48. Total amount paid for principal and interest on indebtedness, loans, mortgages, etc.**

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. Total amount paid on capital expenditures for building, improvements, and major equipment purchases.**

Enter here only amounts paid from contributions, not from loans. Enter any outstanding indebtedness on Lines 26 or 27. Amounts contributed but not paid out (retained for use in future years) should be included on Line 25. Report what was paid for 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.

**50a. Apportionment Base Data for Non Reporters To be used by Conf. Administrator only.**

This is an agreed amount, between the Conference and the District Superintendent, for the non-reporting church's apportionment base.

**50b. TOTAL CHURCH EXPENSES (Sum of Lines 29 through 49).**

**50c. APPORTIONMENT BASE\*\*\* APPORTIONMENT BASE\*\*\*--ADD LINES 41c,41d,41e,43,44,45,46,and 47a.**

**TOTAL AMOUNT PAID BY THE LOCAL CHURCH ON ALL EXPENDITURES (SUM OF LINES 28b + 29b-49)**

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**Table 3 (Income)**

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**51. Number of giving units**

Report here the number of households or individual persons recorded by name as contributors for the year in support of the annual budget/spending plan and benevolence giving.

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**(Title) Received for annual budget/spending plan**

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-g. If planned for other use, report in lines 53a-d.

**52.a. Amount received through pledges**

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.

**52.b. Amount received from non-pledging, but identified givers**

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).

**52.c. Amount received from unidentified givers**

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).

**52.d. Amount received from interest and dividends and/or transferred from liquid assets**

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.

**52.e. Amount received from Sale of Church Assets**

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 52.e. If proceeds are intended for other use, report in line 53.c.

**52.f. Amount received through building use fees, contributions, and rentals**

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).

**52.g. Amount received through fundraisers and other sources**

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. Total income for annual budget/spending plan.**

Enter here the total sum of 52.a through 52.g

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**(Title) Received for capital campaigns and other designated special projects**

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 52.a to 52.g above.

**53.a. Capital campaigns**

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).

**53.b. Memorials, endowments, and bequests**

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 52.d or 52.f if allocated for budget. Total market value of assets (including reinvested interest or dividends) should be reflected in lines 24 or 25.

**53.c. Funds from other sources and projects, including sale of buildings**

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).

**53.d. Amount received for Special Sundays, General Advance Specials, World Service Specials, Conference Advance Specials and other forms of directed benevolent (charitable) giving**

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. Total income for designated causes including capital campaign and other special projects.**

Enter here the total sum of 53.a through 53.d.

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**(Title) Received from District(s), Annual Conference(s), Jurisdictional Conference(s), General Church and/or other institutional sources outside the local church.**

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.)

**54.a. Equitable Compensation Funds received by Church or Pastor**

Enter here equitable compensation funds received by church or pastor.

**54.b. Advance Special, apportioned, and connectional funds received by church**

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

**54.c. Other grants and financial support from institutional sources**

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

**54. Total income from connectional and other institutional sources outside the local church.**

Enter here the total sum of 54.a through 54.c.

**55. GRAND TOTAL INCOME RECEIVED (Total of 52 + 53 + 54):**