



Peninsula-Delaware Conference

The United Methodist Church



Baltimore-Washington Conference

The United Methodist Church

*2023 STATISTICAL REPORTING
GUIDELINES AND TRAINING
JANUARY 2024*

Agenda



Introductions



Statistical Reports

What we collect

How you report it

Why we collect it



Timelines and Key Dates



A word about accuracy



ACStats – GCFA's Stats Reporting Site



Tables, and Lines and Questions....



Tools & Resources

– **Presenters:**

- **Dave Schoeller**, Director of Business Systems (BWC)
- **John Gauthier**, Applications Administrator / Data Analyst (BWC)

– **Key Personnel:**

- **Paul Eichelberger**, PDC and BWC Treasurer / Dir. of Administrative Service
- **PDC District AAs:**
Andrea Lenker (Delaware District); Crystal Wright (Upper Shore District); Sarah McCoy (Lower Shore District)
- **BWC District Administrators:**
Christine Taylor (Baltimore Metropolitan District); Willine Kamara (Annapolis/ Greater Washington District); Olivia Gross (Washington East/Greater Washington District); Sophie Amer (Central Maryland/Greater Washington District); Tonia Bennett (Frederick District); Kayla Harkcom (Cumberland-Hagerstown District); Charles Carrington (Baltimore Suburban)

Introductions...

Stats: What gets collected & How

- Local church statistics are collected across 3 primary tables
 - Table 1 – Membership and Participation
 - Table 2 – Church Assets and Expenses
 - Table 3 – Church Income
- There are a set of pre-determined questions but annual conferences can add questions and/or provide clarification.
- Statistical data is collected by GCFA via the ACStats website:
<https://stats.gcfa.org>



KEY DATES

- *January 9th – STATS are opened for reporting*
- *January 31st (Midnight) – STATS Reporting Deadline*

“You can’t manage what you can’t measure.” (and the Discipline says we have too...)

- **2016 Book of Discipline**

- *Para 6o6.7: The local church report to the annual conference shall be submitted on the prescribed forms no later than thirty days following the close of the calendar year. If the annual conference sets an earlier deadline for receiving the reports, the earlier deadline shall apply.*
- *Para 6o6.8: Official records of secretaries, statisticians, and treasurers shall be kept according to the forms prepared by the General Council on Finance and Administration so that official statistical and financial items shall be handled alike in all annual conferences and that uniformity of reporting shall be established as a worldwide church policy.*

- Your church’s statistical report will be used to:

- Evaluate church vitality (Vital Congregations).
- Evaluate needs so that the conference can provide resources to aid congregation’s progress toward the congregation’s mission.
- Draw comparisons among congregations and among the different annual conferences.
- Compute the congregation’s new Mission Share/Appportionment.
- Provide critical information to the cabinet about congregations and pastors to make new appointments.

Stats: Why they are important?

- **Is it really that important??**
 - Accurate statistics provide both the local church and conferences a reliable window into the financial and congregational well-being of a congregation. While not the only piece, accurate reporting is a *vital* piece!
- **Best Practices for Stats Reporting...**
 - Recommended:
 - Good Planning and Recordkeeping
 - Care, Concern and Honesty
 - Double Checking your work
 - Having someone else review your work
 - NOT recommended:
 - “Fudging” 😞 & Wild Guesses 😞 😞
- **Explaining Major Year-to-Year Differences**
 - Explanations **Required** (Pre & Post Submission)
 - Financial Data/Reports may be Required

A Word about accuracy

- **Where is it located?**
 - <https://stats.gcfa.org/> (No “www”)
- **Where can I find more information?**
 - BWC: <https://www.bwcumc.org/stats>
 - Recording and additional training resources will be available on the conference sites no later than 1/12/2024.
- **Getting started**
 - Online Demonstration

ACStats – GCFA’s Stats Reporting Site

- **User Account Registration and Setup**

- Initial Login using the church's General Church number (GCNO) and a universal password: **Stats2023!** . You can look up your GCNO at <http://www.umdata.org/>
 - Usernames and Passwords are reset every year. All users need to register on the system, new or old.
 - The system allows multiple people to register under different roles for a church.
 - We strongly encourage you to limit the number of people entering data to avoid confusion and errors.
 - Registration includes required fields such as contact information and an optional address.
- Verify Church information!
 - Corrections to church information should be submitted through church's DA and will likely have a delay in populating to the ACStats Website.

