

**Please note:**

- **Online reporting:** 2011 Statistical Forms can be completed online—  
see the back cover of this booklet for more information
- Added for 2011—supplementary questions in Section 6  
on church-related cemeteries and accessibility of church buildings
- Please ensure that a copy of pages 9–12 of this booklet is made available  
to any treasurers who will be preparing Section 4 and 5 statistics

# 2011 Statistical and Information Forms

# INSTRUCTION BOOKLET



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## INTRODUCTION

This instruction booklet is designed to help you complete the 2011 Statistical and Information Forms, either on paper, or using the online option that was introduced two years ago.

These forms gather information that is essential to the administration of the United Church at all levels—the local congregation, presbytery, Conference, and General Council. It helps maintain current information on pastoral charges, congregations, and ministers; supports our mailing list database; and provides the statistics on which Conference and presbytery assessments are based.

Be assured that your information is important to the church whether you are a pastoral charge of 20 members or 1,000!

When completing the forms, please read each corresponding section of this instruction booklet carefully—it should make your work easier. There are revisions made to the booklet every year.

If you report online, the instructions for each question can be found in the help icon to the left of that question.

Individual sections may be delegated to those who can best supply the information. For example, church treasurers may fill out Sections 4 and 5, Property & Insurance and Financial Information.

To accommodate this, the instructions for Sections 4 and 5 have been designed as a pull-out in the centre of this booklet (pages 9-12), and the accompanying optional worksheets Forms A & B have been placed on separate pages. **If Sections 4 and 5 are given to your church treasurer to complete, please ensure that the treasurer also receives a copy of pages 9-12 of this Instruction Booklet.** If your charge is a multi-point charge, please ensure that each treasurer who will work on Sections 4 and 5 receives a copy of pages 9-12.

Individual sections of the instruction booklet can also be downloaded from the Statistics page of the United Church website ([www.united-church.ca/local/statistics](http://www.united-church.ca/local/statistics)).

At times, in order to clarify the charge's response to a question, it can be helpful to know who filled out the form. In Section 6 we ask for the names of respondents, a purely voluntary measure that helps us follow up with the appropriate person. You may also initial or sign your name at the bottoms of the sections you complete.

Please begin to gather the required information as soon as possible, in order to return the forms by the deadline (**Friday, March 2, 2012** for single-point charges; **Thursday, March 15, 2012** for multi-point charges). If you miss the deadline, the forms must still be returned to keep our files complete, but it may be too late to include your results in the annual *Year Book*.

For accurate results, *please enter a response to each question*. If you leave a question blank, we are forced to guess whether that blank means “zero” or “carry forward last year's value.”

Please aim for accuracy within reason! For example, on multi-point charges it can be difficult to calculate the financial sections. But remember, it is the general trends that are most important to the wider church, not the whereabouts of every penny.

If you are a church in shared ministry, refer to the instructions on page 14.

Should you need help with these forms in any way, please feel free to contact the Information and Statistics Coordinator (see contact information on the front cover).

Tom Broadhurst  
*Information and Statistics Coordinator*

# CONTENTS

	<i>Page</i>
<b>Getting Started</b> .....	4
<b>Section 1</b> (Pastoral Charge Identity & Membership) .....	5
Instructions for Section 1, Top	
Instructions for Questions 1 to 21	
<b>Sections 2 &amp; 3</b> (Ministry Personnel & Officers; Women's Groups) .....	7
Pastoral Charge Ministry Personnel as of December 31, 2011	
Selected Pastoral Charge Officers for 2012	
Presidents of UCW or Other Women's Groups	
<b>Section 4</b> (Property & Insurance Information) .....	9
Instructions for Questions 25 to 31	
<b>Section 5</b> (Financial Information).....	10
Instructions for Questions A.1 to A.6—Receipts	
Instructions for Questions B.1 to B.9—Expenses	
<b>Section 6</b> (Faith Development) .....	13
Instructions:	
Church (Sunday) School	
Membership in Groups	
Estimating the Number of Adherents	
Supplementary Questions for 2011	
<b>Shared Ministries (SM) Statistical Report</b> .....	14
<b>Worksheet—Form A</b> .....	15
<b>Worksheet—Form B (Receipts)</b> .....	17
<b>Worksheet—Form B (Expenses)</b> .....	18
<b>Additional Notes</b> .....	19
<b>Online Statistical Reporting</b> .....	20

## GETTING STARTED

### Who should complete the forms?

- The Official Board of the pastoral charge is responsible for seeing that the forms are completed.
- The minister of the charge must ensure that the completed forms are accurate and returned on time.
- We encourage delegation of specific forms to those who can best provide the details, for example, the pastoral charge secretary, treasurer(s), or Sunday School superintendent(s).

### Most significant changes for the 2011 forms packages:

- Online reporting option continues for 2011—please refer to the back cover (page 20) of this booklet
- Supplementary questions in Section 6 concerning church cemeteries and accessibility of church buildings

### How many forms are there?

- There are six sections on **five** blue forms (*Sections 2 & 3 share a form, and Section 6 is two-sided*).
- Please return the blue copy of each form, and retain a copy for your records. You can photocopy the completed form, or manually copy the information onto the second sheet provided.
- Form A & Form B, included at the back of this booklet, are **optional** rough worksheets to help you gather your information, and should not be returned.
- This packet also includes a pre-addressed return envelope and a summary of your charge's statistics for 2010.

### Will reading this instruction booklet help?

We hope so! We revise the booklet each year and incorporate many of your suggestions. Please ensure that the person responsible for each section of the forms is given the relevant instructions and reads them carefully. For example, the instructions for Sections 4 & 5 are designed as a pull-out that can be given to the church treasurer. If you have additional comments, suggestions, or corrections, forward them to us with your completed forms.

### When should the forms be returned?

- **Friday, March 2, 2012** (or earlier) for single-point pastoral charges
- **Thursday, March 15, 2012** (or earlier) for multi-point pastoral charges

In order for us to process 2,100 statistical forms, we must receive them by the deadline.

### How should the forms be returned?

If you are mailing the completed forms to us, please include the following in the return envelope:

- the blue copies of Sections 1, 2-3, 4, 5, and 6, in order
- a copy of your charge's printed annual report for 2011, if you have one

Keep the white copy of the forms (or a photocopy) and the worksheets (Forms A & B) for your files.

*(Submitting the 2011 Annual Report for your charge is particularly important to our work. If there is any question concerning the interpretation of the figures you have submitted, we will first consult your charge's Annual Report.)*

### Can I return the forms online (or by fax)?

- Yes! In 2009, we developed an online reporting option for the statistical forms, which will continue this year. The website for the 2011 forms should be ready after February 15, 2012. For more information, please refer to the back cover (page 20) of this booklet.
- It is possible to fax your forms to 416-231-3103, but we would *much prefer* to receive the originals by mail. We often have great difficulty correctly reading the faxed forms. If you send your forms by fax, please keep the originals on file—in case we need them.

