

UNDERSTANDING DATA TERMS (For Tables 1, 2, and 3) GENERAL COUNCIL ON FINANCE AND ADMINISTRATION THE UNITED METHODIST CHURCH

#	Name	What is this for?	Who uses it (beyond the local church)?
1	Total professing members reported at the close of last year	Used by local churches, annual conferences, and GCFA for internal data auditing purposes. Intended more as a baseline for use of local church in reporting membership for the current reporting year.	Annual Conferences GCFA
2a	Received this year on Profession of Faith other than confirmation		Annual Conference Boards and Agencies
2b	Received this year on Profession of Faith through confirmation	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. The "professions of faith" and "faith restored" lines are two of the most important indicators of the efficacy of local church outreach in making disciples of Jesus Christ for the transformation of the world.	District Superintendents & Bishops General Agencies Academic Researchers
2c	Restored by affirmation		
2d	Correct last year's total professing membership by addition	Increased use of online systems does not allow local churches to alter Line 1 as has commonly occurred in the past. As such, we anticipate an increased need for correction by addition and subtraction. By splitting corrections out from Line 2.b above, users of the data can better estimate the number or persons restored by affirmation from those corrections made to the previous year's membership.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
2e	Transferred in from other United Methodist churches	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. UM transfers are an important indicator of how churches are receiving persons, and the generalized level of denominational solidarity in various regions.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
2f	Transferred in from non- United Methodist churches	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. Transfers from non-UM churches does give some indication of our attractiveness to the churched of other Christian traditions.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
3a	Removed by Charge Conference action	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. The information helps account for "roll cleanings" in decline of some congregations.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
3b	Withdrawn from Professing Membership	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. If the withdrawn number peaks, it can help indicate a phase of conflict in a local church.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
3c	Correct last year's total professing membership by subtraction	Increased use of online systems does not allow local churches to alter Line 1 as has commonly occurred in the past. We anticipate that we will see an increased need for correction by addition and subtraction. By splitting corrections out from Line 5.b above, we can better estimate the number or withdrawn from membership from corrections made to the previous year's membership.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
3d	Transferred out to other United Methodist churches	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. UM transfers are an important indicator of how churches are losing persons, the generalized level of denominational solidarity in various regions, and patterns of migration and population movement.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
3e	Transferred out to non- United Methodist church	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. Transfers from non-UM churches are a useful indication of local congregation and denominational solidarity.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
3f	Removed by death	Used by DS's, Bishops, Conference and General Agency Staff, and Academic Researchers. This number been useful in estimating the relative age of members in congregations and conferences.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
4	Total professing members reported at the close of this year	One of the two most-referenced statistics (with attendance). Although membership is more static than attendance, it does not suffer from periods of non-reporting as the figure is carried over if no other data is reported.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
5a	Asian Professing Members	The Racial/Ethnic and Gender membership information is some of the most requested and used data in the local church statistics. Although it has	Annual Conference Boards and Agencies District Superintendents & Bishops
5b	Black Professing Members	and continues to be a source for some controversy, these lines provide researchers in and outside the denomination with critically important	General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
5c	Hispanic Professing Members	information for understanding the UMC's fruitfulness in reaching out to persons of a diverse range of socioeconomic backgrounds.	
5d	Native American Professing Members		
5e	Pacific Islander Professing Members		
5f	White Professing Members		
5g	Multi-Racial Professing Members		
6a	Female Professing Members		
6b	Male Professing Members		
7	Average attendance at all weekly worship services	Heavily-used data line that has seen its instructions subtly but substantively changed over time. Many conferences increasingly depend upon attendance as their most important evaluative metric.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
7a	Number of persons who worship online	As churches have adopted technology to broadcast via internet streaming, and a percentage of the faith based population increases in worshiping by live streaming, we may see a shift of more worship from in person attendance to online attendance. This is not intended to capture television or radio broadcasts. The number should only include verifiable visitors that can be counted who watch a live stream, including number in the party, not just a visit to the website.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
8a	Number of infants and children baptized this year (0-12)	Often used by conference leaders and denominational researchers, this data element has been reported denominationally for over a century. Splitting baptisms into children and adults allows for greater detail and understanding of how new people are joining our churches.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
8b	Number of adults baptized this year (Ages 13 or older)	Often used by conference leaders and denominational researchers, this data element has been reported denominationally for over a century. Splitting baptisms into children and adults allows for greater detail and understanding of how new people are joining our churches.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
9	Total Baptized Members who have not become Professing Members	This category has been a good indicatory of overall participation of children in local churches.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies & Academic Researchers
10	Number of other constituents of the church	A growing metric in the church. This category has come under increasing attention from leadership and researchers as a key component in estimating the total number of participants in the life of the local church.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
11a	Number of Children (0-11 yrs) in Christian groups and all other small groups (count only once)		
11b	Number of Youth (12-18 yrs) in Christian groups and all other small groups (count only once)	These questions were significantly revised in the 2009-2012 form to 1) improve the ease of reporting by local churches	Annual Conference Boards and Agencies
11c	Number of Young Adults (19-30 yrs) in Christian groups and all other small groups (count only once)	Christian formation activities including Church School, small groups, and	District Superintendents & Bishops General Agencies Academic Researchers
11d	Number of Other Adults (31+ yrs) in Christian groups and all other small groups (count only once)		

