

Administrative Board

September 17, 2017



Call to Order

**Nancy Northington
Administrative Board Chair**





Approve Minutes



Senior Pastor Report

Rev. Paul Purdue



Ministry Focus: Spiritual Assessment Report

Starr & Jim Strickland

Louis Jordan

Rev. Heather Harriss

Rev. Jefferson Furtado

Adult Spiritual Assessment

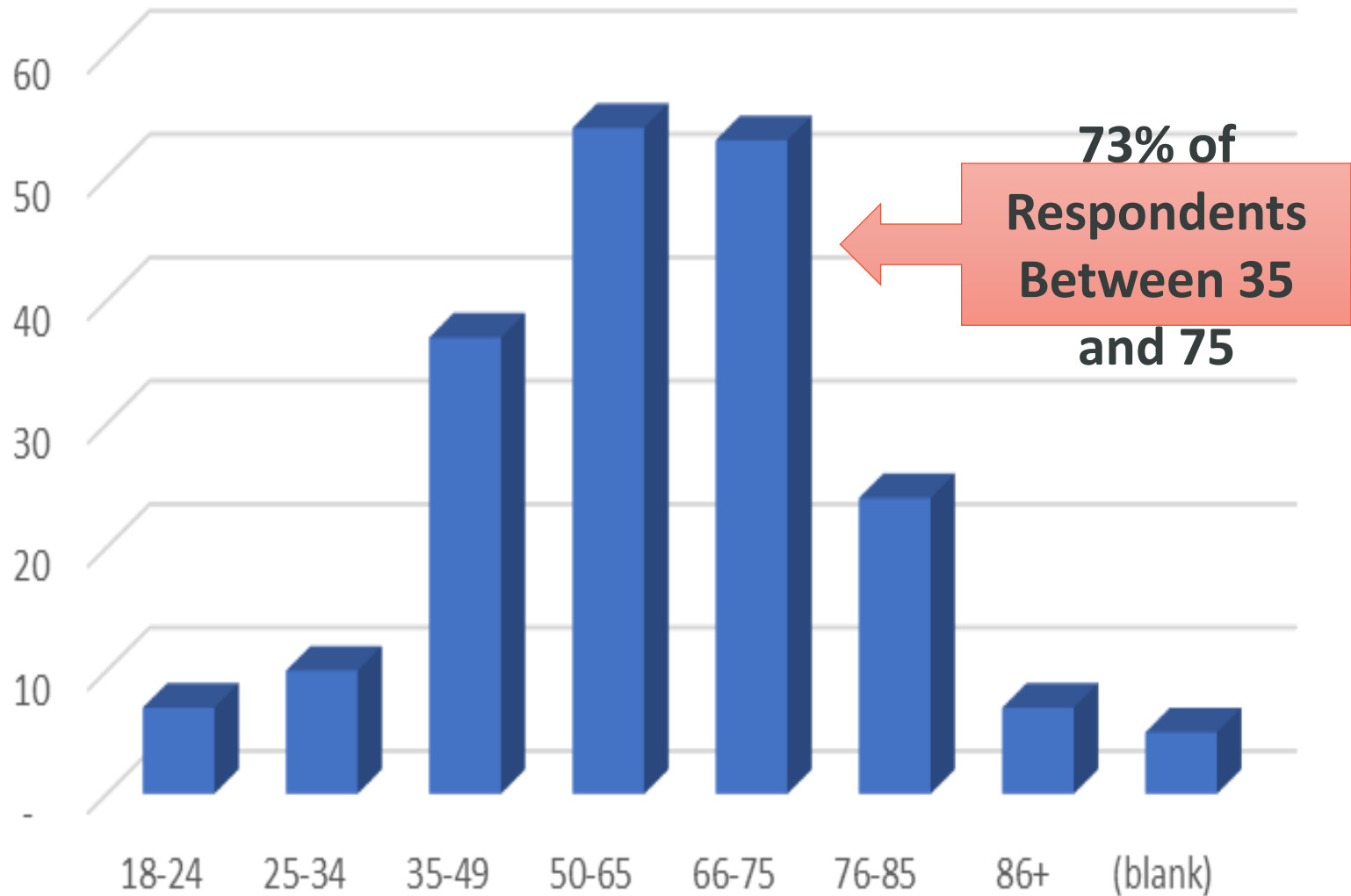
BELMONT UNITED METHODIST CHURCH
SPRING 2017

