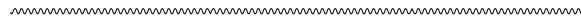

Please note:

- **ATTENTION:** The IWA/WebApps platform was retired as of December 31, 2020. As of January 1, 2021, please log into ChurchHub.ca to submit your statistics using your Community of Faith login. Each page of the statistics is under a separate tab header.
 - Thank you Mac users for your patience as we've rebuilt the statistical and assessment forms on ChurchHub. The ChurchHub site is multi-device, multi-platform. Tablets, iPads, laptops, desktop are all acceptable devices. Would not try it on a cell phone though.
 - Each question must now be answered even if the answer is 0 to allow the platform to submit your statistics.
 - To update your *current minister's address, phone, and e-mail*, please have them update this by visiting ChurchHub.ca and logging in with their personal email
 - In ChurchHub we have developed a tile entitled "Officers and Roles". In this section, we are now displaying the current pastoral charge officer's names and e-mails. Please update as necessary and provide unique, personal e-mail addresses for pastoral charge officers (*for future invitations to ChurchHub and important updates*). This information can now be updated anytime!
 - Only one copy of the forms is provided; if you submit paper, please *keep a copy* for your records.
 - This 2020 Instruction Booklet and worksheets will also be e-mailed directly to each charge treasurer for whom we have an e-mail address.
-

2020 Statistical and Information Forms

Instruction Booklet



Statistics Office

The United Church of Canada
3250 Bloor St. West, Suite 200
Toronto, Ontario M8X 2Y4

Toll-free:	1-800-268-3781 ext. 2031
Telephone:	416-231-5931 ext. 2031
Voice mail:	416-231-7680 ext. 2031
Fax:	416-231-3103 (attn: Statistics)
E-mail:	statistics@united-church.ca
Online reporting:	ChurchHub.ca

Introduction

This Instruction Booklet is designed to help you complete the 2020 Statistical and Information Forms using the online option, our preferred method of receiving your information, or on paper.

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

Be assured that your information is important to the church whether you are a pastoral charge of 10 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.

When reporting 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 Property & Insurance and Financial Information.

If the Property & Insurance and Financial Information are given to your church treasurer to complete, please ensure that the treasurer also receives a copy of pages 10–15 of this booklet. If your charge is a multi-point charge, please ensure that **each** treasurer who will work on those sections receives a copy of these pages. To help the relevant instructions get into the treasurer's hands, we're also e-mailing a copy of the Instruction Booklet to each pastoral charge treasurer for whom we have a valid e-mail address.

At times, in order to clarify the charge's response to a question, it can be helpful to know who filled out particular sections of the form. In the last section, we ask for the names and telephone numbers of respondents, a purely voluntary measure that helps us follow up with the appropriate person. We also appreciate any notes or comments explaining changes to your values.

Please begin to gather the required information as soon as possible, in order to return the forms by the deadline (**Monday, March 8, 2021**, for single-point charges; **Monday, March 22, 2021**, 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.* For our online entry system, *you must enter a response to each question even if the value is \$0* as you will not be able to submit your questionnaire if a field is left blank. If you leave a question blank (paper forms), 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 17.

Should you need help with these forms in any way, please feel free to contact the statistics office (see front cover).

Contents

Getting Started	4
Pastoral Charge Identity & Membership	5
Instructions for Section 1, Top	
Instructions for Questions 1 to 22	
Ministry Personnel & Officers	8
Pastoral Charge Ministry Personnel as of December 31, 2020	
Selected Pastoral Charge Officers for 2021	
Property & Insurance Information	10
Instructions for Questions 25 to 29	
Financial Information	12
Instructions for Questions A.1 to A.6—Receipts	
Instructions for Questions B.1 to B.9—Expenses	
National Assessment Calculation	
Faith Development	16
Instructions:	
Church (Sunday) School	
Membership in Groups	
Presidents of UCW or Other Women’s Groups	
Shared Ministries (SM) Statistical Report	17
Additional Notes	18
Worksheet—Form A (Church Organization Annual Report)	19
Online Reporting Option	20

Getting Started

Who should complete the forms?

