

# **INSTRUCTIONS FOR**

# SESSION ANNUAL STATISTICAL REPORT

# FOR THE YEAR 2015

This workbook is designed to guide you through the statistical information that you must provide to the presbytery in accordance with G-3.0202f. The Session Report is prepared annually by the Office of the General Assembly, and the information you provide will be combined with that from other PC(USA) congregations to become the "OGA Statistics" that appear annually in the *General Assembly Minutes*, Part II, *Statistics*.

*PLEASE NOTE*: The session **needs to approve** the report as early as possible after December 31, 2015. This is a session report and **DOES NOT** require approval at a congregational meeting.

If you have any questions on how to use this workbook, please call your presbytery office.

Thank you for your work and support.

### FREQUENTLY ASKED QUESTIONS

1. What is the address for the website to enter my statistics?

The web address is <a href="http://oga.pcusa.org/stats">http://oga.pcusa.org/stats</a>. The online statistical reporting portion will become active on December 4, 2015. The program works best using one of the following web browsers: Firefox, Safari, or Chrome.

If you are using Internet Explorer, it will be necessary to do the following from the website:

Select 'tools' (alt+t) from the Internet Explorer toolbar menu Select 'Compatibility View Settings' The address of the page you are on should be displayed in the box Select 'add'

2. When is the deadline?

Each presbytery determines their own deadline. Contact your presbytery for the specific date.

3. My user name and password won't work?

The passwords are case sensitive. Also, people confuse the letter 'O' with the number zero '0.' If one doesn't work, try the other. After three unsuccessful attempts to login, the system will 'lock' your user name. We scan for locked records and unlock them frequently.

4. I don't know my user name and password?

Contact your presbytery if you don't know or have lost your login information. The Office of the General Assembly will be unable to assist you with the issue.

5. Do I have to enter everything at one time?

No, you can come and go as often as you like until the deadline date or until you hit the 'Submit' button. The program is available year-round, but you can only update statistical data for about two months or until you hit 'Submit.'

6. Oops, I hit the 'Submit' button and I have not entered any data.

No problem. Call your presbytery for instructions on what to do. We can 'unsubmit' your church easily if no data has been entered. If data has been entered, it will clear out any data you have entered.

7. Can I access the program after I submit my report?

Yes, the program is available year round. You can view or print your data throughout the year.

8. We don't have access to a computer. How should we submit our report? Or, who should I call if I have a late report or can't meet the deadline?

Contact your presbytery regarding alternate forms of submitting your statistics. It is important to note that you are submitting your statistics to the **presbyter**y not the Office of the General Assembly.

9. I've submitted my statistics and need to make a correction.

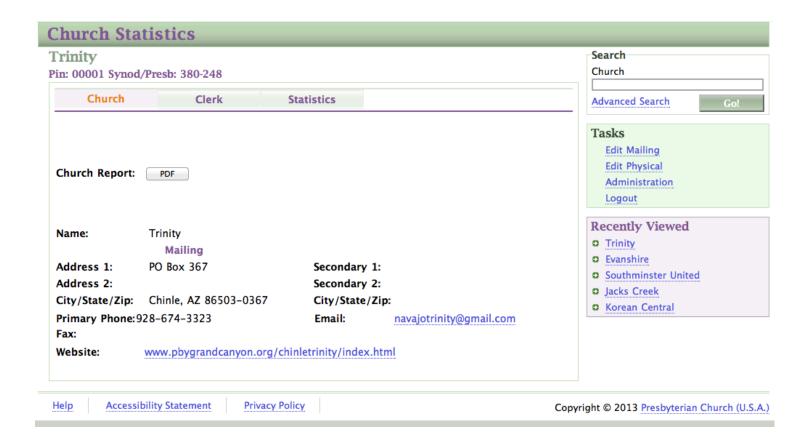
If you have already hit the 'Submit' button you'll need to contact your presbytery to make a correction. Do not contact the Office of the General Assembly, they cannot make changes to your report.

