Statistical Table Training
Year End - 2021

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Database Coordinator & Archivist

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Statistical Tables

The table data can be found at:

https://ezra.gcfa.org/

EZRA is the official data base of the United Methodist Church and is managed by Data Services of the General Conference of Finance and Administration (GCFA)
Why Complete the Tables?

The table statistical data is gathered by the general church and it is what the Conference uses to allocate the approved apportioned budget each year.

In other words…..

Table data is used to calculate your church apportionments!
How Are Church Apportionments Calculated?

Based on the table data churches submit in February:
• Average 3-year membership data represents 15%
• Average 3-year expense data (not capital) represents 85%

<table>
<thead>
<tr>
<th></th>
<th>Local church</th>
<th>Entire Conference</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021 average membership</td>
<td>350</td>
<td>59,223</td>
</tr>
<tr>
<td>2021 average expense</td>
<td>$225,000</td>
<td>$39,280,580</td>
</tr>
</tbody>
</table>

Membership Ratio = 350/59,223 = .005909
Expense Ratio = $225,000/$39,280,580 = .005728
Apportionment Decimal (.15*.005909)+(.85*.005728) = .005755
Apportionment Amount = $7,052,706 * .005755 = $40,588
Let’s Go Back to Ezra

This is the home page!

https://ezra.gcfa.org/
EZRA Log-In

User-Name: Your General Church Number with a small p or o after
The p stands for pastor
The o stands for other

Password: We have generally set the password to
MN2021

You may change your password once you are in the system under the tab account/change your password.

If you do not know your General Church Number contact Lisa at: Lisa.schultze@minnesotaumc.org or Heidi at: Heidi.Heller@minnesotaumc.org
EZRA Tables

For a hard copy of the tables go to:
https://www.minnesotaumc.org/tables

There are three tables to complete:

Table 1 – Membership and Participation

Table 2 – Church Assets and Expenses

Table 3 – Church Income
Table 1 – Membership and Participation

<table>
<thead>
<tr>
<th>CHURCH MEMBERSHIP</th>
<th>CHURCH MEMBERSHIP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Professing Members</strong></td>
<td><strong>Total Professing Members</strong></td>
</tr>
<tr>
<td>Reported this year on profession of Christian faith through confirmation</td>
<td>Reported this year on profession of Christian faith through confirmation</td>
</tr>
<tr>
<td>Discouraged this year on profession of Christian Faith other than through confirmation</td>
<td>Discouraged this year on profession of Christian Faith other than through confirmation</td>
</tr>
<tr>
<td>Recently added to new United Methodist Church</td>
<td>Recently added to new United Methodist Church</td>
</tr>
<tr>
<td>Transferred to other United Methodist churches</td>
<td>Transferred to other United Methodist churches</td>
</tr>
<tr>
<td>Removed from United Methodist Church</td>
<td>Removed from United Methodist Church</td>
</tr>
<tr>
<td>Transferred out to new United Methodist Church</td>
<td>Transferred out to new United Methodist Church</td>
</tr>
<tr>
<td>Died</td>
<td>Died</td>
</tr>
</tbody>
</table>

Please enter a number for all lines. If there is nothing to report on a line, please enter “0.”

**5a Asian/Africa, Southeast Asia, or Indian Subcontinent:** Includes, but is not limited to, Bangladesh, Bhutan, Cambodia, China, India, Indonesia, Japan, Korea, Laos, Malaysia, Myanmar, Pakistan, Philippines, Singapore, Sri Lanka, Taiwan, Thailand, Vietnam.

**5b African:** Members with ethnic origin in Africa or those who identify themselves as “African American.” This includes the African Diaspora in the Caribbean, Latin America, and North America.

