

INSTRUCTIONS – FORMS A1, A2 & A3 CONGREGATIONAL REPORTS

FORM A1 - INFORMATION ABOUT THE PEOPLE WHO ARE MEMBERS

1. Membership as of December 31, 2006

The membership report begins with the number of baptized and confirmed reported in your most recent parochial report.

Baptized: Include all members on your congregational roster who have been baptized. This includes *all confirmed* members.

Confirmed: Include all members who are both baptized and confirmed. This is equal or less than the number of baptized members.

These numbers can be found at the top of Form A0 Find a Congregation Update provided with this annual reports package or on your copy of the Congregation Reports submitted last year. If your congregational records do not agree with the provided numbers, use the statistical adjustment areas (h or f) to correct the values.

As you report the additions and removals to the membership list, be careful to report changes to confirmed members in both the baptized and confirmed columns.

2. New Members received during 2007

New members are added to the congregational roster by one of three methods - baptism, affirmation of faith (formal or informal) and transfer.

• 2a, 2b - Baptism

- If 15 or younger, enter in '2a) By Baptism: children', Baptized column only
- If 16 or over, enter in '2b) By Baptism: adults', both Baptized & Confirmed columns.

• 2d, 2e - Transfer

- From ELCIC cong, enter in '2d) By Transfer from ELCIC...', Baptized or Baptized & Confirmed as appropriate.
- From Anglican or other Lutheran, enter in '2e) By transfer/affirmation of faith...', Baptized or Baptized & Confirmed as appropriate.

• 2c, 2f - Affirmation of Faith

- If a former active member or regular attendee, enter in '2c. By affirmation of faith from responsibility or adherent list', Baptized or Baptized & Confirmed as appropriate.
- If from a Christian denomination other than Anglican or Lutheran, enter in '2f) Affirmation from non-Lutheran congregation', Baptized or Baptized & Confirmed as appropriate.

Remember new confirmed members must be added to the baptized roster as well as the confirmed roster.

• 2g. Statistical Adjustment

If congregational records indicate that there are more members than were previously reported on

the congregational parochial report, use this space

to increase membership numbers to the correct value.

• 2h. Total members received during 2007

- Add the baptized members received from each category reported from 2a to 2g. Report in 2h in the BAPTIZED column.
- Add the confirmed members received from each category reported from 2b to 2g. Report in 2h in the CONFIRMED column.

3. Baptized members confirmed during 2007

Enter baptized members participating in the Affirmation of Baptism (Rite of Confirmation) during the year in the CONFIRMED column.

4. Members removed during 2007

• 4 a, 4b, 4c, and 4d.

Persons who were removed from membership during the year. Losses of baptized but unconfirmed persons decrease BAPTIZED membership only. Losses of confirmed persons decrease both BAPTIZED and CONFIRMED membership.

• 4e. To responsibility list (inactive)

Persons who are no longer active members.

• 4f. Statistical adjustment

If congregational records indicate that there are fewer members than were previously reported on the congregational parochial report, use this space to decrease membership numbers to the correct value.

• 4g. Total members removed during 2007

- Add the baptized members removed from each category reported from 4a to 4f. Report in 4g in the BAPTIZED column.
- Add the confirmed members removed from each category reported from 4a to 4f. Report in 4g in the CONFIRMED column.

5. Total Membership as of December 31, 2007

- Under Baptized: Add 1, plus 2h, then subtract 4g.
 - Under Confirmed: Add 1, plus 2h, plus 3, subtract 4g.
- Remember confirmed members must be removed from baptized roster as well as the confirmed roster*

6. Responsibility list and adherent list

• 6a Responsibility list

Enter the total of baptized and confirmed persons (formerly active members) on your congregation's responsibility list, including those removed during the year and reported in 4e. Should the congregation not have such a list, mark "no record."

• 6b Adherent list

Enter the total of unbaptized, baptized and confirmed persons active with your congregation but not members. Should the congregation not have such a list, mark "no record."

7. Communing Members

Record the numbers of confirmed and unconfirmed

members who communed at least once during the year. Should the congregation not have such records, mark "no record."

8. Worship Services

•8a Sunday worship services

Total the number of all Sunday congregational corporate worship opportunities (a.m. and p.m.) held during the year. Marriages and funeral services should not be included.

• 8b. Weekday worship services

Total the number of all weekday congregational corporate worship opportunities including Lenten, Advent, Thanksgiving, etc. Include services held on Saturday. Marriages and funeral services are not included.

• 8c. Services with Holy Communion

Total all corporate communion opportunities provided for the congregation during the year.