### What if I have questions?

Should you need help with these forms in any way, please feel free to contact the Information and Statistics Coordinator (see contact information on the front cover). We are happy to talk with you.

The Year Book office has developed spreadsheets and additional support materials designed to assist those responsible for preparing Section 5. To obtain these materials, please contact the Year Book office (see contact information on the front cover).

## SECTION 1 Pastoral Charge Identity & Membership

This information is used by all courts of the church.

### INSTRUCTIONS FOR SECTION 1, TOP

The most recent information in our files is pre-printed for reference. Please check it carefully, and enter *changes only*.

**Official Charge Mailing Address:** Usually the address of the church itself, or if there is no office at the church, the minister's home. Please include the postal code.

**Church and Other Telephone Numbers:** "Church phone" is the church office telephone number. "Other phone" is another contact number for the pastoral charge, such as the minister's home phone number.

**Fax number:** If available, provide/update a fax number that may be used to contact the pastoral charge.

**E-mail:** We encourage every charge to provide/update an e-mail address that may be used to receive communications from the General Council Office.

**Website:** If available, the Web address (URL) for the pastoral charge. The Find a Church feature on the United Church website (<http://locator.united-church.ca>) now links to these.

**Alphabetical List of Preaching Places:** A "preaching place" is the geographic or community location of a local congregation. If a preaching place is also known by a name other than that of the community, please include the church name after the preaching place. For example, the listing for Knox United Church in Gull Lake, Saskatchewan, should read Gull Lake (Knox). If a preaching place has opened or closed, please give the exact date and a brief explanation.

**Year of Organization:** The earliest year of organization—or founding year of the congregation from which anniversaries are dated—for each congregation on the pastoral charge. Some preaching places will have a pre-printed date: please add or correct dates as needed.

**Shared Ministries:** "(SM)" beside the name of a pastoral charge indicates that national church records list it as part of an ecumenical shared ministry. If your pastoral charge is incorrectly identified (or should have been identified) as a shared ministry, please mark the correction. Consult the instructions for shared ministries on page 14.

### INSTRUCTIONS FOR QUESTIONS 1 TO 21

These questions ask about the number of people associated with your pastoral charge. The most recent information in our files is pre-printed for reference. Enter the information for 2011 in the boxes, one digit per box, with unused boxes to the left.

**Please enter a response for each question. If you leave a question completely blank, then we are forced to guess whether that blank means "zero" (0) or "carry forward last year's value."**

1. This number should match the number of congregations in the Alphabetical List of Preaching Places above. Do not count locations, such as nursing homes, where services may be conducted, but which are not recognized United Church congregations.
2. The number of organized Sunday or church schools on the charge.
3. The number of candidates for the Order of Ministry sponsored by your pastoral charge. Do not include candidates who are working in your charge but are sponsored by another pastoral charge. Also, do not include Inquirers.
5. A household means one unit of housing: one person living alone or a group of related or unrelated people living together in a contained housing unit. For example, a house, condominium, apartment, nursing home room\*, or hospital room\*. Please count *every* United Church *household*—member, adherent, nominal, whether they are active in a United Church congregation or only in times of need or for census purposes. This figure is intended to give all courts of the church a picture of the size of the constituency—both known and potential—with which they should be working. It should include all households reported in 18(b) below—thus, the number in Question 5 should be greater than, or equal to, the number in Question 18(b).

(\*In the case of nursing home and long-term hospital residents, each unrelated resident should be counted as a separate household for the purpose of this question.)

7. The service of adult baptism is concurrently a service of confirmation. Therefore, numbers included here should also be included in Question 12, below, as new adult members received into the church by Profession of Faith (Confirmation).
- 8, 9, & 10. Include all infant baptisms, marriages, and funerals conducted under the auspices of the pastoral charge in 2011, even if those involved do not have a regular church affiliation, or if the functions are performed outside the bounds of the pastoral charge.
11. **Please do not change the preprinted number.** This figure should be the 2010 year-end membership figure, as submitted by your charge, or as corrected after discussion between the charge and the Year Book office. If it is incorrect, print and then circle the correct number to the right, or adjust your answers to 13 or 15(b) so that the total in 16 is correct. (Our office *must* use this pre-printed number for our tabulations.)
- 12(a) & (b). Include adult baptisms recorded in 7 above.
13. Received “otherwise” refers to members received by Reaffirmation of Faith, or added due to changes in pastoral charge boundaries, membership roll revisions, or Session or Board action. Adjustments to correct previous inaccuracies in the membership count can also be entered here.
- 15(a) & (b). Removed “otherwise” refers to members removed due to changes in pastoral charge boundaries, membership roll revisions, or Session or Board action. Adjustments to correct previous inaccuracies in the membership count are also entered in here. Members added to the non-resident list of a charge in a given year are not to be removed as members of the church through 15(a) or (b) (see Question 17, below).
16. To calculate the pastoral charge’s total confirmed 2011 year-end membership:
- start with the pre-printed figure in 11 (2010 year-end total)
  - add the numbers in 12(a), 12(b), and 13 (members received during the year 2011)
  - subtract the numbers in 14, 15(a), and 15(b) (members removed during the year 2011)
- This figure should represent **all confirmed members whose names are on the church’s historic membership roll** and beside which there is no indication that the person’s name has been removed by death, transfer, or Board action. As long as members remain on the membership roll, they must be reported in Question 16. Non-resident members are also included in this figure (see Question 17, below).
- Note:* If your numbers in Questions 12–15 do not add correctly to the total reported in Question 16, the *Statistics Coordinator* will make adjustments to correct any small discrepancies. For large discrepancies, we will try to contact your charge.
17. Non-resident membership refers to the number of members still on the membership roll
- who have moved far enough away from the local church that they cannot attend regularly
  - but who have not formally transferred their membership to another congregation
  - and who have not been removed by Board action from your charge’s membership roll
- As long as non-resident members remain on the roll**, they must be reported here, *and* be included as part of the total membership figure reported in Question 16. (See *The Manual*, Bylaws 12-15, for more information.)
- Please remember that the count of **non-resident members** being removed from the membership roll must be included in Question 15(b)—otherwise, the membership total will not decrease to reflect these removals.
- 18(a). “Identifiable givers” includes all individuals **who gave a minimum of \$50 during the year to the congregation or pastoral charge** and who received a receipt for income tax purposes. This includes giving through Sunday offering envelopes and/or once per year in response to an annual canvass. “One-time givers,” people not normally involved in the congregation who give a special donation to the church (e.g., in memoriam, in appreciation for the use of the church for a wedding, etc.), are not classified as “identifiable givers.” As in the past, a married couple using one means of contributing is considered **one identifiable giver**.
- 18(b). The number of “financially supporting households is the number of households” in a pastoral charge in which there are **one or more identifiable givers** to local expenses. Normally, the figure in 18(b) should be lower than or equal to the number of households reported in 5 and the number of givers reported in 18(a).
19. “Identifiable givers” are defined in 18(a), above. If a charge gives a percentage of its total budget to the Mission and Service Fund, then every identifiable giver to local expenses should also be considered an identifiable giver to M&S.
21. Calculate average attendance as follows: During October and November (or for summer charges, June and July), count all people (adults and children) attending church in the sanctuary at the beginning of every service of worship. Add them up for a daily total. At the end of November (or July), add the totals for each Sunday in the two months and divide by the number of Sundays to obtain an average weekly attendance figure for the charge.