ACStats – GCFA's Stats Reporting Site

- **How to use the system**

- ACStats provides last year's Statistical information in an accompanying column right next to where you input your current stats.
- You also have the option to print your stats right from the site and work on reporting away from the computer if you choose.
- As you enter information
- ACStats flags entries that differ drastically from the previous year.
- These alerts help identify significant changes or potential errors.
- Churches are prompted to provide brief notes for these changes/discrepancies.

ACStats – GCFA's Stats Reporting Site

NEW QUESTIONS FOR 2023

- **Table 1: Members received from closed United Methodist Churches**
 - Line 2g for BWC and PDC

- **Table 2: Breakout of Housing Expenses**
 - Parsonage Maintenance/Utilities, Rental Expenses, Housing Allowance have separate lines
 - BWC: Lines 55a1,2,3; 55b1,2,3
 - PDC: Lines 42a1,2,3; 42b1,2,3

NEW for 2023 Reporting

- **Local church membership**
 - Additions and reductions to the total professing members from end of last year to the end of this year
 - Membership Profile
 - By race
 - By gender
 - Profile totals add up correctly.
- **Participation: Activities and Attendance**
 - Average worship attendance
 - Sunday school attendance
 - Small groups for children, youth, young adults, other adults
 - United Women in Faith, United Methodist Men
 - Participants in missions and ministry programs

Table I

- **Assets, Debt, and Expenses**
 - Some of the expense lines are used in the Mission Share base calculations
- We do not apportion expenses associated with:
 - **Mission programs**, including community outreach.
 - Nursery school, preschools
 - Daycares, after school ministries
 - Soup kitchens, shelters, food pantries
 - Non-United Methodist groups like AA, Girl/Boy Scouts
 - **Capital expenditures** related to loan/mortgage payments, purchases, repairs, or short-term rental agreements.

Table II

*****ALL INFORMATION SHOULD MATCH THE PASTOR'S COMPENSATION FROM CHURCH CONFERENCE*****

- **Include...**
 - Base Salary
 - Other Cash Compensation paid by your church
 - Reimbursement of social security taxes
 - Reimbursement of family health premiums.
 - After tax personal contributions to UMPIP
 - Bonuses, gifts
 - Tax Deferred Compensation & Cafeteria Plan Contributions
 - **ALSO INCLUDE Equitable Compensation or other BWC Financial support/grants.**
- **Do NOT include:**
 - Compensation paid by other churches in your charge
 - Clergy related health/pension benefits

Table II: Compensation

- **Do NOT include Capital Campaign and/or Fundraising Expenses**
 - Report these on their appropriate lines under the 'Debt and Capital Payments' header
 - Purchased supplies
 - Rental of equipment or space.
 - Utility Expenses
- **DO include Stewardship Campaign Expenses**
 - Consultant costs
 - Mailings and special services

Table II: Program Expenses

- **Do NOT include In-Out Costs:**
 - Payments received by participants and subsequently paid out for church related programs or benevolence activities are not to be recorded as part of Table II.
 - Examples:
 - Church suppers and Mission / Fellowship trips.
- **Do NOT include expenses* for Mission, Outreach, Childcare**
 - *BWC – associated utility expenses may also be deducted from Operating Expenses using expense calculator (avail online).

Table II: Program Expenses

- **Mission Share base is calculated using the following Table II lines together for each local church:**
 - Pastor Compensation (Lead, Associate & Deacon)
 - Pastor Housing Allowance or Parsonage Expenses
 - **Do NOT include medical/pension costs for pastors in Comp or Housing amounts**
 - Salary & Benefits: All other church staff & Diaconal Ministers
 - Local church program expenses & operating expenses
 - **Do NOT include pastor or staff comp/benefits in your program or operating expenses !!**

Table II: Mission Share Base Details

- **This table collects data about the local church income**
- **Records income for annual budget by source**
 - Pledges
 - Non-pledge, but identified giver
 - Received from unidentified giver
 - Interest/Dividends
 - Sale of church assets
 - Building use fees, contributions, rentals
 - Fundraising and other sources
- **Capital income reported separately**
 - Capital campaigns
 - Memorials, endowments, bequests
 - Other projects (include UMW/UMM projects)
- **General Advances and other special giving**

Table III

**Thank You for Attending Our
Training. Have a great evening!**



Wrap up