• 8d. Average worship attendance each week

Total the number of individuals present for **regularly** scheduled Sunday and weekday services during the year and divide by 52. **Do not** include seasonal weekday, Advent and Lenten services, Good Friday or special services such as marriage, funeral, congregational anniversary services, etc. Estimate if necessary. Please use a whole number rather than a percentage or fraction.

9. Number of households in total membership

A household is all persons who occupy a housing unit. A housing unit is a house, an apartment, a group of rooms, or a single room providing separate living quarters for one or more persons. This figure may be estimated by using the number of addresses on the membership mailing list.

10. Multipoint parish

Enter the number of congregations in the multipoint parish as of December 31, 2007.

11. Person years

A person year is the amount of work that would employ one person for a year. A person year allows us to compare widely different employment situations easily. Here are some examples:

| | |
|---|------|
| - Full-time for the whole year | 1.0 |
| - Full-time for 9 months | 0.75 |
| - Half-time for the whole year | 0.5 |
| - Full-time for whole year for a two-point parish serving each Congregation equally | 0.5 |

• 11a. For ordained leadership

Report all salaried and hourly employment for all ordained persons employed by the congregation whether they are rostered with the ELCIC or another Christian denomination.

• 11b. For all other salaried positions

Report all salaried and hourly employment for all other persons employed by the congregation in whatever category.

12 Vacancy in ordained positions

• 12a. Vacant positions at December 31, 2007?

If your congregation was without any ordained pastor on December 31st, enter the number one, whether or not the congregation was currently involved in the call process.

• 12b. If any vacancy in ordained leadership was experienced in the year, what was the duration of the vacancy in months?

Enter the number of months for each ordained positions that experienced vacancy during the year.

FORM A2 - INFORMATION ABOUT THE CONGREGATION'S FINANCIAL STEWARDSHIP

Please report only those monies **received** and/or **disbursed** by the treasurer of the congregation. Please report amounts in the detail requested according to the categories on the report. Please check your arithmetic. Please verify the totals against the congregation's yearly cash flow statement. THANKS!

10. Receipts during 2007

•10a. Regular giving

Include envelope offerings for current operating expenses, regular benevolence, building fund and debt retirement; loose offerings; church school offerings; payments on previous years' pledges.

• 10b. Special giving

Include memorial gifts, special gifts from living donors and contributions to special ELCIC benevolence and to Global Hunger and Development Appeal, Canadian Lutheran World Relief, etc.

• 10c. Earned income

Include such items as interest, dividends and rentals. Also include here income received from other programs operated by the congregation including fundraising activities or child care facilities that are not separately incorporated.

• 10d. Grants and assistance

Include all grants and assistance received from the synod or other church wide agencies or from other sources including government, foundations, and other charitable organizations.

• 10e. Cash borrowed

Record the total amount borrowed in 2007 in the name of the congregation, whether or not the money was entered into the congregation's treasury. Sources of loans may be the Church Extension Capital Fund (CECF), lending institutions, individuals, other.

• 10f. Other receipts

Include such items as funds transferred to the congregation's treasury from the principal of endowment and memorial assets; contributions given

by congregational organizations for the support of current operating expenses, including ordinary repair and replacement items. Bequests received during the year should be reported on line 14b.

- **10g. Total receipts**

Total of 10a-f. This equals all receipts for the year.

11. Disbursements during 2007

- **11a. Current operating expenses**

Include disbursements for program expenses for learning (such as church school curriculum and supplies), worship/music, witness and service ministries; staff travel allowance and other travel; youth and adult activities; staff expenses, including salaries, housing, pension and honoraria; office expenses, including supplies, printing, telephone and postage; general expenses, including heat, light, water, sewage, cleaning, maintenance, insurance and taxes.

- **11b. Capital improvements**

Include expenditures for church edifice; educational unit; parsonage(s); other real estate; equipment (but not to replace worn, obsolete or damaged items). All funds paid for capital improvements, both out of the building fund and out of money borrowed, are reported here.

- **11c. Debt retirement**

Include both principal and interest payments.

- **11d. ELCIC regular benevolence**

All money remitted to the SYNOD for benevolence in support of the Synod and the ELCIC.

- **11e. ELCIC directed gifts**

Money remitted to the SYNOD for special causes, for example, World Mission sponsorship, Canadian Mission sponsorship.

- **11f. Global Hunger and Development Appeal**

Money remitted to the SYNOD designated for GHDA.

- **11g. Canadian Lutheran World Relief**

Money remitted to the SYNOD designated for CLWR or money sent directly to CLWR.

- **11h. Other benevolence including ELW**

Include here all disbursements not noted above given to causes/agencies not affiliated with the ELCIC.

- **11i. Total disbursements**

Total of 11a-h. This amount equals all disbursements for the year. NOTE: This is a total of **ALL** disbursements not just of the benevolence categories.