**SECTIONS 2 & 3 Ministry Personnel & Officers; Women's Groups**

Information for ministry personnel staff, the name and address of the Board Secretary (or equivalent), and selected names on file for six other pastoral charge officer positions are pre-printed on the form for reference.

**PASTORAL CHARGE MINISTRY PERSONNEL AS OF DECEMBER 31, 2011**

At the top of Section 2, we have printed the names of United Church ministry personnel shown in our records as serving in your charge at the beginning of December 2011.

If one or more of the ministers for your charge was a Lay Pastoral Minister, a Lay Pastoral Minister-in-Training, or a Staff Associate, please note that the United Church now considers these ministry personnel to be Designated Lay Ministers (DLM). This change came into effect in 2007.

Please revise the pre-printed information, referring to the descriptions below. If a person listed is no longer with the charge, cross out the name and indicate the end date. For additions to ministry personnel staff, write the new information on the blank lines below the printed names.

**Name:** Last name first, followed by the full name and initial(s). For example, "Doe, Mary B."

**Designation:** The ministerial designation abbreviations for pastoral charge staff are as follows.

*Members of the Order of Ministry  
(United Church of Canada)*

- OM    Ordained Minister
- DM    Diaconal Minister
- US    United Supply
- RS    Retired Supply
- IM    Interim Minister

*Designated Lay Ministry Personnel  
(United Church of Canada)*

- DLM   Designated Lay Minister  
*(includes recognized DLMs and DLM applicants)*

*Ordered Persons from Other Denominations  
Serving the United Church*

- OS    Ordained Supply
- DS    Diaconal Supply

*Candidates for Ministry  
(United Church of Canada)*

- CS    Candidate Supply
- SS    Student Supply
- MT    Minister-in-Training

**Year Ordained/Commissioned/Received:** This column indicates last two digits of the calendar year in which the staff person was ordained, commissioned, or received to the ministry of the church. A diaconal person ordained at a later date should retain the earlier *year of commissioning*; an ordained person commissioned at a later date should retain the earlier *year of ordination*.

**Year Covenanted:** This column indicates the last two digits of the calendar year in which the staff person began employment on the pastoral charge.

**Degree(s):** Check for completeness and accuracy, and indicate additions or changes as required.

**End Date, If Known:** If the incumbent is to leave the ministry of the pastoral charge and the end date of employment is known, please indicate that date here.

## SELECTED PASTORAL CHARGE OFFICERS FOR 2012

The name and address information for selected pastoral charge officers collected here will be kept on file for use in mailings from the General Council Office and for our historical record. Please note the following:

### 1. Board Secretary or Equivalent

For the Board Secretary position, the most recent information on computer file has been pre-printed for your reference. *Please enter changes only*, to the right. List the name and full mailing address (including postal code) of the secretary of your charge's Official Board or equivalent. (The Board Secretary's home address is not required if you wish to have official correspondence from the General Council Office directed to the charge's mailing address.)

This name will be listed along with those of the professional ministerial staff in the *Year Book, Volume II—Directory*. Official correspondence sent from time to time from the General Council Office to the charge will be addressed to the Board Secretary.

### 2.–7. Other Pastoral Charge Officer Positions

- The names of the other selected pastoral charge officers currently in our database are pre-printed on the form. (In rare cases, the database has retained two names for one position and it chooses one, which may not match the name submitted on your statistical form last year.)
- For each of the selected officer positions, if there is a change or correction to be made, please enter the new officer's name in the box provided. If there is likely to be any confusion about the person's name (for example, Frederick Thomas), please enter the last name, followed by a comma, followed by the first name.
- You may enter a home address, or simply allow mail to be directed to the pastoral charge address.
- If you do not have one of the listed positions, write "N/A" in the space provided for the person's name.

**Note to multi-point charges:** There is room on the form for only one officer in each position for each pastoral charge. Although we recognize that this can cause difficulty for multi-point charges that have individual officers for each preaching place, very few multi-point charges ask for separate mailings to the preaching places. (Sending mail to each congregation would add approximately 1,000 pieces to each Church House mailing.) For multi-point charges, please list one person as the *primary contact for the charge*, and ask the primary contact to inform or send copies to other contact people as needed. Thank you for your understanding.

### Mailings

Many charges already give the official charge mailing address for all committees. The church office or minister then distributes the information to the appropriate persons. **We have modified our mailing procedure** so that most mailings will now go to the official charge mailing address, using a position title such as "Church Organist or Music Director." We hope that this change will reduce the amount of mail to charges which goes astray. Mailings to Board Secretaries will still go to the address specified in Section 2 of the forms, unless mail is undeliverable to that address.

**Complete Addresses:** If you provide a charge officer's home address, please print, and give the person's complete name and address, **including postal code**. For example, use John S. Doe rather than J. Doe; use 44 Main St. rather than 44 Main; and include E3A 1C1. Without the correct postal code, mail cannot be delivered.

## SECTION 3—PRESIDENTS OF UCW OR OTHER WOMEN'S GROUPS

**UCW President(s):** List one president only for each congregation (not the presidents of individual units within a congregation). Space is provided to enter the congregation name.

**Presidents of Other Women's Groups:** If there are other women's groups operating on the charge, please provide the name and address of the president or contact person, the name of the group, and if applicable, the name of the congregation.

*(Please ensure that a copy of pages 9–12 is given to each treasurer who will work on the forms.)*

**SECTION 4 Property & Insurance Information**

For your reference, the most recent information on file has been pre-printed in the column titled “2010 Information.”

Insert all totals for this year in the boxes, even if the figures are the same as last year. Round numbers to the nearest dollar. One digit per box; blank boxes to the left. Please do not fill in unused boxes with zeros. For example, a response of \$1,500 should be shown as it appears to the right.