**5c Hispanic/Latino:** Members with ethnic origin in Latin America (including Mexico), Central America, and the

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**GSPF Church No:**

**Employed ID No:**

**Pastor:**

**Church:**

**Charge:**

**District:**

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**Table 1: Membership & Participation**

Local Church Report to the Annual Conference - The United Methodist Church 2017-2020 Quinquennium – Revised 05/09/17

Tables are due in the conference office by February 17.

State: Minnesota

Census Reports for the year ended December 31, 

Church Type: Charter ___ Mission ___ New Church Start ___ Satellite ___ Parent Church ___
### Table 1 – Membership and Participation

- **Line 1** – Professing Members at the close of last year must equal last year ending professing members from last year line 4.

- **Lines 2a-2f** – Professing Members added this year through various ways.

- **Lines 3a-3f** – Professing Members removed this year through various ways.

- **Line 4** – Professing Members at the end of the year.

- **Line 5** – Represents Membership ethnicity and the total must equal line 4.

- **Line 6** – Represents Membership by gender and must equal line 4.
Table 1 – Membership and Participation

Line 7 – Average persons in weekly worship attendance. For 2021, use only the weeks you had in-person worship.

Line 7a – Number of persons who worship online. The important thing is counting metrics in a consistent way week to week. If you have been live streaming worship services for a while, continue counting online worship attendance the same way you have been. If you are just starting to use live streaming and are unsure about how to count online worship attendance metrics, here is what we would ask you to do:

• For Facebook Live: Use "1-Minute Video Views" as the number for metrics reporting
• For YouTube: Use "30-Second Video Views" for metrics reporting
• For Zoom: Count every attendee, even if they only join the Zoom call for part of the service. If you can tell that there is more than one person in a household watching, count each person.
• Pre-recorded videos: For any platform, if you are releasing pre-recorded worship service videos, you can wait 24 hours after publishing and use the number of views at that time as your metrics count.

We recommend waiting until at least a couple days after a video debuts to do the count.
Table 1 – Membership and Participation

Line 8 – Baptisms this year.

Line 9 – Those baptized who have not become professing members.

Line 10 - Number of constituents – those that are not a professing member, but pastor has pastoral care responsibility.

Lines 11-17 – Participation in Christian formation groups.

Lines 18-19 – Participation in men and women groups.

Lines 20-23 – Participation in mission engagement.
Table 2 – Church Assets & Expenses

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>2018 Value</th>
<th>2015 Value</th>
<th>Line #</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>Market value of church-owned land, buildings, vehicles and equipment</td>
<td>120,000</td>
<td>120,000</td>
<td>24</td>
</tr>
<tr>
<td>25</td>
<td>Market value of financial and other liquid assets</td>
<td>23,830</td>
<td>28,692</td>
<td>25</td>
</tr>
<tr>
<td>26</td>
<td>Debt secured by church physical assets</td>
<td>0</td>
<td>0</td>
<td>26</td>
</tr>
<tr>
<td>27</td>
<td>Other debt</td>
<td>0</td>
<td>0</td>
<td>27</td>
</tr>
<tr>
<td>28.a1</td>
<td>Apportioned amount for Developing Missional Leaders</td>
<td>621</td>
<td>574</td>
<td>28.a1</td>
</tr>
<tr>
<td>28.a2</td>
<td>Apportioned amount for Equipping Missional Congregations</td>
<td>303</td>
<td>506</td>
<td>28.a2</td>
</tr>
<tr>
<td>28.a3</td>
<td>Apportioned amount for Extending Missional Impact</td>
<td>1,037</td>
<td>1,195</td>
<td>28.a3</td>
</tr>
<tr>
<td>28.a4</td>
<td>Apportioned amount for Generating Missional Resources</td>
<td>130</td>
<td>182</td>
<td>28.a4</td>
</tr>
<tr>
<td>28.a5</td>
<td>Apportioned amount for Leadership of the Annual Conference</td>
<td>518</td>
<td>827</td>
<td>28.a5</td>
</tr>
<tr>
<td>28.a6</td>
<td>Apportioned amount for Support of the Annual Conference</td>
<td>709</td>
<td>847</td>
<td>28.a6</td>
</tr>
<tr>
<td>28.a7</td>
<td>Apportioned amount for uncollectible apportionments</td>
<td>337</td>
<td>472</td>
<td>28.a7</td>
</tr>
<tr>
<td>28.a</td>
<td>Amount APPORTIONED to the local church by the CONFERENCE</td>
<td>3,714</td>
<td>4,050</td>
<td>28.a</td>
</tr>
</tbody>
</table>