10. I updated my church address but it doesn't update?

When you make an address change, you are letting the Office of the General Assembly (OGA) know that you would like to make a change. On a daily basis, the OGA reviews the list of changes submitted. The changes are then made and reflected. It could be up to 48 hours before you see the change.

Don't frustrate yourself. Remember the ten-minute rule. If after ten minutes you have a question, problem, or just need help with something email <u>OGARecords@pcusa.org</u>.

One last important item; this only comes once a year!



## **BASIC CHURCH INFORMATION**

This is the starting point once you login. Along the top of the page are the various tabs to move around the program. Along the right side are options for updating the church address. There is now the option to indicate two addresses, mailing and physical. To make changes, use the option on the right "Edit Mailing" or "Edit Physical."

You can choose either editing option to make changes to your phone/fax number, website, or email address.

Changes cannot be made to your church name. You will note that we do not use the words "Presbyterian Church" after the name. The words "Presbyterian Church" are generically added to church's name for mailings and other purposes. If you would like to change the official name of your church, contact your presbytery office.

To change your password chose the option Change User Password.

To print a copy of the current year's report, hit the button labeled 'PDF." This will bring up a PDF version of the report.



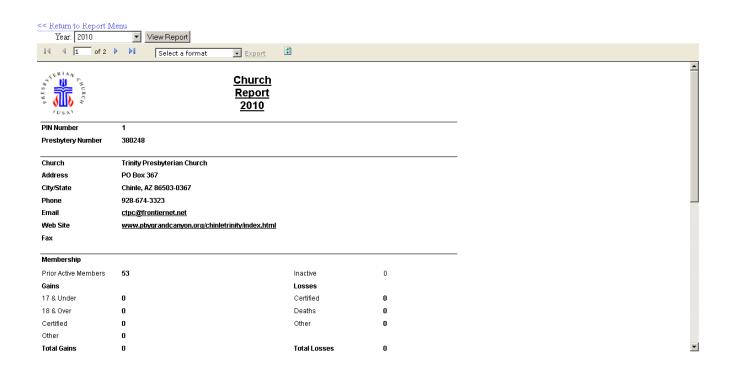
To print or download a copy of your report press the option "Reports." You'll need to work through a series of options.

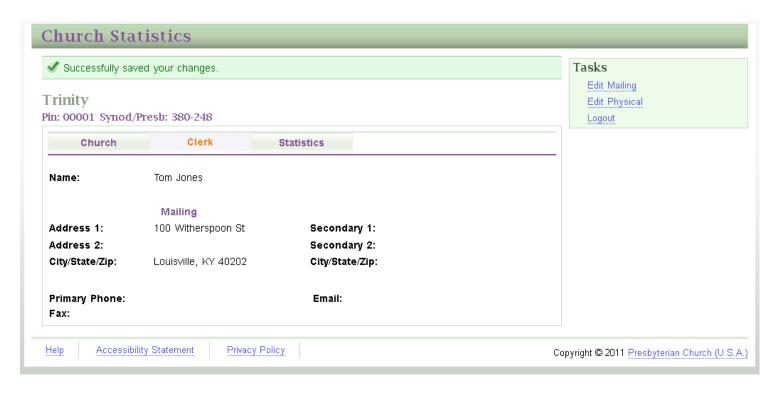


To view or print a copy choose "Church Report." It will then ask you for the year you would like to view.