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**For accurate results, please enter a response to each question. If you leave a question completely blank, we are forced to guess whether that blank means “zero” or “carry forward last year’s value.”**

In Sections 1, 4, and 5 of the forms, working columns are provided on the right side of the page which can be used to enter the subtotals for each preaching place on the charge. Use of these working columns is optional.

**INSTRUCTIONS FOR QUESTIONS 25 TO 31**

- 25. In 25(a) & (b), “Replacement Value” refers to the cost to repair, replace, reconstruct, or purchase the specific item of property at current prices. All pastoral charges should review the replacement values of their properties regularly to ensure adequate insurance coverage.
- 25(a). The replacement value of church buildings proper, not other property that is physically separate from the church itself (for example, an auxiliary Sunday School hall, buildings and property of closed preaching places, income properties).
- 25(b). The replacement value of the manse(s) and any buildings not reported in 25(a).
- 25(c). Include the total value of property insurance coverage on all buildings that are owned by the pastoral charge and for which insurance is paid.
- 25(d). The property insurance premium. Do not include the premium for liability insurance if it is reported separately on your policy: instead, report it in 26(b) below.
- 25(e). Losses incurred *in the previous calendar year only* (2011).
- 26(a). Comprehensive general liability insurance is normally purchased in multiples of \$1,000,000. *Please enter the lowest limit purchased by any church on your pastoral charge.* For example, if one church on your charge has \$2,000,000 in liability insurance and the other has \$1,000,000, enter the \$1,000,000 figure. If any church on your pastoral charge does not purchase any liability insurance, please enter \$0 in the space provided. **Do not add together** the liability insurance amounts for each congregation.
- 26(b). Record your liability insurance premium here, if it is reported separately from the property insurance premium on your policy.
- 26(c). The value of third-party liability, bodily injury, or property damage losses (or incidents that might give rise to a claim) reported by your pastoral charge to your liability insurer during the previous year.
- 26(d). Report the total of the amounts paid out by your charge and, if known, paid by the insurer on behalf of the charge. The total should include amounts that cost less than your deductible, amounts not covered by your insurance and paid directly by the charge, and amounts handled directly by the insurer (if known).
- 27. In 27(a), (b), & (c), “real estate/resale market value” means the actual price a willing buyer would pay a willing seller in the current real estate market for the church land, other church properties, and all contents. The market value of church land can be difficult to determine; you may find it helpful to consult a realtor in your congregation or area, if this can be done without cost to your charge. Please note that these are estimated values only, and we do not expect charges to go to any expense to estimate these values. Please avoid double-counting any church property: each property value should be reported in only one of 27 (a), (b), or (c).

- 27(a).** The church property is reported in 27(c) below; the manse property is reported in 27(b). If the pastoral charge owns property on which there is neither a church nor a manse, report that property here. Usually, this means a vacant lot; in some cases, property not reported in 27(b) or (c) fits here. If the pastoral charge has no such property, please enter \$0. If you enter a new amount, please provide a short explanatory comment.
- 27(b).** Estimated real estate/resale market value of the manse (or other minister's residence) and contents, if owned by the charge.
- 27(c).** Real estate/resale market value of church land sites on the pastoral charge (excluding manse). The focus here is on the *church land value* only, excluding the value of any vacant lots or other properties reported above in 27(a), and excluding the estimated value of any church buildings. (Estimating resale value for church buildings is too speculative.) If you have church land sites, you should report some value (unless there is a specific circumstance that would prevent the possibility of resale).
- 28.** Savings belonging to the pastoral charge, its preaching places, and all organizations (including the UCW) that are of a long-term or permanent nature. This includes all trustee funds or endowment fund holdings. It does not include savings accounts associated with the general operating funds of the charge or any of its congregations, or cemetery endowment funds associated with your charge. **Do not include the value of church land or buildings.** (Note that the word "Assets" has been eliminated from this question to avoid confusion.) If your pastoral charge has transferred money to local capital investment holdings during the year, the transferred amount should result in an increase in the value reported under Question 28, relative to the prior year.
- 29.** The indebtedness figure includes amounts owing under United Church Capital Development and Capital Assistance Loans or to other financial organizations *external* to the pastoral charge. **Do not include amounts owed to the charge trustees or to other organizations within the pastoral charge.**  
(We are not concerned with debt internal to the pastoral charge; the word "Liabilities" has been eliminated from this question to avoid confusion.) If your charge has paid off its debt in the previous year, print "Delete."  
(Congratulations!)
- 30 & 31.** The Financial Stewardship Unit needs this information. The questions refer to money received from the estates of deceased persons, not to contributions made to the pastoral charge by living persons through donations in memory of the deceased. Please include bequests and any other kinds of estate gifts (annuities, insurance, charitable remainder trusts, etc.)
- 30.** Report the number of bequests and other estate gifts received in 2011. In general, if a bequest amount is reported under Question 31, then there should also be a value greater than zero for Question 30.
- 31.** Report the total dollar value of bequests and other estate gifts received in 2011. Amounts shown in Question 31 should generally also be included in Section 5, Question A.4 (Total Raised by Bequests Received, etc.). Some bequests are received over a period of two or more years. If the value reported under Question 31 represents the second or third year of a bequest, the bequest should not be counted under Question 30.

## SECTION 5 Financial Information

Please refer to these instructions to provide a reasonable picture of your pastoral charge's finances in 2011. Section 5 should not be viewed as a formal financial statement. An honest effort to be accurate without spending hours trying to account for every penny will be gratefully acknowledged.

In order to assist those who are preparing the figures for Section 5, we have printed on the form your charge's most recent values on file for Questions A.1-A.6 and B.1-B.9. These figures are printed to the left of the space provided for the 2011 figures.

In addition, a separate **summary page** of your charge's statistics from 2010 is provided in your statistical package. This summary includes the receipts and expenses from 2010, as reported by your charge, a comparison of total reported receipts and expenses, and a calculation of Year Book Column 40, the charge's 2010 operating expenses.

The *Year Book* office has developed spreadsheets and additional support materials designed to assist those responsible for preparing Section 5. If you wish to obtain these materials, please contact the *Year Book* office, using the contact information on the cover of this Instruction Booklet.

In your reporting, *please round figures* to the nearest dollar; thank you for not filling in blank boxes (to the left) with zeros. Detailed information for the preaching places columns is completely optional.

### How the *Year Book* office reviews Section 5 figures

When reporting receipts and expenses for 2011, please include amounts in funds other than the General or Operating Fund (e.g., Building Fund, Memorial Fund, CEC, Capital Fund, Manse Fund, Trustees). We want to get a reasonably accurate picture of the total income and total expenses of the charge and congregations for the year.

In checking your forms, we tally and compare the total reported receipts and total expenses. If available, we check back to your charge's annual report for 2011. If your charge, including congregations, had a small surplus (or deficit), this should be reflected when comparing the reported receipt and expense totals.