Notes:
- All church assets and debts should be listed below.
- Market value of church-owned land, buildings, vehicles and equipment includes the estimated market value of buildings, structures, vehicles, and equipment plus the value of property-related assets. If a property is in a trust for more than one church, let property-related assets only be on the report of the church whose ownership is located. If property is held by a charitable trust in common rather than an individual charity, a share of the value should be assigned to each church according to its percentage of total property holdings within the trust, except if a specific percentage of community real property has been otherwise designated. Congregations are not required to retain property agreements or to provide the amounts.
- Market value of financial and other liquid assets includes the estimated market value of cash, stocks, bonds, mutual funds, and other investments not included elsewhere. Include any liquid reserve funds in this line.
Line 24 – Market value of church owned land, buildings and equipment.

Line 25 – Market value of financial or other liquid assets.

Line 26 – Debt secured by church building.

Line 27 – Other debt. If the church received a loan from the Paycheck Protection Program (PPP) as part of the CARES Act that has not been forgiven, include the loan balance here.

Lines 28-38 - Apportionments and benevolent giving is completed by the conference. – The church is not apportioned on benevolences.
Table 2 – Church Assets & Expenses

Line 39 - Total paid for direct-billed clergy pension. This is only clergy not staff. This is pension only not health. Health is line 40.
DO NOT include any amounts deducted from clergy salaries and paid on their behalf.

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

Lines 41a thru 47 are the expenses used in apportionment calculation. These are the basic expenses for operating the church. DO NOT include capital improvements here! For multiple charge churches, include ONLY the expenses for THIS church.
Table 2 – Church Assets & Expenses

Line 41a – Base compensation paid to the lead pastor.

Line 41b – Base compensation paid to the associate pastor.

Line 41c – Base compensation paid to deacons.

Lines 41 d-f – Equitable compensation paid to lead pastor, associate pastor, deacons. Equitable compensation is approved by the cabinet to local churches not able to pay minimum compensation. Must agree to line 54a.

Lines 42 d-f – Housing allowance paid to lead pastor, associate pastor, deacons.
Table 2 – Church Assets & Expenses

Line 43 -44 – Accountable reimbursement plan and any cash allowances paid to lead pastor, associate pastor or deacons.

Line 45 – Amount paid to all other church staff.

Line 46 – Amount paid for all program expenses.

Lines 47 – Amount paid for all church operating expenses (insurance utilities, office expenses, etc. Do not include capital purchases or improvements.)
Table 2 – Church Assets & Expenses

Lines 48 and 49 are NOT included in the apportionment calculation.

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

Line 49 – Total amount paid on capital expenditures for building, improvements, and major equipment purchases.

Lines 50 – Total church expenses. Sum of Lines 29a through 49.
Table 3 – Church Income