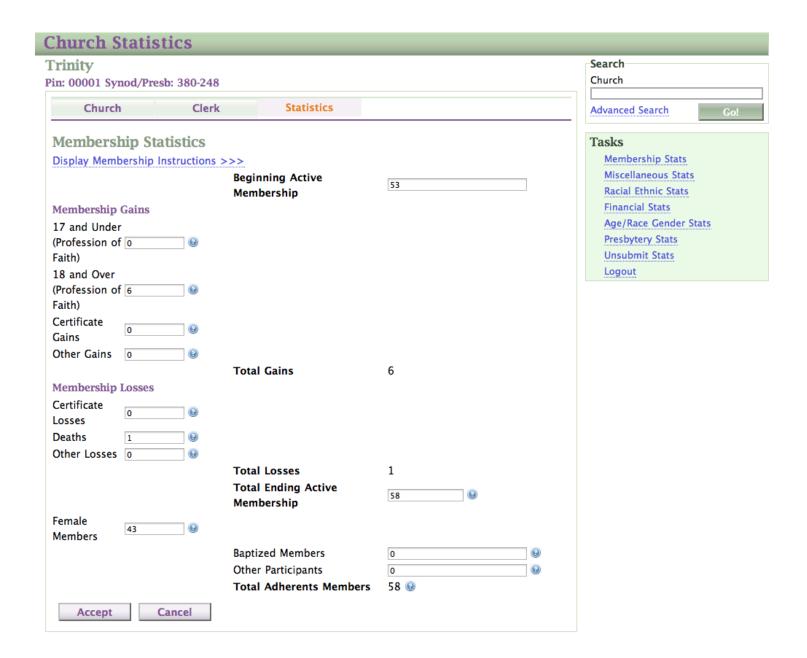
Your report will appear in a box, scroll down to view page one, then use the blue arrow buttons on the top of the page to move to the seond page. To print a page use the drop down box that reads "Select a Format." I suggest using the Acrobat (PDF) option for a clean copy of your report. Press the Export button to download your desired format.





Pressing the "Clerk" tab will take you to the clerk of session page. The primary tab to make changes is the "Edit Mailing" address. You do not need to fill in the Physical address. Clerks of session can also add a phone number and email address if desired.

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The 'Tasks" area list the various statistics pages requiring entry. To save data on a page use the Accept button.

The ending active membership does not automatically calculate. The page must balance in order for the changes to save.

### **Membership Instructions**

**BEGINNING BALANCE AS OF 12/31/14.** Beginning Balance shows your church's active membership as of December 31 of last year (G-1.0402). This is the official membership figure that appeared in the *2014 Minutes of the General Assembly*, Part II, *Statistics*. **THIS FIGURE CANNOT BE CHANGED**. If the actual membership as of 1/1/15 was different than the displayed figure, you will need to make the appropriate adjustments to "Other Gains" or "Other Losses."

#### MEMBERSHIP GAINES

PROFESSIONS OF FAITH, REAFFIRMATION, RESTORATION. Enter the number of members received this year through the (first-time) profession of faith, reaffirmation, or restoration to the active members' roll (G-1.0303 a & c.)

For persons aged 17 and younger &. For persons aged 18 and older

CERTIFICATE. Enter the number of persons received into active membership by certificate of transfer from other churches (G-1.0303b).

OTHER GAINS. Enter all other additions.

**TOTAL GAINS**. This figure will automatically calculate as you enter gains.

#### **MEMBERSHIP LOSSES**

CERTIFICATE. Enter the number of persons dismissed to other churches for whom certificates of transfer have been issued (G-3.0204a)

DEATHS. Enter the number deleted from the roll because of death (G-3.0204a)

*OTHER.* Enter all other reductions (G-3.0204a) including persons temporarily excluded or removed from active membership (D-12.0105).

**TOTAL LOSSES.** This figure will automatically calculate as you enter losses.

**TOTAL ENDING ACTIVE MEMBERSHIP (12/31/2015)** Add Beginning Membership and Total Gains, then subtract Total Losses. This figure should equal the number of persons (male/female) that appear on the active members roll. **(This is the figure per capita is based on.)** You must enter this number. **It will not automatically calculate.** 

**FEMALE MEMBERS.** Enter the number of females included in your total active membership.

**BAPTIZED MEMBERS**. Enter the number of persons who appear on the baptized member's roll. A Baptized member of a particular church is a person who has received the Sacrament of Baptism and who has been enrolled as a baptized member by the session but who has NOT made a profession of faith in Jesus Christ as Lord and Savior. (G1.0401)

**OTHER PARTICIPANTS**. Enter the number of persons who appear on the other participants roll. Persons who are not members of, or who may have ceased active participation in, the Presbyterian Church (U.S.A.) are welcome and may participate in the life and worship of this church and receive its pastoral care and instruction.