### Tip for Multi-Point Charges:

- Claim amounts *only once* under receipts where the money was *first raised*.
- Claim amounts *only once* under expenses where the money was *actually spent*.

In this way, receipts or expenses will not be recorded twice when there are internal transfers between groups or congregations, between funds, or between congregations and the pastoral charge treasurer.

**Optional Worksheets** (*for your files; use these worksheets only if you find them helpful; do not return with blue forms*)

**Form A, Church Organization Annual Report, p. 15:** To help you gather information for your charge's annual meeting(s) and assist you in completing Section 5. Please make as many copies as are needed for the organizations in your pastoral charge.

**Form B, Church Treasurer's Annual Report Form, pp. 17–18:** To help pastoral charge and local church treasurers gather information. Congregational treasurers helped design Form B to gather receipts and expenses that you will need to complete Section 5, and to allow entries unique to a particular charge. If you are using Form B, remember to include amounts raised and spent for all major funds on the charge, not only the operating account.

## INSTRUCTIONS FOR QUESTIONS A.1 TO A.6—RECEIPTS (see worksheet Form B, p. 17)

For accurate results, *please enter a response for each question. Do not "double count"—each receipt item should be reported in only one category from A.1 to A.6.*

**A.1.** Include all givings received through weekly envelopes, loose offerings, pre-authorized remittances (PAR), donations, etc., for the operation of the charge and its preaching places and all givings for the Mission and Service Fund. **This is not a total revenue field.** *Do not include* amounts reported in A.2 through A.6, below.

Charges receive amounts from individuals or groups that are often described as "flow-throughs" or "directed givings" for various charities and outreach projects. When such amounts are reported under B.1 and B.2 as being given by the church to charitable causes, equal amounts should be reported under A.1, A.2, or A.3 (as appropriate) to indicate that the money was raised. We suggest such amounts be included in A.3 if raised through fundraisers or church organizations, or else under A.1 if raised through congregational givings.

**A.2.** Include total amounts raised by the UCW(s) or other women's groups for all purposes. For example, local church support, M&S Fund, donations to other causes, operational, and other.

**A.3.** Include total amounts raised for all purposes by all other pastoral charge and preaching place organizations operating under the name of the church. Also include amounts raised by any other **fundraising** effort of the pastoral charge: special fundraising events, auctions, church suppers, barbecues, rummage sales, etc.

**A.4.** Include total amounts raised from bequests received; rental income; property sales; interest from all endowments, investments, and from long-term savings bank accounts; donations to memorial funds; and any government grants received, or grants received from any external source (excluding Mission Support Grants). Include income generated under the Board of Trustees, whether for the pastoral charge or for any endowment funds belonging to the pastoral charge (other than cemetery endowments). Estate bequests reported in Section 4, Question 31, should also be included here.

Charges have historically been allowed to include amounts transferred from the trustees or reserve fund to operating under Question A.4. Strictly speaking, these are not amounts raised in the reporting year, and the *Year Book* office has not been encouraging the inclusion of such amounts in A.4, as they can give a misleading picture of the financial health of the charge. If transfer amounts are included under the total reported for A.4, *please add a note on Section 5 indicating how much of the submitted A.4 figure is the transferred amount.* Please do continue to report amounts earned by, or donated to, the trustee accounts in the reporting year.

**A.5.** Include any givings made specifically for capital and/or building funds through weekly envelopes, pre-authorized remittances (PAR), donations, etc.

**A.6.** Include amounts borrowed in 2011 from sources external to the pastoral charge. Do not include existing debt, lines of credit, or amounts transferred from the charge trustees. Amounts reported under this question should also be reflected in corresponding increases to the value of Section 4, Question 29 (total charge indebtedness).

## INSTRUCTIONS FOR QUESTIONS B.1 TO B.9—EXPENSES (see worksheet Form B, p. 18)

**Note:** Do not include money remitted for the M&S Fund under any expense line. That information is on file from your charge's M&S records with the national Financial Services Unit, and it will automatically be included in the pastoral charge's statistical figures for 2011. This process ensures accurate reporting of the M&S figures.

In general, Questions B.1–B.2 and B.4–B.9 represent specific expenses. Expenses not covered by these questions should be included in B.3.

**Do not “double count”—each expense should be reported in only one category from B.1 to B.9.**

**B.1.** Include all contributions from the pastoral charge and any of its groups or organizations to any United Church appeals sponsored by General Council, Conference, or presbytery. For example, include appeals for theological colleges, church camps, Conference or retreat centres, and donations from your UCW directly to other United Church appeals or organizations. **Do not include presbytery and Conference assessments, or money forwarded to the M&S Fund.**

**B.2.** Include all contributions from the pastoral charge and any of its groups or organizations (including the UCW), to any non-United Church sponsored funds, charities, or causes (for example, hospitals, the Bible Society, food banks, welfare causes, refugee families, Christmas hampers, Out of the Cold, Foodgrains Bank, mission projects).

As noted on page 11 in the text box below A.1, “flow-through” or directed contributions should be reported consistently, being included under both receipts and expenses, or under neither. We encourage their inclusion in both places, since this gives a more accurate portrayal of the United Church contribution to local and international needs.

**B.3.** In almost all cases, **an amount should be reported here.** Pastoral charge operating costs include all expenses for the charge, its preaching places, and for all organizations, including the UCW. Include Conference and presbytery assessments, staff benefits (such as unemployment insurance, group insurance, CPP/QPP), study and book allowances, honorariums given, manse upkeep and expenses, and operating bank loan interest and charges. **Do not include** ministry personnel base salaries, travel expenses, and housing allowances; non-ministry personnel salaries; capital expenses or building loan interest. See worksheet Form B (page 18) under “Operational Costs of Church(es)” for more detail on what should be included under B.3.

**Tip for single-point charges:** A quick method to calculate your B.3 operational cost is to calculate the pastoral charge's total expenses from your charge's 2011 Annual Report, then subtract the amounts to be reported in B.1–B.2 and B.4–B.9 and the remittance to the M&S Fund. The remainder should be entered under B.3. (This method does not work so simply if your charge's financial statements capitalize the cost of any capital improvements on the balance sheet. Then the expense total does not reflect the cost of these improvements.)

**B.4.** Include base salaries paid for all *non-ministry personnel*, for example, church secretaries, custodians, organists, pianists, treasurers. (Ministry personnel salaries are recorded in B.5(a) and B.6(a), below.) Honorariums paid to non-ministry personnel should more properly be reported under B.3.

**B.5(a).** The base salary amount paid to one minister (ordained, diaconal, designated lay minister, or student), during the period January 1 to December 31. Where two or more ministers are on one pastoral charge, at the same time, enter the highest salary in B.5(a) and the other salaries in B.6(a). If two ministers served the charge at different times during the year (with no overlapping periods), enter the combined amount paid to both persons.