- The Official Board or equivalent 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, as noted on the front cover:

- To facilitate our editing work, all questions must be answered, even if the value is 0, to allow the platform to submit your statistics.
- Only one copy of the forms is mailed; if you submit paper forms, please keep a copy for your records.
- When the Statistics Office contacts you questions are asked in a X.X format where the first number is the Section of the Statistics and the second is the question (i.e., Property.28 means Property tab, question 28).

How many forms are there?

- There are **five sections** on the blue forms.
- Please return each form and retain a copy for your records.
- Form A, at the back of this booklet, is an optional worksheet to help you gather information. Do not return it.
- This packet also includes a pre-addressed return envelope and a summary of your charge's statistics for 2019.

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, please ensure the instructions for Property & Insurance and Financial Information are 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?

- **Monday, March 9, 2020** (or earlier) for single-point pastoral charges
- **Monday, March 23, 2020** (or earlier) for multi-point pastoral charges

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, 4, 5, and 6, in order
- a copy of your charge's printed annual report for 2020, if you have one
(*Submitting your annual report 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.*)

Keep a copy of the forms (and, if you used it, the worksheet—Form A) for your files.

Can I return the forms online?

- Yes! Since the 2009 forms, online reporting has been an option. ChurchHub will be ready to accept your submissions for the 2020 online forms by early January 2021. For more information, see the back cover (page 20) of this booklet.
- We would *much prefer* to receive the originals by mail or online. We often have great difficulty correctly reading faxed forms.

What if I have questions?

Should you need help with these forms in any way, please feel free to contact the Statistics office (see front cover). We are happy to talk with you. We have developed spreadsheets and additional support materials designed to assist those responsible for preparing Section 5. To obtain these materials, please Visit the statistics page on www.united-church.ca.

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. Please visit ChurchHub to update your information.

Website: If available, the Web address (URL) for the pastoral charge. The *Find a Location* feature on the United Church website and various Regional Council websites link here.

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 17.

Instructions for Questions 1 to 22

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 2020 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, 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 2020, 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 pre-printed number.** This figure should be the 2019 year-end membership figure, as submitted by your charge, or as corrected after discussion between the charge and the Statistics office. If it is incorrect, print and then circle the correct number to the right, or adjust your answers in 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 2020 year-end membership:

- start with the pre-printed figure in 11 (2019 year-end total)
- add the numbers in 12(a), 12(b), and 13 (members received during the year 2020)
- subtract the numbers in 14, 15(a), and 15(b) (members removed during the year 2020)

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. 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 Mission & Service, then every identifiable giver to local expenses should also be considered an identifiable giver to Mission & Service.

21. In this unprecedented time, 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 and on-line at the beginning of every service of worship. We are aware that while the on-line count might be inflated by people coming into and out of a stream/broadcast, there doesn't appear to be any way to take that into account. 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.

22. Traditionally, the United Church's membership figures include only those individuals who are confirmed members, reported in Question 16 above. 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 colleagues working on support to congregations, we suggest that attendance at one service per month is a minimal definition of "regular participation.")

Ministry Personnel & Officers

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, 2020

At the top of this section, we have printed the names of United Church ministry personnel shown in our records as serving in your charge at the end of December 2020.

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

*Candidates for Ministry
(United Church of Canada)*

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

*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

RA In Readmission process

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.

Hours: This column indicates the number of hours the staff person is employed by the pastoral charge.

Primary Address: Check for completeness and accuracy. Changes may be made by visiting [ChurchHub.ca](https://www.churchhub.ca). If you require a login ID, please e-mail ministry@united-church.ca.

Selected Pastoral Charge Officers for 2021

The name (and appropriate contact information) for selected pastoral charge officers collected here will be kept on file for use in mail and e-mail communications from the General Council Office, and for our historical record.