Adult Spiritual Assessment of BUMC

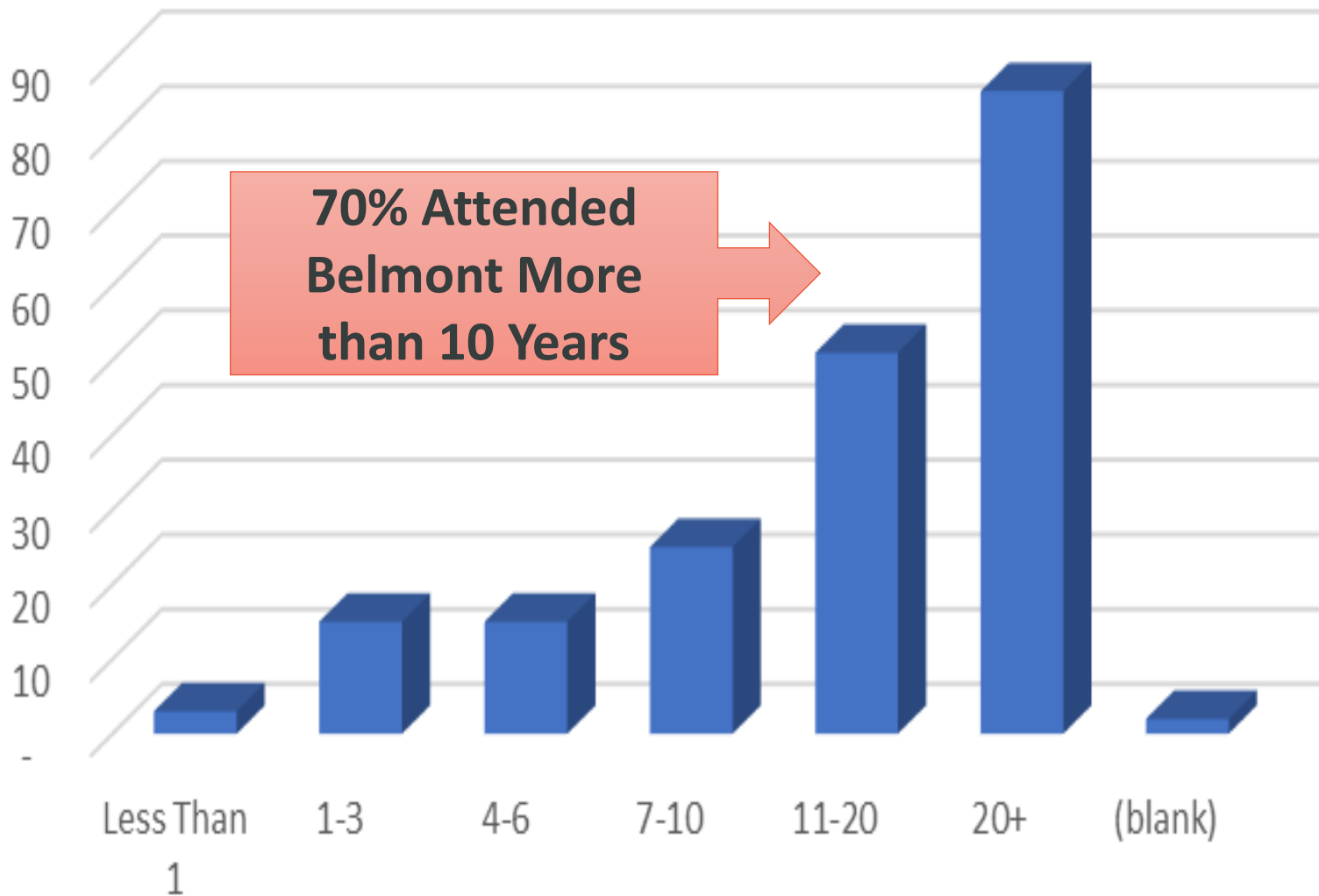
- Origin – Desire to better understand spiritual needs and life of senior adults
- Project Team:
 - Jim and Starr Strickland, Co-Chairs of Senior Adult Ministry Council
 - Heather Harriss, Staff Liaison with Senior Adult Ministries
 - Jefferson Furtado, Minister of Discipleship
 - Dr. Rick Gentzler, Consultant from Encore Ministries with Older Adults in the TN Conference
 - Louis Jordan, Chair of Inviting Ministry
- Scope expanded to include all adults
- Assessment designed (Jan-March) Ten questions; combination of quantitative and open-ended responses.
- Responses received April 23 – May 7 electronically through Survey Monkey and in Iris Room on Sunday mornings
- 197 persons responded (approximately 30% of active Belmonters)