**Note:** If your charge made payments to a minister “on leave” during 2011, and was reimbursed through the Restorative Care Plan, please contact the *Year Book* office for advice on how to report these amounts.

**B.5(b).** The housing allowance for the minister whose base salary is reported in B.5(a). Please report actual amounts paid, not any “deemed value” (e.g., for a minister living in the manse).

**B.6(a).** Leave blank unless there was more than one minister simultaneously for at least part of the year. If there were two or more ministry personnel, include base salaries for all ministers not reported in B.5(a).

**B.6(b).** The housing allowance for the minister(s) whose base salaries are reported in B.6(a).

**B.7.** If ministry personnel are paid or reimbursed for travel expenses, please be sure to enter an amount here.

**B.8.** Include major improvements to church or manse, new equipment, or property purchases. The term “capital” implies enduring improvements lasting at least five years, for example, replacing a roof, making a major renovation or addition, painting the sanctuary, or purchasing a new sound system, a photocopier, etc. Any major change to property values as a result of capital improvements should also be reflected on Section 4, Questions 25 and 27(c).

**B.9.** Significant amounts paid out against loan principal, reported in this field, should also be reflected in a decrease in the value of charge indebtedness reported under Section 4, Question 29.

**Please note:** Column 40 of the *Year Book, Vol. 1* (Expended for the Operation of the Pastoral Charge, including Salaries) comprises the totals of B.3, B.4, B.5(a), B.6(a), & B.7—essentially, all expenses except housing allowance, M&S and other charitable contributions, and capital projects or major renovation costs.

<b>SECTION 6      Faith Development</b>
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In this section, information is collected concerning Church (Sunday) School total and average membership, and membership in groups. This will enable our office to provide an overview of Congregational Mission and Faith Development activity within the pastoral charge. Please enter totals for the **pastoral charge as a whole**. These numbers will be used to calculate the values for the 2012 *Year Book*.

Since pre-printed figures from 2010 do not appear on Section 6, a **summary page** of your charge's statistics from 2010 is provided in your package, including the School and Group figures reported for 2010.

Please enter the information for 2011 in the boxes provided, one digit per box, with blank (unused) boxes to the left. For accurate results, **please do not leave blanks**—*please enter a response for each question*.

## INSTRUCTIONS

### Church (Sunday) School

- If you reported one or more Church (Sunday) Schools in Section 1, Question 2, please be sure to provide details here.
- Answer 1 to 11 with numeric figures. Although Church (Sunday) School organization varies greatly from charge to charge and preaching places therein, please adapt your figures to fit the form's categories. If classes are combined over two categories, place your figures in the category where most children are enrolled, or pro-rate the figures.
- Please remember to provide your average attendance (actual or estimated) and to record the number of your teachers and officers (including all supply, occasional, substitute teachers and helpers) in Questions 5 & 10.
- Please note that the *total* figures reported in 1 to 5 should be greater than or equal to the *average* figures reported in 6 to 10, respectively.
- For 4 & 9, we are unable to accept counts in which the entire congregation is reported as an Adult Church (Sunday) School. This would create too great a distortion in the total figures being calculated.
- Remember also to include the number of children on your cradle roll in 11.

### Membership in Groups

- In this section, we are seeking simple numerical totals for membership in groups according to age ranges.
- Answer questions 12-16 and 18-21 with numeric figures. Please do not leave blank. For each question, include the total membership for all groups of that age range that functioned on your charge, either for the full year or for part of the year. A person who belonged to three groups should be counted three times. Please review all the groups within your charge to ensure that all groups are included. *Do not include* the counts for women's only or men's only groups in 16, as they are counted separately in 18-21.
- For 17, add together the numbers you have provided in 12 to 16.
- Remember to record your United Church Women or other women's group membership in 18 or 19. In your figure, include all UCW members, be they active, inactive, life, or associate members.

### Estimating the Number of Adherents

Traditionally, the United Church's membership figures include only those individuals who are confirmed members, reported in Section 1, Question 16 of these forms.

Using this calculation of membership figures excludes a significant number of people who are adherents rather than members of the United Church. In this question on adherents, we ask you to estimate the number of people who regularly participate in the life of your pastoral charge but who are not counted statistically as members of The United Church of Canada. (In consultation with staff in the Communities in Mission Unit, we suggest that attendance at one service per month is a minimal definition of "regular participation.")

*(For supplementary questions included in Section 6 on the 2011 Statistical Forms, please see the top of page 14.)*

## Supplementary Questions for 2011 in Section 6

Please be sure to answer the supplementary questions for 2011 on the back side of Section 6.

**Church Cemeteries:** The first group of questions attempts to identify which pastoral charges have, or are connected to, a cemetery. Collection of this information will allow the General Council Office to send out focused mailings with information relevant to these charges with cemeteries.

**Church Building Accessibility:** The second group of questions asks pastoral charges to indicate which of several specific assistive measures have been implemented in order to improve church building accessibility. This will help the United Church to identify accessible churches as part of a proposed expansion of our website church locator.

## SHARED MINISTRIES (SM) STATISTICAL REPORT

If a pastoral charge is identified on national church records as being part of an ecumenical shared ministry, "(SM)" will appear beside the name of the pastoral charge on the forms. If your pastoral charge has been incorrectly identified (or should have been identified) as a shared ministry, please mark the name correction at the top right corner of Section 1.

Each shared ministry is unique, so the guidelines below are quite general.

Please note that, if you find the "blue forms" unsuitable, you can instead complete the enclosed forms designed especially for shared ministry charges. The Annual Shared Ministry Statistical Forms were developed some years ago by staff in Alberta and Northwest Conference. With gratitude to the Conference, we offer them to shared ministry pastoral charges across the country. Please forward any suggestions as to how they might be further refined to the Information and Statistics Coordinator.

### INSTRUCTIONS FOR SHARED MINISTRIES COMPLETING THE "BLUE FORMS"

We hope that the following guidelines will be useful in completing the annual forms. These guidelines are general and in no way binding. If you are in a charge that has successfully worked out its own system of completing the forms, please continue as you have in the past.

Please read this instruction booklet carefully in order to find out what information is needed. Completing these forms is not meant to be an undue burden. Remember that general trends are more important to the wider church than the whereabouts of every penny.

**Section 1:** Some charges may be able to report exact United Church totals for all figures. Where United Church totals are not available, try to identify the percentage of the total confirmed membership of the charge which is United Church (for example, 40 members out of 100 is 40%). Use this percentage to determine the required figures. If the breakdown is unknown or not easily obtainable, insert the total figures for the pastoral charge regardless of denominational affiliation, but indicate that the figure you have entered is not a United Church total.