**TOTAL ADHERENTS**. This figure will automatically calculate. It is the sum of Total Ending Active Membership + Baptized Members.

# **Church Statistics**

#### Bdecan Tasks Pin: 10155 Synod/Presb: 101-55 Membership Stats **Statistics** Church Clerk Racial Ethnic Stats Financial Stats Miscellaneous Information Age/Race Gender Stats Submit Stats Display Miscellaneous Information Instructions >>> Logout Age Distribution of Members 25 & Under 26 - 45 46 - 55 56 - 65 Over 65 **Total Distribution** 0 Average Attendance 0 Affiliate Members Ohristian Education Birth - 3 Kindergarten 0 Grade 1 Age 4 Grade 4 Grade 2 0 Grade 3 Г 0 Grade 5 Grade 6 Г Grade 7 Grade 8 Г Grade 9 0 0 Grade 10 0 Grade 11 0 Grade 12 0 Young Adults 0 Over 25 0 Teach / Office 0 Total Church School 0 **Total Baptisms** Child Baptisms Adult Baptisms Active Officers Session: Men Women Total Session 0 Total Deacons () Deacons: Men Women Does the Session serve the Trustees function in the church? -select-Accept Cancel

## MISCELLANEOUS INFORMATION

**AGE DISTRIBUTION OF ACTIVE MEMBERS**. Enter the number of active members in each category. This figure needs to be equal or less than your Total Active Membership.

AVERAGE ATTENDANCE AT WORSHIP. Enter the average weekly worship attendance.

**AFFILIATE MEMBERS.** Enter the number of persons who appear on your affiliate member rolls. An affiliate member of a particular church is an active member of another church of this denomination or of another denomination of Christian Body, who has temporarily moved from the community where the church of active membership is situated, has presented a certificate of good standing from the appropriate governing body of that church, and has been received by the session as an affiliate member (G-1.0403) Persons often in this category are college students & 'Snow Birds.'

CHRISTIAN EDUCATION ATTENDANCE BY AGE GROUP. List the number of persons in each category according to the education records for 2015. This total should include, but not be limited to, small groups, such as, Bible studies, spiritual formation groups, and youth groups. This total will automatically calculate when you hit the 'Accept' button. Do not include Vacation Bible School.

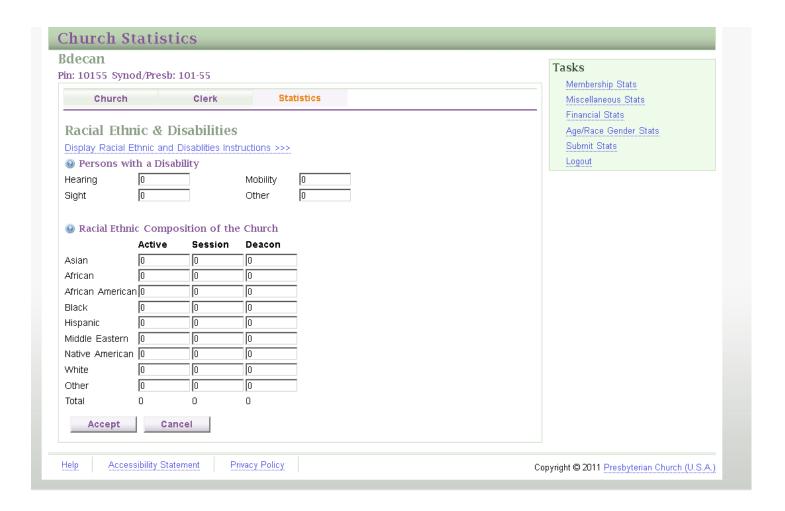
BAPTISMS. Enter the number baptized in 2015.