Project was funded by a grant from the Belmont UMC Trust Fund

Respondents by Age Group

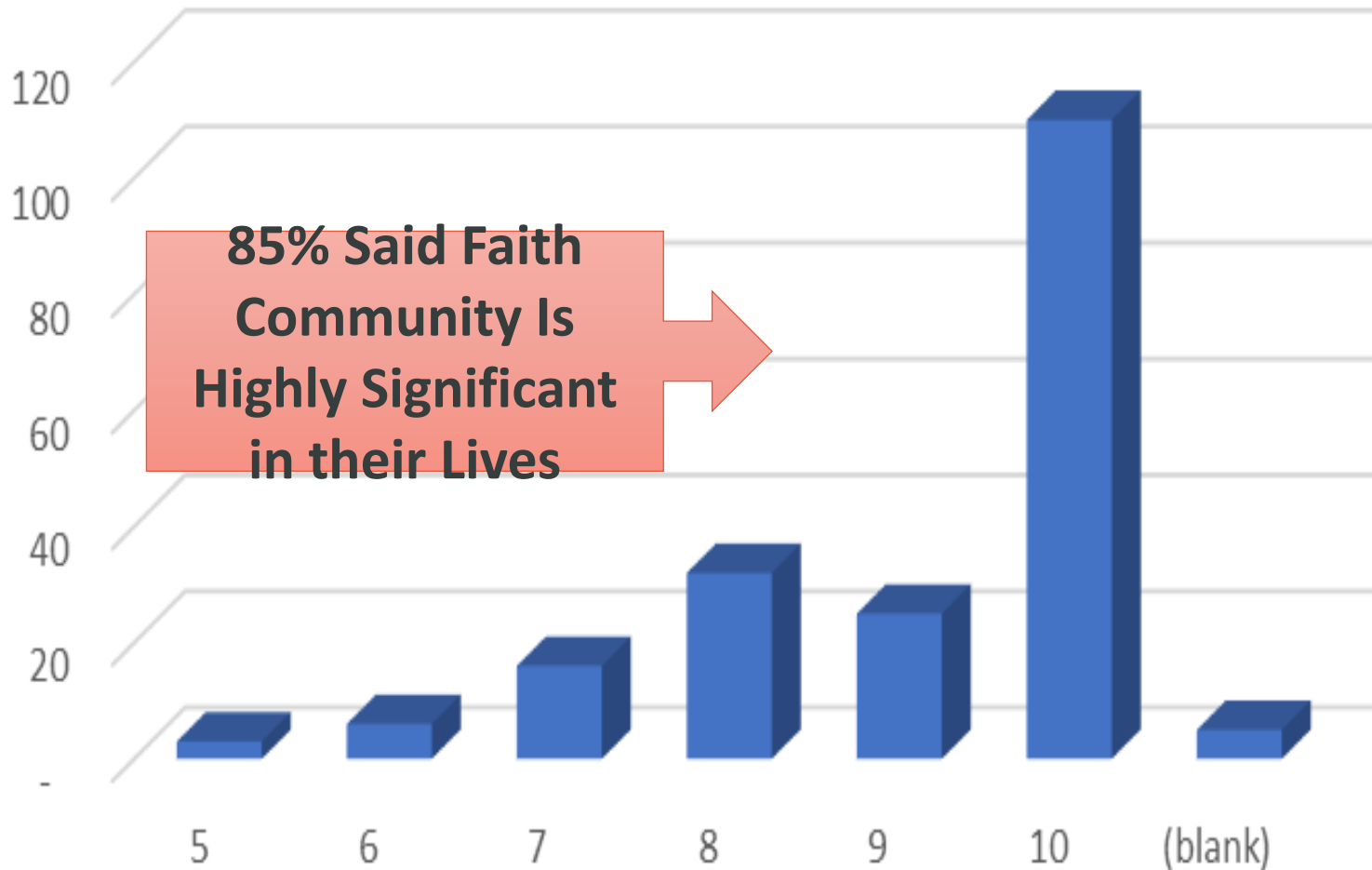


Years Attending Belmont



How Important is Your Faith Community

(Scale 1-10)