#	Name	What is this for?	Who uses it (beyond the local church)?
11	TOTAL number of persons in Christian groups and all other small groups		
12	Total enrolled in confirmation preparation classes this year	A long-standing measure used by denominational researchers to estimate youth presence in the church.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
13	Average weekly attendance (all ages) in Sunday Church School or other weekly education classes	One of the longest-reported statistics on Christian Formation. The data is useful in curriculum planning and the analysis of congregational ministries.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
14	Number of participants in Vacation Bible School	Helps churches more accurately and completely report the total impact the congregation has on the communities in which it serves.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
15	Number of ongoing Sunday Church School Classes offered		Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
16	Number of ongoing small groups , support groups, or classes offered (other than Sunday Church School)	Questions designed to be, 1) easier for churches to report, 2) a more accurate measure of the sorts of Christian formation ministries being offered by churches.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
17	Number of short-term classes, support groups, or small groups offered		Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
18a	Membership in United Methodist Men	Data is used by United Methodist Men in measuring activity and support levels, particularly at the local and AC levels. Alternative reporting methods	United Methodist Men leadership at the District, Conference, and Denominational

#	Name	What is this for?	Who uses it (beyond the local church)?
18b	Amount paid for projects (UMM)	that capture the activity of individual congregations do not currently exist.	level.
19a	Membership in United Methodist Women	Data is used by United Methodist Women in measuring activity and support levels, particularly at the local and AC levels. Alternative reporting	United Methodist Women at the District,
19b	Amount paid for local church and community work (UMW)	methods that capture the activity of individual congregations do not currently exist.	Conference, and Denominational level.
20a	Number of UMVIM teams sent from this local church	Mandated by the 2008 Discipline ¶247 .12 which states: "The charge conference shall receive reports annually on all local church organized Volunteer In Mission (UMVIM) teams, and the total number of local church	UMVIM at the District, Conference, and Denominational level.
20b	Number of church members participating in any UMVIM team	participants in any UMVIM team, and shall forward the combined report to the annual conference and the general church through the regular annual local church statistical report." Similar data is collected by UMVIM through a separate means via the annual conference UMVIM organizations.	District Superintendents & Bishops Connectional Table, GBGM, GCFA, UMPH, Other Agencies Academic Researchers
21	Total Number of community ministries for outreach, justice, and mercy offered by this local church	Lines $21-23$ are intended to gauge the local church's mission involvement and refer to the UMC's four areas of focus. These are not mutually exclusive and are not a total. If a ministry fits into more than one category, it shall be counted twice.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
21a	Number of global/regional health ministries		
21b	Number of ministries to the poor/socially marginalized		