Children (Children of believers and professions of faith by persons aged 17 and under)
Adults

**ACTIVE OFFICERS**. Enter the number of officers serving as of 12/31/15. The totals will automatically calculate when you hit the 'Accept' button.

Active Officers	Men	Women	
0 , (0 , 51, )			
Session (Ruling Elders)			
Deacons			

Does the session serve the Trustee's functions in the church? Y/N



## **RACIAL ETHNIC & DISABILITIES INFORMATION**

**PERSONS WITH A DISABILITY**. Statistics gathered on persons with disabilities will be used by entities and committees to formulate programs and policies of the Presbyterian Church (U.S.A.), thus carrying out the mandate for inclusiveness contained in the *Book of Order* (G-3.0103 & F-1.0403).

In order to complete this section, you (as clerk or pastor) are not expected to conduct a survey of the congregation, but to rely on personal knowledge of individuals' disabilities. According to the definition adopted by the World Health Organization, persons with disabilities are those who have physical or mental disabilities that **substantially** limit their participation in one or more of life's activities.

Hearing Impairment. Persons with a major hearing loss or deficiency.

*Mobility Impairment.* Persons whose ability to move about is substantially impeded. This would include persons suffering from diseases such as arthritis and persons dependent upon canes, crutches, or wheelchairs, etc.

Sight Impairment. Persons with severe visual limitations.

Other. Persons with less easily discerned disabilities such as heart disease, diabetes, epilepsy, or mental conditions.

### **RACIAL ETHNIC COMPOSITION OF THE CHURCH**

The 202nd General Assembly (1990) instructed the Office of the General Assembly to gather information regarding Racial Ethnic Composition (*Minutes*, 1990, Part I, p. 282.) Inclusiveness is an important part of the life of the church, "The Presbyterian Church (U.S.A.) shall give full expression to the rich diversity within its membership and shall provide means which will assure a greater inclusiveness leading to wholeness in its emerging life." (G-4.0403)

This information is used in a variety of ways. Two of the ways in which this information is used is as follows:

- (1) The 208<sup>th</sup> General Assembly (1996) passed a recommendation that "1. affirms the goal of increasing the racial ethnic membership to 10 percent of the Presbyterian Church (U.S.A.) membership by the year 2005, and to 20 percent by the year 2010;" (Minutes, 1996, Part I, p. 378).
- (2) The General Assembly Committee on Representation (COR) uses the data at their Synod Committee on Representation Training Workshops, that are held biannually.

In making the entries for this category, be guided by how an individual describes themselves. The category of Native American applies to American Indians and Eskimos. The figure entered as the total for Active should be equal to or less than the figure shown for Total Active Membership, on the Membership Page. The total Elders and Deacons should be equal to or less than the amounts given for Active Officers, on the Miscellaneous Page. *Use numerical figures, not percentages.* 

The Advocacy Committee for Women's Concerns (ACWC) recommended to the 219<sup>th</sup> General Assembly (2010) to do the following:

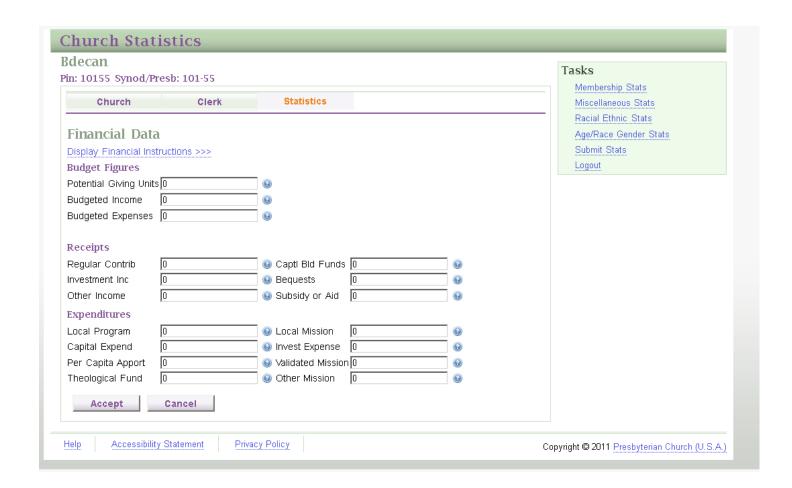
Direct the Office of the General Assembly (OGA) to incorporate into the Session Annual Statistical Report (SASR) specifically by name the categories of African, African American, and Middle Eastern.