Participation Summary

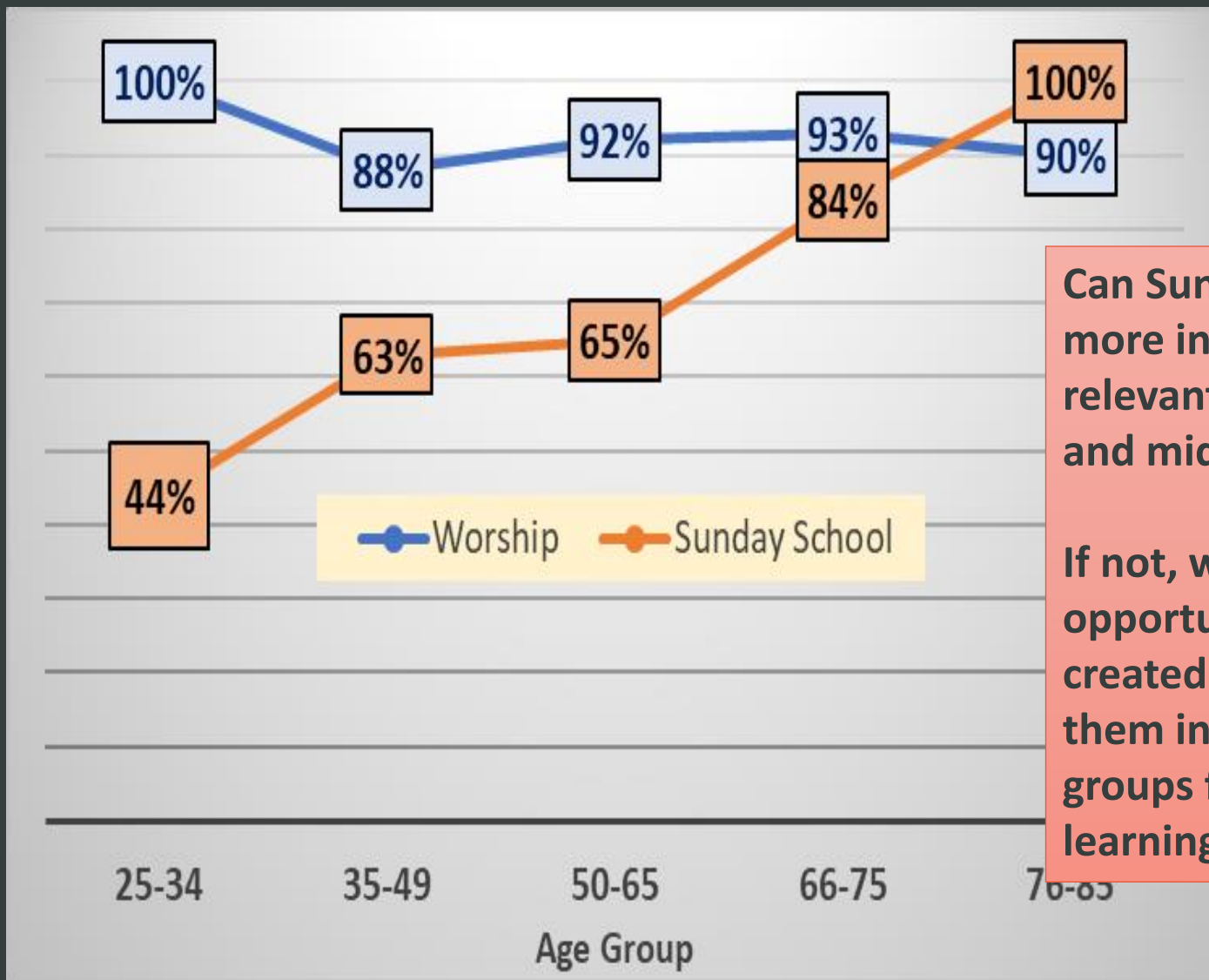
- Middle and Senior Adults (35-75) well represented and statistically valid.
- Data for Young Adults (<34) and Older Adults (>75) less substantial, but still provides good insights.
- Respondents are very active Belmonters who consider their religious life and church to be very important to them.
- Overall, Assessment provides a good perspective on the spiritual lives of Belmont adults.