**Sections 2 & 3:** List pastoral charge staff members and officers regardless of denomination.

**Section 4:** Insert United Church totals for as many lines as possible if there are United Church owned property, assets, insurance coverage, or liabilities. Where actual United Church totals are not available, use the percentage calculated for Section 1 to determine the figures for all lines. If the church building and/or manse are totally owned by another denomination, please indicate this on the form, beside the appropriate questions.

**Section 5:** As in Section 4, insert exact United Church totals if they are known; otherwise, calculate figures on a percentage basis.

**Section 6:** In general, if the Church Sunday school and the groups are inter-denominational, please enter the total figures. The one exception to this rule would be with respect to the membership in women's groups. If possible, please report the United Church membership in women's groups for Questions 18 and 19.

You do not have to return this form—it is meant only as an optional aid for your calculations

**WORKSHEET—FORM A**

**Year Reported 2011**

**CHURCH ORGANIZATION ANNUAL REPORT**

(E.g., UCW, Sunday Schools, Men’s Groups, etc. Reproduce as many copies as necessary)

**NAME OF ORGANIZATION** \_\_\_\_\_

**CHURCH OR CHARGE** \_\_\_\_\_

**MEMBERSHIP INFORMATION**

Names of Teachers or Leaders \_\_\_\_\_

**OFFICERS:**

President: \_\_\_\_\_  
 Vice-President: \_\_\_\_\_  
 Vice-President: \_\_\_\_\_  
 Secretary: \_\_\_\_\_  
 Treasurer: \_\_\_\_\_  
 Other: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**MEMBERSHIP STATISTICS:**

Number of Members at Beginning of Year..... \_\_\_\_\_  
 New Members Joining During Year(+)..... (+) \_\_\_\_\_  
 Members Leaving During Year ..... (-) \_\_\_\_\_  
 Number of Members at End of Year ..... (=) \_\_\_\_\_  
 Sex of Members: Female \_\_\_\_\_ Male \_\_\_\_\_  
 Age Range of Members \_\_\_\_\_ To \_\_\_\_\_  
 Number of Meetings During Year..... \_\_\_\_\_  
 Average Attendance at Meetings ..... \_\_\_\_\_

**RESUME OF ORGANIZATION’S ACTIVITIES DURING YEAR REPORTED**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**ORGANIZATION’S FINANCIAL REPORT FOR 2011 (SUMMARIZED):**

**RECEIPTS FOR YEAR**

Balance at Beginning of Year .... \$ .  
 Membership Fees ..... .  
 .  
 .  
 .  
 .  
 .  
 .  
 .  
 Donations from Others..... .  
**TOTAL** \$

**EXPENSES FOR YEAR**

Contributions to M&S Fund .....\$ .  
 Contributions for Local Church Support ..... .  
 Other Donations—United Church..... .  
 Other Donations—Non-United Church..... .  
 Organization’s Operating Expenses..... .  
 Other Expenses ..... .  
 Balance at End of Year..... .  
**TOTAL** \$

These amounts should be included in Section 5 where appropriate under  
 Receipts: Questions A.2 (UCW) & A.3  
 Expenses: Questions B.1, B.2, B.3, B.9 of the pastoral charge

(Please do not include opening bank balances at Jan. 1, 2011, under reported “receipts” in the year 2011.)



You do not have to return this form—it is meant only as an optional aid for your calculations

WORKSHEET—FORM B

Year Reported 2011

CHURCH TREASURER'S ANNUAL REPORT

NAME OF CHURCH OR PASTORAL CHARGE \_\_\_\_\_

SECTION 1—IDENTIFIABLE GIVERS 2011

(Enter amounts here on specified lines of Section 1, Statistical Forms)

Number of Identifiable Givers (\$50 or more ) to Local Expenses ..... 18(a)
Number of Households Represented in Above [number should be less than or equal to 18(a)] ..... 18(b)
Number of Identifiable Givers to the M&S Fund..... 19

SECTION 5—RECEIPTS 2011

(Enter amounts below on specified lines of Section 5, Statistical Forms)

When reporting receipts and expenses for 2011, please include amounts in all major funds (e.g., Building Fund, Memorial Fund, CEC, Capital Fund, Manse Fund, Trustees). We want to get a reasonably accurate picture of the total income and total expenses of the charge and congregations for the year.

Allocations from congregation treasurers to the Central Treasurer should not be reported under any category of Receipts—presumably, the money being allocated to the charge has already been counted when it was first received by the congregation from individual donors.

Total Givings for Operation of the Pastoral Charge, Its Preaching Places and for the Mission and Service Fund:

Envelopes (Local) .....\$ \_\_\_\_\_
Envelopes (M&S)..... \_\_\_\_\_
PAR, Other Income ..... \_\_\_\_\_
Loose Offerings ..... \_\_\_\_\_
SUB-TOTAL .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ A.1

Total Amount Raised by UCW for All Purposes. For Example:

Local Church Support.....\$ \_\_\_\_\_
M&S Fund..... \_\_\_\_\_
Donations to Other Causes ..... \_\_\_\_\_
Operational/Other ..... \_\_\_\_\_
SUB-TOTAL .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ A.2

Total Amount Raised by Other Organizations. For Example:

Local Church Support.....\$ \_\_\_\_\_
M&S Fund..... \_\_\_\_\_
Donations to Other Causes ..... \_\_\_\_\_
Operational/Other ..... \_\_\_\_\_
Amounts from Fundraising Events..... \_\_\_\_\_
SUB-TOTAL .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ A.3

(Also include amounts raised by any other fundraising effort of the pastoral charge in A.3—see instructions, p. 11)

Total Raised from:

Bequests Received.....\$ \_\_\_\_\_
Rental Income, use of property..... \_\_\_\_\_
Property Sales ..... \_\_\_\_\_
Interest from Endowments/Investments.... \_\_\_\_\_
Donations to Memorial Funds..... \_\_\_\_\_
Government (or Other) Grants..... \_\_\_\_\_ (Do NOT include Mission Support Grants)
Other ..... \_\_\_\_\_
SUB-TOTAL .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ A.4

Congregational Givings for Local

Capital or Building Funds.....\$ \_\_\_\_\_
SUB-TOTAL .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ A.5

Amount of Loans Received (excluding Mission Support Grants)

Loans During Year.....\$ \_\_\_\_\_
SUB-TOTAL .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ A.6

.....OVER/ ↗

SECTION 5—EXPENSES 2011

(Enter amounts below on specified lines of Section 5, Statistical Forms)

Paid out for all other United Church appeals (Please include UCW donations to United Church appeals/groups) (Do not include donations to M&S Fund):

.....\$ \_\_\_\_\_
SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.1

Paid out for all other charitable purposes (ecumenical groups, hospitals, Bible society, benevolent fund, mission projects, etc.): (again, include UCW donations to other charitable purposes; please do not include donations to the M&S Fund). Also include here amounts expended for local community assistance programs (food bank, Out of the Cold, etc.)