In recent years, the General Council Office has been shifting many of our communications to pastoral charges away from large-scale mailings and toward group e-mail messages. To assist us in communicating by e-mail, we ask pastoral charges to provide us with a **unique, personal e-mail address for the pastoral charge officers** listed in this section. This will allow us to communicate more economically and reduce our use of paper.

We continue to ask for *mailing addresses* for only two of the eight pastoral charge officers listed: the Board Secretary and the contact person for Stewardship. Please provide *e-mail addresses* for the people in all eight of the select officer positions listed. Please note the following:

1. Board Secretary or Equivalent

Please provide the name and full mailing address (including postal code) of the secretary of your charge's Official Board or equivalent. For the Board Secretary position, the most recent name, address, and e-mail address in our database has been pre-printed for your reference. *Please enter changes only*, to the right of the pre-printed information. (*The Board Secretary's home address is not required if you wish to have correspondence from the General Council Office directed to the charge's mailing address.*) As noted above, **please also provide or update an e-mail address for the Board Secretary**. The name of the Board Secretary will be listed along with those of the professional ministerial staff in the *Year Book, Volume II—Directory*. Official correspondence sent from the General Council Office to the charge will be addressed to the Board Secretary.

2.–8. Other Pastoral Charge Officer Positions

- The names of the other pastoral charge officers currently in our database are pre-printed on the form, together with the e-mail address that we have on file for that person.
- For each of the selected officer positions, if there is a change or correction to be made, please visit ChurchHub.ca, COF Roles tile and enter the new officer's name **and unique, personal e-mail address**. 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.
- For all positions, we will collect address information for mailings. 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, and are returning paper forms, write "N/A" in the space provided for the person's name.
- If there is no change to the name or e-mail address for the person currently listed for a position, please leave the update boxes blank. This indicates clearly to us that there is no update required.

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 adds 600 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 direct us to use the official charge mailing address for all committees. The church office or minister then distributes the information to the appropriate persons. Our mailing procedure is designed so that most mailings now go to the official charge mailing address, using a position title such as "Church Organist or Music Director." This change, together with the increased use of e-mail communications, has reduced our need to collect personal addresses for most of the charge officer positions. Mailings to Board Secretaries will still go to the address specified on 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 mailing 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.

(Please ensure that a copy of pages 10–15 is given to each treasurer who will work on the forms.)

Property & Insurance Information

For reference, the most recent information on file has been pre-printed in the column titled “2019 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.

				1	5	0	0
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For accurate results, please enter a response to each question, even if the value is 0.

In the Pastoral Charge Identity & Membership, Property & Insurance and Financial Informations 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 29

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 total property and liability insurance premium.

26. 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.

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.

NOTE: The calculation the Statistics Office uses is as follows: Opening Balance January 1, 2020 (Property.28) + Bequests (A.4a) + Investment income (A.4f) (per Schedule 6 - Detailed financial information, Box 4580 of the Registered Charity Information Return (T3010)) + unrealized gains/(losses) (A.4g) + Memorial Donations (A.4h) – amount transferred from Investments/Capital = Closing Balance December 31, 2020. Please explain if this calculation results in a figure which is significantly different than that which you are entering in Section 4, question 28 of the Statistical Forms.

- 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. **Any increase should correspond to amounts recorded in Section 5, Part A, question 6 and decreases should correspond to amounts recorded in Section 5, Part B, question 9.**

(We are not concerned with debt internal to the pastoral charge; the word “Liabilities” has been removed from this question to avoid confusion.) If your charge has paid off its debt in 2020, print “Delete.” (Congratulations!)

Financial Information

The finance section has been revamped following changes required as a result of remits being approved. Revenues are itemized in greater detail, and we are formally tracking assessments.

Please refer to these instructions to provide a reasonable picture of your pastoral charge's finances in 2020. The Financial Information 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 the financial information, 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 2020 figures.