<table>
<thead>
<tr>
<th>Number of Households Giving to the Local Church</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 Number of Pledges and Identified Gifts: The number of families or individuals recorded by name as contributions for the year in support of the annual budgeting plan and financial budget.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual Budget/Pending Plan Funding Sources (the funding for Lines 39 through all of Table 3 expenditures):</th>
</tr>
</thead>
<tbody>
<tr>
<td>These funds are used exclusively in support of the annual budgeting plan, and are not used for capital improvements or other purposes outside of the regular operating budget (except Line 36).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1</td>
<td>Number of Pledges and Identified Gifts: The number of families or individuals recorded by name as contributions for the year in support of the annual budgeting plan and financial budget.</td>
</tr>
<tr>
<td></td>
<td>Annual Budget/Pending Plan Funding Sources (the funding for Lines 39 through all of Table 3 expenditures): These funds are used exclusively in support of the annual budgeting plan, and are not used for capital improvements or other purposes outside of the regular operating budget (except Line 36).</td>
</tr>
<tr>
<td></td>
<td>Amount Received Through Pledge: This year’s receipts of pledges received toward the payment of pledges, collections of pledges, or other contributions specializing a level of giving toward the annual operating budget of the church (for example, a member’s payments toward an annual pledge). If you do not keep track of pledged amounts or do not have pledges, enter receipts on Line 52h.</td>
</tr>
<tr>
<td></td>
<td>Amount Received From Non-Pledging, Yet Identified Gifts: This year’s receipts from identifiable individuals who have not pledged or received an estimate of giving support of the annual operating budget (for example, personal checks from a member who did not submit a pledge card in response to the church’s stewardship campaign). If you do not keep track of pledged amounts or do not have pledges, enter receipts here.</td>
</tr>
<tr>
<td></td>
<td>Amount Received From Unidentified Gifts: This year’s receipts from unidentifiable individuals used in support of the annual operating budget (for example, loose currency or coins passed in the Sunday morning offering plate). If you do not keep track of this amount separately, include it on Line 53h.</td>
</tr>
<tr>
<td></td>
<td>Amount Received From Internet and Dividends and/or Transferred From Liquid Assets: Funds</td>
</tr>
</tbody>
</table>
## Table 3 – Church Income

Lines 51 – Report the number of households or giving units.

Line 52 – Operating income received from:

- **52a** – pledges
- **52b** – non-pledging identified donors
- **52c** – unidentified donors
- **52d** – interest/dividend earnings transferred from liquid assets
- **52e** – sale of church assets for budget
- **52f** – building use fee or rental
- **52g** – amount received from fundraisers or other sources
- **52t** – total income for annual budget spending
**Table 3 – Church Income**

Lines 53 – Received for Capital Campaigns and other designated special projects:

- 53a – capital campaigns
- 53b – memorials, endowments, bequests
- 53c – other projects including sale of buildings
- 53d – Amount received for Special Sundays, General Advance Specials, World Service Specials, Conference Advance Specials and other forms of directed benevolent (charitable) giving.
- 53t. Total income for designated causes including capital campaign and other special projects.
Table 3 – Church Income

Lines 54 – Income from connectional funds or other sources.
Line 54a - equitable compensation from conference to church or pastor agrees to line 41.
Line 54b – Advance Special, Apportioned, and Connectional Funds received by the church (grants from annual conference).
Line 54c – Other such as Foundation grants. Also, enter the amount received from the Paycheck Protection Program (PPP) as part of the CARES Act here (whether it's been forgiven or not).
Line 55 – Total Church Income.
Additional information requested – please include amounts even if reported elsewhere on Table I, II or III.

The Minnesota United Methodist Foundation requests this information to help them establish a benchmark for measuring the future success and effectiveness of its Planned Giving education, consultation, and resource program. This data will be used for informational purposes only.

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>Dollar Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Number and total dollar value of special gifts such as bequests, gifts from estates, trusts, or gift annuities received this year from members and friends of the church.</td>
<td>.xx</td>
<td></td>
</tr>
<tr>
<td>B. Number and total dollar value of Gifts of Stock received this year from members and friends of the church.</td>
<td>.xx</td>
<td></td>
</tr>
<tr>
<td>C. Number and total dollar value of other non-cash gifts (real estate, land, art, collections, etc.) received this year from members and friends of the church.</td>
<td>.xx</td>
<td></td>
</tr>
</tbody>
</table>

### Table 3 – Church Income