Results – Lots of Data!

- Over 10,000 data points to review and analyze.
- Over 600 comments and open-ended responses.
- Created spreadsheet where responses can be filtered by demographics.
 - Spreadsheet only contains demographic data; no names or personal identification.
- Assessment team willing to assist groups to review results and spreadsheet.



My Faith is Enriched By:



Can Sunday School be more interesting and relevant to younger and middle adults?

If not, what other opportunities can be created to involve them in ongoing groups for support and learning?

Top Five Interests

All Responses	Members 20+ Years	New Members (<10 Years)
1. All Church Events	1. All Church Events	1. Bible Study
2. Bible Study	2. Bible Study	2. Small Group Studies
3. Social Action/ Advocacy	3. Social Action/ Advocacy	3. All Church Events
4. Lunch/Dinner Social Groups	4. Small Group Studies	4. Lunch/Dinner Social Groups
5. Small Group Studies	5. Lunch/Dinner Social Groups	5. Social Action/ Advocacy

1. Both long term and newer members share the same interests.
2. Strong desire for more fellowship and to get to know each other better.
3. Learning and study are key interests for everyone, especially newer members.
4. Social action and advocacy are a key component of our church culture.

Outside Faith Enrichment / Sources of Strength

Open Ended Questions

- Two predominant common responses to both questions from 20%-25% of respondents:
 - **Personal prayer and meditation**
 - **Family and friends**

Opportunities?

- Provide more resources for individual prayer and study.
- Offer guidance on developing richer personal spiritual disciplines.
- Enable families to have stronger relationships.
- Create an environment where strong friendships can flourish and deepen.

Overall Themes / Key Learnings

1. Desire to get to know each other better – neighborhood groups, intergenerational activities, fellowship opportunities, all church events.
2. Strong interest in Small Study Groups and Bible Study.
3. People are willing and interested in serving. Social justice and advocacy are very important to most Belmonsters.
4. Desire for more spirituality – retreats, small group studies, personal meditation.
5. Need to connect others through groups other than Sunday School.
6. Cohesive communication is essential to keep us informed about all that is happening.
7. Overall, respondents felt strongly that Belmont is supporting their spiritual needs.

Assessment Outcomes and Impact

- Share results in newsletter articles, Administrative Board, and Ministry Council.
- People who expressed an interest in service opportunities have been contacted:
 - Praying for others, Visiting the sick and homebound, Writing cards
 - New people involved in congregational care ministries
 - Hospital visitation team is being formed.
 - Children's ministries.
- Publicizing more existing ministries and small groups that foster spiritual growth and provide fellowship:

The Women's Centering Prayer Group	Second Thursday Book Group
Wednesday Night Book Group	Praying through Scripture
Attending to God's Word	Covenant Bible Study

- Creating Connect Groups and encouraging people to join.



Ecclesiastical Sanctuary Update

Mike Engle

Finance Report

John Pearce



BUMC Admin Board

September 17, 2017

- Finance Report
 - Year To Date Operating Fund Results
 - 2017 Year End Challenges
 - 2018 Operating Fund Budget
 - 2018 Operating Fund Campaign

YTD Operating Fund Results

- July 31 Pledge & Loose (26,546)
 - PY (125,039)
- WDS YTD + 19,401
- GTCOW = \$30,980.18 Budget = \$40,000
- Capital Fund Transfers \$50,000
- Trust Fund Transfer \$50,000

Trust Fund 2017

1/1/16 Balance	\$3,005,806
Gifts	76,550
Debt Service	(60,000)
Transfer to Operating	(50,000)
Grant Payments	(98,720)
Earnings	173,781
Pre 2017 Grants	(24,682)
6/30/17 Balance	\$3,022,735
Earned	11.6 %

Week Day School Fund July 31, 2017

WEEK DAY SCHOOL FUND

- \$847,331 Revenue Budget 2017
- \$847,331 Expense Budget 2017
- \$0 Net Income Budget 2017
- Reimburse BUMC \$24,000 in 2017
- Year To Date Revenue Exceeds Expenses by:
\$19,401