In addition, a separate **summary page** of your charge's statistics from 2019 is provided in your statistical package. This summary includes the receipts and expenses from 2019, as reported by your charge, a comparison of total reported receipts and expenses, and a calculation of Year Book Column 40, the charge's 2019 operating expenses.

The Statistics office has developed spreadsheets and additional support materials designed to assist those responsible for preparing financial information. If you wish to obtain these materials, please contact the office, using the contact information on the cover of this Instruction Booklet. The Instruction Booklet will also be e-mailed to treasurers for whom we have an e-mail address.

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.

Definition of Year Book Column 40 (Operating Expenses): Column 40 of the *Year Book, Vol. 1* (Expended for the Operation of the Pastoral Charge, including Salaries) is the sum of Section 5, Questions B.3, B.4, B.5, B.6, & B.7—essentially, all expenses except M&S and other charitable contributions, and capital projects or major renovation costs..

How the Statistics office reviews Financial Information figures

When reporting receipts and expenses for 2020, please include amounts in funds (e.g., Building Fund, Memorial Fund, CEC, Capital Fund, Manse Fund, Trustees) in addition to the General or Operating Fund. 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 2020. 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 Worksheet, Form A: *for your files; use this worksheet only if you find it helpful; do not return with blue forms.*

Instructions for Questions A.1 to A.6—Receipts

Please respond to 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, pre-authorized remittances (PAR), loose offerings, etc., for the operation of the charge and its preaching places and all givings for Mission & Service. **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 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 including such amounts in A.3 if raised through fundraisers or church organizations, or 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, amounts raised to support the operation, mission, and ministry of the pastoral charge, Mission & Service, donations to other non-United Church causes, and other. Please enter the amount raised **net** of expenses incurred to raise the funds.

A.3 Include total amounts raised by the pastoral charge through fundraising activities. For example, amounts raised to support the operation, mission, and ministry of the pastoral charge, Mission & Service, donations to other non-United Church causes, and other. **Fundraising** events may include: special fundraising events, auctions, church suppers, rummage sales, etc. Please enter the fundraising amount raised **net** of expenses incurred to raise the funds. Do **not** include amounts raised by the UCW or other women’s groups; those amounts should be reported in A.2.

A.4. Include:

A.4(a) Total amounts raised from bequests received. (The question refers 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. Report the total dollar value of bequests and other estate gifts received in 2020. Other estate gifts would include annuities, gifts of insurance, trusts, stripped bonds, and items of property reflecting their approximate value. Some bequests are received over a period of two or more years. If the value reported represents the second or third year of a bequest, the bequest should not be counted.) (not included for assessment purposes).

A.4(b) Total number of bequests received. (Report the number of bequests and other estate gifts (defined above) received in 2020. If the value reported above represents the second or third year of a bequest, the bequest number should not be counted.)

A.4(c) Rental income **net** of expenses incurred to raise the income

A.4(d) Number of external groups using the property

A.4(e) Property sales (not included for assessment purposes).

A.4(f) Total Market Gains/(Losses) from Investments (excluding any transfers in or out)

A.4(g) Amount of annual change in unrealized gains/(losses)

A.4(h) Donations to memorial fund (money received through donations in memory of a deceased individual)

A.4(i) Government grants received—includes **Canada Emergency Business Account (CEBA)** and Canada Emergency Wage Subside (CEWS) grants, or grants received from any external source (excluding Mission Support Grants) (Not included for Assessment Purposes).

A.4(j) GST/HST/PST/CRA rebate (not included for assessment purposes).

A.4(k) Insurance loss payouts (not included for assessment purposes).

A.4(l) Restorative care plan reimbursements (not included for assessment purposes).