### Full list of Categories:

Asian, African, African American, Black, Hispanic, Middle Eastern, Native American, White, Other

The information on the Racial Ethnic page compares figures entered on the Membership page and the Miscellaneous page. The Active figure needs to be equal to or less than the 'Total Ending Membership' on the Membership page. The Session and Deacons columns need to be equal to or less than the 'Total Session' and 'Total Deacons' on the Miscellaneous Page.

The items on this page total down each column and are separate figures.



### **FINANCIAL INSTRUCTIONS**

The Financial information you provide is used to show trends within the church. The big questions are: How does the congregation receive money? How does the congregation spend money? And, to break it down further, the General Assembly is only interested in a few ways that your church receives and spends money. This is not meant to be a balance sheet for the congregation. It will not include all moneys that are received or spent by the church.

Here are two tips to help you fill out the information:

1) The difference between Local Program, Local Mission, Validated Mission, and Other Mission: Who is spending the money?

Local Program - The session decides how to spend the money. General operating cost to run the church.

Local Mission - The local food pantry decides how to spend the money.

Validated Mission - Synod, Presbytery, or General Assembly decides how to spend the money.

Other Mission - Groups not included above, ie. You send money directly to Africa.

2) Investment Income/Investment Expense

Did you convert any investments to cash to help cover your budget? This would be included under Investment Income. Did you invest any new money? This would be an Investment Expense.

Do not show the value of the congregation's investments. These figures would not reflect any changes in the investment, such as a loss of profit.

POTENTIAL GIVING UNITS. Total number of households in the congregation.

**BUDGETED INCOME & BUDGETED EXPENSE.** These categories were added to obtain general information regarding a church's budget. Your congregation might only have an expense budget or your income/expense could be the same number. These are those figures that you have been working from all year. Many churches work with a 'Faith Budget,' meaning you only have budgeted expenses for the year.

### **RECEIPTS**

CONTRIBUTIONS. Enter the total of all payments on pledges (current as well as delinquent), loose offerings (cash or check), and special offerings received by all treasurers (the church, all boards, and organizations of the church). DO NOT INCLUDE capital and building funds, investment income, bequest, other income, aid and subsidy.

CAPITAL AND BUILDING FUNDS. Enter the total of all moneys received for capital purposes, extraordinary repairs, building funds, and equipment with anticipated useful life in excess of three years.

INVESTMENT AND ENDOWMENT INCOME. Include all returns, such as interest and dividends, received from stocks, bonds, and other investments and endowments owned by the church. Also include the proceeds from the sale of investments held by the church. Do NOT INCLUDE the monetary value or principal amount of investments that continue to be held by the church.

BEQUESTS. Include the total monetary values of all new gifts from estates received by the church from 1/1 to 12/31. Include all one-time contributions of anything of value received by the church from estates, such as bequests, planned gifts (gift annuities, charitable trust, life insurance), stocks, real estate, or other non-monetary gifts.

OTHER INCOME. Enter the total of all other income, such as rent or other reimbursements from organizations using church property. This would include such things as tuition/fees for day care, day school, etc.

SUBSIDY OR AID. Enter the total of all moneys received from other churches or from presbytery, synod, or General Assembly agencies to be used in local mission and program.

#### **EXPENDITURES**

LOCAL PROGRAM. The total of all moneys, from all sources, expended for current operations of the congregation, such as salaries and wages, pension and social security payments, printing, postage, materials, utilities, insurance premiums, payments of interest and principal loans, whether or not secured by mortgage, etc.

LOCAL MISSION. The total of all moneys paid for local mission programs and projects approved and directed by the session and to local ecumenical bodies.