#	Name	What is this for?	Who uses it (beyond the local church)?
22	Number of persons from your congregation engaged in missions.	Questions intended to give churches a means of reporting the total impact of the congregation upon the community, the region and the world. These questions give churches an opportunity to report about the lives they change, even if they do not attend our churches or participate in our Christian formation programs.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
23	Number of persons served by community ministries for outreach, justice, and mercy	Question intended to give churches a means of reporting the total impact of the congregation upon the community that surrounds it. This question gives churches an opportunity to report about the lives they change, even if they do not attend our churches or participate in our Christian formation programs.	Annual Conference Boards and Agencies District Superintendents & Bishops General Agencies Academic Researchers
24	Market value of church owned land, buildings, and equipment (church and parsonage values combined)	measures are valuable in some financial planning and asset management	District Building and Location Committees District Superintendents & Bishops GCFA and GBOPHB Academic Researchers
25	Market value of financial and other liquid assets		
26	Debt secured by church physical assets	A basic measure of the total level of debt held by the local church. These measures are valuable in some financial planning and asset management	District Building and Location Committees District Superintendents & Bishops
27	Other debt	research at the conference and denominational level.	GCFA and GBOPHB Academic Researchers
28a	Total amount APPORTIONED to the local church for all causes	causes through apportionments, mission shares, and other forms of assigned giving. Useful at all levels of the denomination in financial planning and promotion of connectional giving. Allows researchers the ability to better understand the full apportionment load being carried by	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops
28b	Total amount PAID by the local church for all apportioned causes to AC Treasurer		GCFA, GBOPHB, and other General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
29a	Total amount APPORTIONED by the local church for all apportioned causes directly paid to the DISTRICT	Basic financial information on giving by local churches to connectional causes through apportionments, mission shares, and other forms of assigned giving. Useful at all levels of the denomination in financial planning and promotion of connectional giving. Allows researchers the	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General
29b	Total amount PAID by the local church for apportioned causes directly paid to the DISTRICT	ability to better understand the full apportionment load being carried by local churches.	Agencies Academic Researchers
30	Total amount paid for General Advance Specials	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the denomination in financial planning and promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
31	Total amount paid for World Service Specials	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the denomination in financial planning and promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
32	Total amount paid for Annual Conference Advance Specials	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the denomination in financial planning and promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
33	Total amount paid for the Youth Service Fund	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the denomination in financial planning and promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
34	Total amount of all other funds sent to AC Treasurer for connectional mission and ministry	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the denomination in financial planning and promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
35	Total Annual Conference Special Sunday Offerings	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the denomination in financial planning and promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
36a	Human Relations Sunday (General Special Sundays)		Annual Conference CFA and other Boards
36b	One Great Hour of Sharing		
36c	Peace with Justice Sunday	Basic financial information on giving by local churches to connectional causes through more voluntary means. Useful at all levels of the	and Agencies District Superintendents & Bishops
36d	Native American Ministries Sunday	denomination in financial planning and promotion of connectional giving.	GCFA, GBOPHB, and other General Agencies Academic Researchers
36e	World Communion Sunday		
36f	U.M. Student Day		
37	Total amount given directly to United Methodist causes (not sent to AC Treasurer)	Basic financial information on giving by local churches to connectional causes through more voluntary means outside of the usual connectional structures. Useful at all levels of the denomination in financial planning and accountability, as well as the promotion of connectional giving.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
38	Total amount given to non-	Basic financial information on giving by local churches to charitable causes	Annual Conference CFA and other Boards

#	Name	What is this for?	Who uses it (beyond the local church)?
	United Methodist benevolent and charitable causes	through more voluntary means outside of the usual connectional structures. Useful at all levels of the denomination in financial planning and accountability, as well as the promotion of connectional giving.	and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
39	Total amount paid by the local church for all direct- billed clergy non-health benefits	Basic financial information on spending for clergy benefits for pastor(s). Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
40	Total amount paid by the local church for all direct- billed health benefits	Basic financial information on spending for clergy benefits for pastor(s). Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
41a	Total amount paid in base compensation to the pastor		Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
41b	Total amount paid in base compensation to all associate pastors and other pastoral staff assigned by the bishop	Basic financial information on spending for clergy benefits for pastor(s). Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
42a	Total amount paid to lead pastor for housing benefits		