A.4(m) Expense recovery—sharing a minister and/or personnel with another pastoral charge. (*Note:* If you are sharing your minister or personnel with another pastoral charge, please record the amount received from the other pastoral charge here. Your revenue recovery and their expense should match. Also, please indicate which pastoral charge you are sharing with, so we can appropriately indicate this relationship in Volume II, Part V, of the *Year Book* (not included for assessment purposes).

A.4(n) Other

A.5. Include any givings made specifically for (a) ongoing capital and/or building funds through weekly envelopes, pre-authorized remittances (PAR), donations, and (b) givings for new major capital building campaigns (one-time projects of an enduring nature costing \$10,000 or more, i.e., solar panels, roof, parking lots, elevators/lifts, etc).

A.6. Include amounts borrowed in 2020 from sources external to the pastoral charge including loans through the **Canada Emergency Business Account (CEBA)**. 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 Property & Insurance, Question 29 (total charge indebtedness).

A. Appeal. Record amounts raised in 2020 that will be paid out in this and/or future years for United Church Appeals. The expenditure of these monies will be recorded in Financial Information, Part B, Question 1. (Deducted for Assessment Purposes).

A. Other Charitable. Record amounts raised in 2020 that will be paid out in this and/or future years for Other Charitable Purposes. The expenditure of these monies will be recorded in Financial Information Part B, Question 2a-c. (Deducted for Assessment Purposes).

Instructions for Questions B.1 to B.9—Expenses

Note: Do not include money remitted for Mission & Service under any expense line. That information is on file from your charge’s M&S records with the national Finance Unit, and it will automatically be included in the pastoral charge’s statistical figures for 2020. This process ensures accurate reporting of the M&S figures.

In general, Questions B.1–B.2 and B.4–B.9, plus the remittance to M&S, represent specific expenses.

Expenses not covered by these specific questions should be included in **Question 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 or Regional Council. Include donations from your UCW for United Church appeals. For example, include appeals for emergencies, theological colleges, church camps, Conference or retreat centres. **Do not include Denominational or Regional Council assessments, or money transferred for Mission & Service** in the figure you calculate for B.1

B.2. Include all monies paid out from the pastoral charge and any of its groups or organizations (including the UCW):

- a)** for local church mission (ie, benevolent fund, food banks, refugee families, youth group mission initiatives);
- b)** United Church ministry beyond the local church (ie, United Church identified community ministries, Canadian Foodgrains Bank, KAIROS); and
- c)** other non-United Church charitable givings for projects that are not part of or supported by the United Church (ie, hospitals, health charities, the Bible Society, global charities).

As noted on page 13 in the text box below A.1, “flow-through” or “directed” contributions should be reported consistently, being included under both receipts and expenses. 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 and Trustees. Include **(a)** Denominational and Regional Council assessments, **(b)** office operation, **(c)** maintenance and repairs, **(d)** heat/light/water, **(e)** manse expenses, **(f)** taxes, **(g)** insurance, **(h)** staff benefits (such as group insurance, CPP/QPP, EI, pension contributions), **(i)** honorariums, **(j)** study and book allowances, **(k)** church group expenses (including UCW, Trustees, Sunday School, etc.), **(l)** expense of sharing a minister and/or personnel (**not pulpit supply**), and **(m)** other. In general, any expenses not reported under the other categories in Section B should be included here.

Note: If you used the services of a minister from another pastoral charge and did not have a minister assigned or called to your pastoral charge, please enter the amount paid to the other pastoral charge here in B.3(l), not in B.5(a) or B.6(a). Please indicate the name of the pastoral charge that shared their minister.

Do not include ministry personnel base salaries, travel expenses, housing allowances; non-ministry personnel salaries; capital expenses, debt repayment, or donations to community outreach or other charities. These have their own categories.

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 2020 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.)

NOTE: Do not deduct any amounts received from the Canada Emergency Wage Subsidy (CEWS) from base salaries.

B.4. Include base salaries paid for all *non-ministry personnel*, for example, (a) church secretaries/administrators, (b) custodians, (c) organists, pianists, (d) other, including 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(i).