12. Assets as of December 31, 2007

Show real estate assets in terms of insurable **replacement** value on buildings and market value of land to nearest one hundred dollars (\$100). **THESE VALUES SHOULD BE REVIEWED ANNUALLY.**

- **12a. Church buildings and land**

Include the value of the church building(s) and educational unit, whether they are attached or not.

- **12b. Church furnishings and equipment**

Include the value of all furnishings and equipment relating to the buildings reported in a above.

- **12c. Parsonage(s) and land**

If owned by more than one congregation, indicate the proper proportionate value on the report of each congregation involved and write "shared" before the dollar value.

- **12d. Other real estate**

Real estate not included in 12a or c above. The valuation of property should be on a replacement basis.

- **12e. Endowment and memorial funds**

Endowment consists of securities, or cash held in trust by the church council. Securities should be stated at their market value as of the end of the year. To these amounts the cash in the endowment fund as of the end of the year is to be added. Only principal funds expressly for endowment of the congregation or of some phase of its program are to be reported here.

- **12f. Cash, savings, bonds, etc**

Include cash on hand from the regular operation account. Also include funds being held for improvements, new buildings, new equipment, etc. which were raised in cash and are in hand but not yet expended. Include securities and investments other than for endowment. Securities should be stated at their market value as of the end of the year. Include a bank overdraft here as a negative number.

- **12g. Other assets**

Include any other assets not reported elsewhere.

- **12h. Total assets**

Total of 12a-g. This figure should match the total assets from the congregation's balance sheet for the yearend.

13. Total indebtedness as of December 31, 2007

Include all financial obligations for which the congregation is liable, e.g., all mortgages, loans, notes, liens, unpaid/overdue taxes and interest and unpaid bills as of the end of the year. This figure should match the total liabilities from the congregation's balance sheet for the yearend.

14. Bequests received during 2007

NOTE: A bequest is a gift received from a deceased person through his/her will. *Memorial gifts are not bequests –please include them in 10b.*

- **14a. Number of bequests received**

Indicate the **NUMBER** of individual bequests received. *Include only those where the transfer of the gift was completed in the year.* Estimate if necessary.

- **14b. Total value of bequests received**

Indicate the total *received* **VALUE** of bequests

received in year.

Bible Study, Discussion Groups, Learning Groups, Support Groups, etc.

FORM A3 – INFORMATION ABOUT YOUR CONGREGATION’S PROGRAMMING

PROGRAM CATEGORIES

• Sunday Church School

Your congregation's main educational program for all ages no matter what day of the week the classes are held. Sunday church school records are usually based on a September to June program year rather than the calendar year. Use the enrollment and attendance records of the September through December quarter of the present program year.

• Vacation Bible School (VBS)

Educational and fellowship activities for all ages held during the summer months. If you participate in an ecumenical or co-operative church school then record only the number of leaders and pupils from your congregation.

• Weekday

Educational and fellowship programs for all ages that are supplemental to the main educational program. If your Sunday School meets on weekday in place of Sunday, please use the Sunday column to report participation.

• Confirmation

Educational and fellowship programs that are part of a program of preparation for affirmation of baptism or confirmation.

• Other

Report other educational and fellowship activities sponsored by the congregation that does not fit into any of the previous categories.

LEADERS

For each program category - Sunday School, Vacation Bible School, Weekday, Confirmation and Other – record the number of people participating as leaders. You can count all people who played a significant role in leading or organizing the educational or fellowship activity.

PUPILS

Report enrollment for each age grouping on the form.

• Nursery to Grade 12

Please do not lump groupings together even if your church school uses different class groupings. Estimate if necessary.

•Adults

Adult Education is an important part of the life of a congregation. Please report all forms of education -

CURRICULUM USED

List the primary materials used in your congregation's program. Include as much detail as practical. This may include the title, author(s), publisher and/or source. Indicate which class groupings and program used the material.

Examples:

- Living in Grace, Augsburg Fortress Confirmation, Year 1-3
- Good News Explorers, Augsburg Fortress Sunday Nursery - VI
- Invitation to Discipleship, Martin E. Marty, Adult Weekday

SUBMISSION OF FORMS

Deadline for submission is **February 29, 2008**.

Once you have reviewed and checked the information recorded on your congregational report worksheets for accuracy, the information should be submitted online at the ELCIC website. On the home page at www.elcic.ca, under the 'Resources' tab, choose "Parochial Reports" to access the online reporting link.

To guide you through the online process, please see the attachment "Instructions for Completing the Online Parochial Reports". You will also need the online password and user name provided on Form A0.

You will be able to save your work and go back to it later. Remember to print out a copy for your records. Although several people may fill out the different worksheet forms, we would ask that one person be responsible for entering all the information online and submitting it to the national office.