#	Name	What is this for?	Who uses it (beyond the local church)?
42b	Total amount paid to associate pastor(s) and other pastoral staff assigned or appointed to the church for housing benefits		Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
43	Total amount paid to pastor and associate(s) for accountable reimbursements		Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
44	Total amount paid to pastor and associate(s) for any other cash allowances (non accountable)		Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
45	Total amount paid in salary and benefits for all other church staff and diaconal ministers	Basic financial information on spending and benefits for other lay staff. Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
46	Total amount spent for local church program expenses	Basic financial information on spending to support ministry in the local church. Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
47	Total amount spent for other local church operating expenses	Basic financial information on spending to support ministry in the local church. Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
48	Total amount paid for principal and interest on indebtedness, loans, mortgages, etc.	Basic financial information on spending to support ministry in the local church. Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
49	Total amount paid on capital expenditures for building, improvements, and major equipment purchases	Basic financial information on spending to support ministry in the local church. Useful at all levels of the denomination in financial planning and understanding major cost drivers for local churches.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
50	Total amount PAID by the local church on all expenditures	A useful tool in ensuring that the data reported for expenditures equals the total amount spent by the church.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
51	Number of giving units	This data, paired with other income information, can be useful in financial planning at the local church level. Household information can also provides useful information on family structures in the local church.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
52.a	Amount received through pledges	The basic income information reported on lines 57.a, 57.b, and 57.c, comprise the vast majority of income for most local churches. These lines are essential in better understanding the financial picture of local churches and will, as the quadrennium progresses, be the foundation for a number of resources for use by local churches in their financial planning.	Annual Conference CFA and other Boards
52.b	Amount received from non- pledging, but identified givers		and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies
52.c	Amount received from unidentified givers		Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
52.d	Amount received from Interest and Dividends	This line of basic income data can be especially useful in identifying churches where a significant amount of income is derived from endowments. This is useful by churches, districts, and conferences in financial planning.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
52.e	Amount received from Sale of Church Assets	This line of basic income data is useful for financial planning purposes, especially at the conference level. Churches that rely heavily on the sale of church assets for normal operating expenses may need special attention by District Superintendents or other leaders.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
52.f	Amount received through building use fees, contributions, and rentals	This line of basic income data can be especially useful in identifying churches where a significant amount of income is derived from use of the building. This is useful by churches, districts, and conferences in financial planning.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
52.g	Amount received through fundraisers and other sources	This line of basic income data can be especially useful in identifying churches where a significant amount of income is derived from individual contributions not given through the offering plate. This is useful by churches, districts, and conferences in financial planning.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
52	Total income for annual operating budget and benevolence giving	Total line for lines 52.a-g.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
53.a	Capital campaigns	Lines 53.a, 53.b, and 53.c report basic income data that can be especially	Annual Conference CFA and other Boards

#	Name	What is this for?	Who uses it (beyond the local church)?
53b	Memorials, endowments, and bequests	useful in developing a better understanding of how capital campaigns impact other giving in the church. This is used by churches, districts, and conferences in financial planning.	and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
53.c	Funds from other sources and projects, including sale of buildings		
53.d	Amount received for Special Sundays, General Advance Specials, World Service Specials, and other forms of directed benevolent (charitable) giving	This new line is designed to help churches know where to put designated giving, and Special Sundays in particular and decrease confusion in reporting.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
53	Total income for designated causes including capital campaign and other special projects	Total line for lines 53.a-d.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers

#	Name	What is this for?	Who uses it (beyond the local church)?
54.a	Equitable Compensation Funds received by Church or Pastor	Lines 54.a, 54.b, 54.c and the 54 totals line report basic income data that can be especially useful in developing a better understanding of how connectional funds and other institutional sources help support the local church. This is used by churches, districts, and conferences in financial planning.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers
54.b	Advance Special, apportioned, and connectional funds received by church		
54.c	Other grants and financial support from institutional sources		
54	Total income from connectional and other institutional sources outside the local church		
55	Total amount received by the local church	This is the total of all income total lines (52, 53 and 54). All income received, regardless of purpose, are comprised of the generous members and constituents of the church. This is used by churches, districts and annual conferences as one measure of many to evaluate the financial vitality of the church.	Annual Conference CFA and other Boards and Agencies District Superintendents & Bishops GCFA, GBOPHB, and other General Agencies Academic Researchers