B.5(a). The highest salary amount paid to one minister (ordained, diaconal, designated lay minister, or student), during the period January 1 to December 31. If two ministers served the charge at different times during the year (with no overlapping periods), enter the combined amount paid to both persons. If the minister is paid on the comprehensive plan, please enter the amount on line B.5(c).

Note: If your charge made payments to a minister “on leave” during 2020, and was reimbursed through the Restorative Care Plan, please contact the Statistics 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.5(c). Highest comprehensive salary amount paid to one minister. If two ministers served the charge at different times during the year (with no overlapping periods), enter the combined amount paid to both persons, if both are on the Comprehensive Plan.

If you used the services of a minister from another pastoral charge and did not have a minister assigned or called to your pastoral charge, please enter the amount paid to the other pastoral charge in B.3(l), not in this category.

B.6(a). Leave blank unless there was more than one minister simultaneously for at least part of the year. If not using the Comprehensive Plan model, and there were two or more ministry personnel, include base salaries for all ministers not reported in B.5(a). If your ministry personnel, not reported in B.5(a) are now paid using the Comprehensive Plan, please enter their individual base salaries on lines Minister 1 through Minister 5, with the second-highest-paid ministry personnel in Minister 1, the third-highest in Minister 2, etc.

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 enter an amount here.

B.8. Include amounts paid out for **(a)** major improvements to church or manse, new equipment, or **(b)** 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 result in value increases in Section 4, Questions 25 and 27(c).

B.9. Report principal and interest payments against loans from organizations external to the charge. Significant amounts paid out against loan principal, reported in B.9, should result in a decrease in the value of charge indebtedness reported under Section 4, Question 29. Amounts paid to a minister replacing a minister on restorative care should be entered here.

National Assessment Calculation

The assessment target for all communities of faith is based on the assessment formula of 4.5 percent of total revenues raised for pastoral charge operations adjusted for outward giving, bequests, and asset sales. For online submissions, a page has been included showing the calculation of your projected national assessment. Specific line information that you provide in Section 5A will populate this form. Each time you update and save information in Section 5A—Receipts, the assessed value will change.

Faith Development

In this section, information is collected concerning Church (Sunday) School total, 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 2021 *Year Book*.

Since pre-printed figures from 2019 do not appear on Section 6, a **summary page** of your charge's statistics from 2019 is provided in your package, including the School and Group figures reported for 2019.

Please enter the information for 2020 in the boxes provided, one digit per box, with blank (unused) boxes to the left. For accurate results, **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, be sure to provide details here.
- Answer 1 to 6 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 record the number of your teachers and officers (including all supply, occasional, substitute teachers and helpers) in Question 6.
- For Question 5, 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 Question 1.
- If you enter a number in Pastoral Charge Identity & Membership for Church School, you must enter numbers in questions 1 – 6. If you enter numbers in Questions 1-5, you must have a number in Question 6 and if you have a number in Question 6, you must have numbers in questions 1-5 and question 2 of the Pastoral Charge Identity & Membership page.

Membership in Groups

- In this section, we are seeking simple numerical totals for membership in groups according to age ranges.
- Answer Questions 7-11 and 13-16 with numeric figures. Please do not leave blanks. 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 12, as they are counted separately in 13-16.
- For Question 12, add together the numbers you have provided in Questions 7 to 11.
- Remember to record your United Church Women or other women's group membership in 13 or 14. In your figure, include all UCW members, be they active, inactive, life, or associate members.

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. Please also provide an unique, personal e-mail address, if available.
- **Presidents of Other Women's Groups:** If there are other women's groups operating on the charge, please provide the name and a unique, personal e-mail address of the president or contact person, the name of the group, and if applicable, the name of the congregation.

The form provides space for four women's organizations and presidents. If you have more than four, please attach the additional groups and names on a separate page.

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 Pastoral Charge Identity & Membership.