CAPITAL EXPENDITURES. The total of all moneys expended for real property, whether improved or unimproved, the construction of new buildings, extraordinary repairs or renovations of existing buildings, and equipment with anticipated useful life in excess of three years.

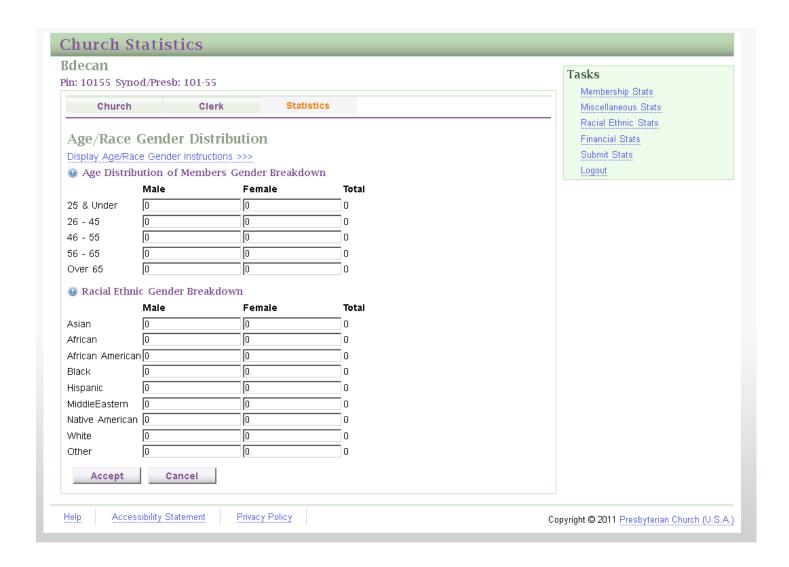
Include the total amount of moneys newly placed into savings or investments (such as certificates of deposit, stocks, bonds, money market accounts, reinvested dividends) during the year, and remaining invested. Also included would be investment costs such as moneys expended to facilitate new investments or to maintain existing investments or endowments such as brokers' fees, bank charges. Do NOT INCLUDE investments made in earlier years, monies invested in earlier years that were switched from one type of investment to another (e.g., stocks to bonds, or one stock to another.)

PER CAPITA APPORTIONMENT. The total of moneys expended for synod, presbytery, and General Assembly apportionment.

*VALIDATED MISSION PC(USA)*. The total of all moneys given to synod, presbytery, and General Assembly agencies, including payments toward the mission budgets of these entities. Include synod or presbytery special offerings as well as General Assembly special offerings: One Great Hour of Sharing, Christmas Joy, Peacemaking, Witness, other offerings. Include totals for mission programs and projects related to the Presbyterian Church (U.S.A.) and not already reported as Local Mission.

GENERAL ASSEMBLY THEOLOGICAL EDUCATION FUND. Each congregation is requested to make a voluntary contribution of an amount equal to 1% of the figure reported for Local Program as the congregation's share for the support of the eleven Presbyterian theological institutions. Please take care NOT TO INCLUDE direct support of theological students, direct gifts to any theological school, or other gifts related to theological education.

OTHER MISSION. Enter the total of all monies expended for mission causes not related to the Presbyterian Church (U.S.A.) and not already included under Session Local Mission.



The Advocacy Committee for Women's Concerns (ACWC) recommended to the 219<sup>th</sup> General Assembly (2010) to do the following:

Direct the Office of the General Assembly (OGA) to adapt the Session Annual Statistical Report (SASR) to collect disaggregated data on age, gender, race and ethnicity.

Unlike the Racial Ethnic page, the columns total *across* not down.

The information on the Age/Race Gender page compares figures entered on the Racial Ethnic page. These figures need to be equal to or less than the numbers entered in 'Active' column.

Example: If you enter 5 Asian Men and 5 Asian Female for a total of 10 Asians, then a 10 or higher needs to be in the Asian Active field on the Racial Ethnic page.