2017 Year End Challenges

- Collect \$488,285 of pledges
- Christmas Miracle Offering
- GTCOW \$10K shortfall
- Loose Offering needs \$70,240
- Expenses:
 - Properties \$180K budget \$205K PY capital transfer
 - Staff heading towards 100% of budget
 - Program Ministry Budget 8% less than PY actual
 - Apportionments Owe \$153,141

2018 Operating Fund Budget

- **2012 – 2018 Trend Expenses**
 - Staff \$833,183 - \$963,900 UP \$130,717
 - Admin \$20,609 - \$24,480 UP \$3,871
 - Properties \$190,610 - \$234,600 UP \$43,990
 - (Capital Fund Transfer of approx. \$40,000)
 - Ministry Council \$131,177 - \$130,945 Down \$232
 - Apportionments \$256,399 - \$280,852 UP \$24,453
 - Apportionments = 23.7% of local church expenses
 - **TOTAL EXPENSE INCREASES \$202,799**

2018 Operating Fund Budget

- 2012 – 2017 Trend Income
 - Pledges \$1,177,220 - \$1,234,205 UP \$56,985
 - Trust Fund Transfer \$0 - \$50,000 UP \$50,000
 - Capital Fund help with Properties Various
 - Other Revenue \$281,179 - \$292,804 UP \$11,625
- Total Income UP \$118,610

2018 Operating Fund Budget

- Expenses UP (2018) \$202,799
- Income UP (2017) \$118,610

- Difference \$84,189
- 2018 2% Expense increase \$28,478
- Appor. increase @ 100% \$55,711

2018 Operating Fund Budget

- To Balance 2018 vs. 2017:
 - Expenses increase \$28,478
 - Apportionments 100% \$55,711
 - Trust Fund One Time Gift \$50,000
 - Capital Fund Reduction \$25,000
 - **TOTAL NEED**
\$159,189

2018 Operating Fund Budget

- Need \$159,189
- 5% Additional Pledges 61,710
- Staff Parish 55,000
- Ministry Council 15,000
- Properties 10,000
- Short Pay appor. 17,479

2018 Operating Fund Campaign

- Small Group: Paul Purdue, Nancy Northington, Gary Hines, Susan Fagan, John Pearce
- Messaging Team
- Use of Narrative Budget to tell the ministry stories vs. just numbers
- Small group “family meetings” to discuss giving
- Public campaign late October/November
- Trying to reach more people

SunTrust Term Debt

- Closed November 13, 2012
- \$3,100,000 Amount
- Rate 3.4% Fixed
- Interest only through 12/31/12
- 20 year amortization begins 1/1/13
- **Matures November 1, 2017 (5 Years)**
- Payment required \$213,828/year
- \$120,000 / year from Trust Fund
- \$100,000 +/- year from Rental Property

BUMC Apportionment History

Year	Paid	Percentage	Short
• 2004	220,521	• 100%	0
• 2005	240,956	• 100 %	0
• 2006	250,985	• 100%	0
• 2007	259,744	• 100%	0
• 2008	259,316	• 100%	0
• 2009	258,069	• 96.7%	8,891
• 2010	240,600	• 94.7%	13,465
• 2011	247,876	• 95.7%	11,272
• 2012	256,399	• 100%	0
• 2013	254,789	• 100%	0
• 2014	246,797	• 100%	0
• 2015	228,685	• 100%	0
• 2016	199,565	• 81.8%	44,323
• TOTAL	3,164,302	• 97.60%	77,951

Belmont UMC Annual Campaign Cycle

- | | |
|----------|---|
| August | Gifts that Change the World - \$50,000 For Conference askings |
| October | Operating Fund Annual Giving Campaign |
| December | Christmas Miracle Offering (\$25K - \$30K) |
| December | Finish Year Strong Campaign |

Closing

- **2017 Meeting Dates**

- Board Meeting: Sunday, Nov 19, 11:30 am – Community Center
- Charge Conference: Monday, December 11, 7:00 pm – Community Center

- **2018 Meeting Dates**

- January 28
- March 4
- May 6
- July 15
- Sept 16
- Charge Conference - TBD