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

Please complete the "blue forms", using the enclosed Shared Ministries (SM) forms designed especially for shared ministry charges as working forms.

The **Annual Shared Ministry Statistical Forms** were developed some years ago by staff in the former Alberta and Northwest Conference. With gratitude to the Conference, we continue to offer them to shared ministry pastoral charges across the country. Please forward any suggestions as to how they might be further refined to the Statistics office.

An electronic version of the Annual Shared Ministry Statistical Forms is now available from the Statistics office. On request, we will gladly e-mail a copy of these forms to your pastoral charge.

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.

Pastoral Charge Identity & Membership: 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.

Ministry Personnel & Officers: List pastoral charge staff members and officers regardless of denomination.

Property & Insurance: 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.

Financial Information: As in the Property & Insurance section, insert exact United Church totals if they are known; otherwise, calculate figures on a percentage basis.

Faith Development: 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.

Additional Notes

Other Documentation to Include with Your 2020 Statistical Forms

Please also provide the Statistics office with a copy of your pastoral charge's *2020 Annual Report(s)*. These reports help clarify questions that arise with your forms. We then forward all report(s) to the applicable Regional Council archives. If you have an electronic version, you may e-mail the annual report to us at statistics@united-church.ca or upload it to your "Published Documents" folder on ChurchHub. Only one copy is required, so please do not send an electronic copy and a hard copy.

2020 Statistics Forms and Instructions Available on the United Church Website

In late January 2021, the following documents will be available online at united-church.ca. Search for "Annual Statistics":

- this instruction book, complete or in sections, including the accompanying worksheet Form A
- an overview of some practical aspects of completing and returning your statistics
- generic copies of each page of the 2020 Statistical Forms (without the pre-printed information specific to your pastoral charge) as PDFs

We also draw your attention to the **Find a Location** feature on united-church.ca.

Please use the Online Reporting Option!

Our **new** Statistical Reporting and Assessment interface is now ready on ChurchHub.ca! The interface is multi-device, multi-platform. We do not recommend using a cell phone to file your results due to size however, tablets, iPads, laptops, and desktops are all acceptable. The Installable Web Application (IWA) platform has been retired as of December 31, 2020. **Beginning mid-January 2021**, you can complete and submit your annual statistics and information updates on ChurchHub.ca.



Since its launch in 2009, there has been a steady increase in the number of forms submitted online. Last year, 1,230 pastoral charges submitted their 2019 stats online (up from 330 in the first year and 1,173 for 2018). We have received many positive comments as well as suggestions for improvements, many of which have been implemented/incorporated in our new ChurchHub.ca platform.

How to Submit Your Stats Online (beginning mid-January 2021)

- Please log in at ChurchHub.ca with your Community of Faith account and select the Annual Statistics tile on the “My Community of Faith” page. The form will appear in the same order as the blue forms. Note: You will not be able to access the Community of Faith page if logging in using a minister e-mail address – it must be the e-mail for the Pastoral Charge.

The online forms resemble the printed forms. There are **4 tabs** for you to update.

- You can enter and exit these tabs as many times as you need. You can save your work (please save frequently) and it will be retained when you return (changes cannot be made after forms have been submitted). Please contact the Statistics Office if you need to make a change.
- On each tab, 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.
- Each statistics screen includes your charge’s 2019 statistics, side by side with the 2020 questions.
- Alert flags make you aware of potential keying errors and prompt you to check and/or provide explanations.

When you have completed the 4 tabs, you will be prompted to **Submit Your Forms** to our office. Should an error message pop up, please go back to the applicable tab and make the necessary corrections. After your submission, you will have the option to print your completed forms or save them as a PDF file. *Note:* you will not be able to make changes to your forms after submitting. If you do need to make changes, please contact the Yearbook Office (see front cover).

If you submit your forms online, we invite you to e-mail us a copy of your 2020 Annual Report.

We hope all charges will use this online option. Good luck!