.....\$ \_\_\_\_\_
SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.2

Operational Costs of Church(es):

- Conference/Presbytery Assessments.....\$ \_\_\_\_\_
Office Operation, telephone..... \_\_\_\_\_
Maintenance and Repairs..... \_\_\_\_\_
Heat/Light/Water..... \_\_\_\_\_
Manse expenses ..... \_\_\_\_\_
United Church Observer..... \_\_\_\_\_
Taxes ..... \_\_\_\_\_
Insurance..... \_\_\_\_\_
C/Q-PP, UIC, Pension Plan Contributions ..... \_\_\_\_\_
Honorariums Given..... \_\_\_\_\_
Study & Book Allowances..... \_\_\_\_\_
Other ..... \_\_\_\_\_

(For a quick method to calculate a reasonably accurate value for B.3, applicable to single-point charges, please consult the tip under the explanation for Question B.3, on page 12 of this booklet.; this tip does not work if your charge capitalizes the cost of any capital improvements on the balance sheet.)

Operational Costs of Organizations ..... (including UCW expenses)
SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.3

Non-Ministry Personnel Salaries:

- Secretary .....\$ \_\_\_\_\_
Custodial..... \_\_\_\_\_
Organist/Pianist ..... \_\_\_\_\_
Other Staff ..... \_\_\_\_\_

SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.4

Salary Paid to (One) Minister or Supply..... \$ \_\_\_\_\_ B.5(a)
Amount of Housing Allowance Paid to Him/Her..... \$ \_\_\_\_\_ B.5(b)
Salary Paid to Other Professional Ministerial Staff ..... \$ \_\_\_\_\_ B.6(a)
Amount of Housing Allowance Paid to Him/Her/Them..... \$ \_\_\_\_\_ B.6(b)

Travel Expenses Paid to All Ministerial Staff:

.....\$ \_\_\_\_\_
..... \_\_\_\_\_
..... \_\_\_\_\_

SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.7

Paid Out For:

- Local Capital Improvements .....\$ \_\_\_\_\_
Purchase of Property..... \_\_\_\_\_

SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.8

Paid Out against Loan Principal and Interest

- Payment of Loan Principal and Interest \$ \_\_\_\_\_
Other Charges..... \_\_\_\_\_

SUB-TOTAL.....\$ \_\_\_\_\_ \$ \_\_\_\_\_ B.9

Please note: Column 40 of the Year Book, Vol. 1 (Expended for the Operation of the Pastoral Charge, including All Salaries) comprises the totals of Section 5, Questions B.3, B.4, B.5(a), B.6(a), & B.7

## ADDITIONAL NOTES

### Other Documentation to Include with Your 2011 Statistical Forms

Could you also provide our Year Book office with the following:

- A copy of your pastoral charge's printed *2011 Annual Report(s)*. These reports help clarify questions that arise with your forms. We then forward all report(s) to the Conference archives. If you have an electronic version of your Annual Report, you may e-mail the report to us.
- A copy of your pastoral charge's *newsletter*. Please put the Information and Statistics Coordinator on your charge's newsletter mailing list. We circulate newsletters among Church House staff, who read them for program and story ideas, and then forward them to the appropriate Conference archives.
- Any *printed information* relating to your pastoral charge, its preaching places, or its staff. We gather newspaper clippings, articles, and congregational histories for the Conference archives.

### For Churches with Questions about the Membership Roll

Visit [www.united-church.ca/local/statistics](http://www.united-church.ca/local/statistics) to download the following helpful article:

- For practical information on membership rolls, please refer to "How to Maintain and Use Your Church's Membership Rolls" (Douglas Flanders, *Exchange*, Winter 1992)

Also for questions concerning the membership roll, the Year Book office has available, for e-mail distribution, a PDF copy of "Frequently Asked Questions Concerning Recordkeeping," pages 10–16 of the 2005 document, *Archives and Recordkeeping: A How-To Guide for Congregations and Conferences*, prepared by the Committee on Archives and History.

### 2011 Statistics Forms and Instructions Available on the United Church Website

Beginning Friday, January 20, 2012, the following documents will be available at [www.united-church.ca/local/statistics](http://www.united-church.ca/local/statistics):

- this instruction book, complete or in sections, including the accompanying worksheets Forms A & B
- an overview of some practical aspects of completing and returning your statistics
- generic copies of each page of the 2011 Statistical Forms (without the pre-printed information specific to your pastoral charge) as PDFs (Portable Document Format)

We also draw your attention to the Find a Church or Minister feature at <http://locator.united-church.ca>.

## Try the Online Reporting Option!



For the 2009 Forms, we introduced online statistics reporting. That option will continue this year. After February 15, 2012, you can log on to a website and submit your annual statistics and information updates electronically.

Last year, 650 pastoral charges submitted their 2010 stats online (up from 330 for 2009), and most of the comments we received were positive. Others suggested improvements, many of which have been implemented.

We encourage you to try out online reporting for your 2011 forms.

*"Excellent that we are able to process this online now! Very user friendly!  
Thank you! Quick, efficient and savings of valuable office resources,  
paper, postage, etc."*

*"Form easy once software was downloaded."*

*"Great idea going online... Form was easy to follow and input!  
Glad we are using technology in our church to capture the snapshot of  
who we are at this time and place!"*

### How to Submit Your Stats Online (after February 15, 2012)

You'll need

- a computer with the Internet Explorer browser
- an ID number (your charge's M&S number) and an Access Code – these two numbers are at the top of the cover letter in your 2011 statistical forms package

Please go to <https://webapps.united-church.ca> for detailed instructions on

- how to download software (from Apeon) that you'll need to complete your forms online
- after downloading this software, how to access the site to file your statistics

Both new and returning users will need to download the software the first time they use the system each year.

The United Church website also has an FAQ page and contact numbers to call for support. If you encounter any technical problems, please call our programmer, Jason Ding (1-800-268-3781 ext. 3033).

As much as possible, the online forms resemble the printed forms—the pages and questions match very closely. Each statistics screen includes your charge's 2010 statistics, side by side with the 2011 questions.

There are 8 screens for you to update. You can enter and exit these screens, and the application as a whole, as many times as you need. You can save your work and it will be retained when you return.

On each screen, and beside most questions, there are help icons to direct you through the process. The text of this instruction booklet for each question is included in these help icons.

When you have completed the 8 screens, you will be prompted to Submit Your Forms to our office, and you will have the option to print your completed forms or save them as a PDF file.

If you do submit your forms online, we invite you to e-mail us a copy of your 2011 Annual Report.

**We hope as many charges as possible will use this online option. Good luck!!**