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INTRODUCTION AND GENERAL CONFERENCE CHANGES/FORM UPDATES

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Topics to Discuss



- Is my Annual Conference syncing data to GCFA?
- Updates to Forms
- Changes Following General Conference
- Candidacy Changes
- Certificates
- Reinstatements
- Newly added Data Integrity reporting

Is My Conference Syncing Data to GCFA? =



- Conference syncing data with GCFA



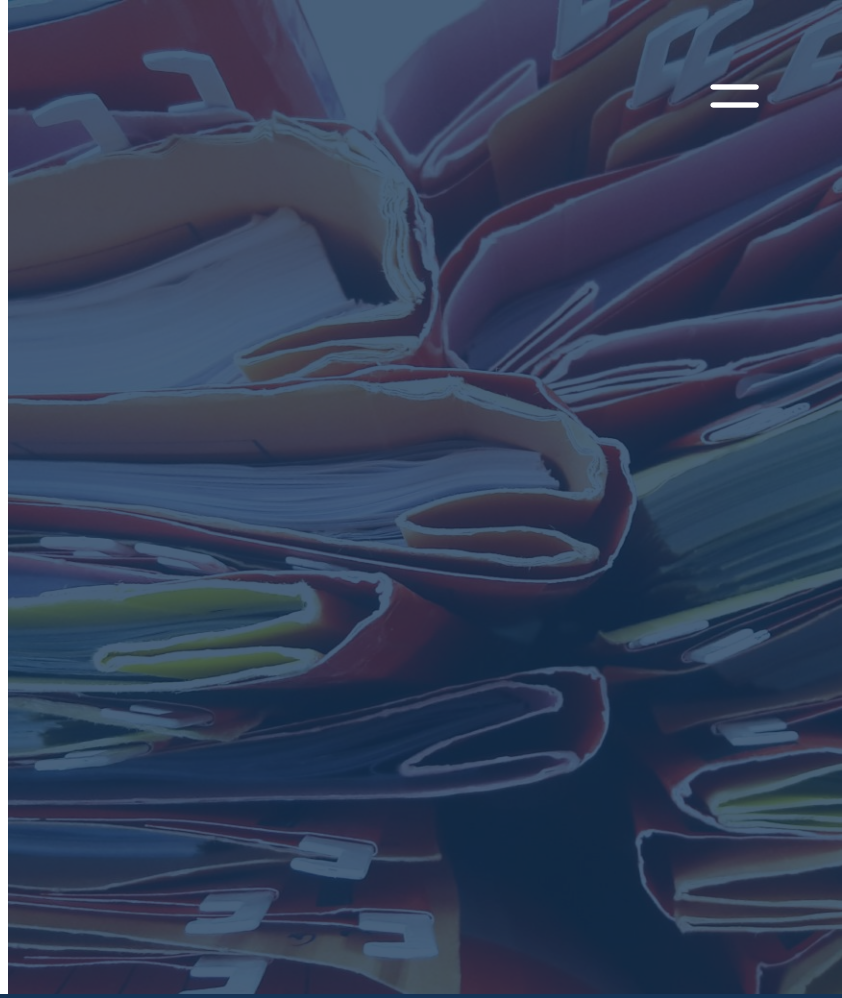
- Some are sending electronic files
- Not an electronic process
- This is still manual effort.

Updates to Forms

Updates to all forms produced by GCFA

Focus groups to help with form revision and upcoming trainings

- BAC - BOM
- Charge Conference - looking for volunteers
- Interims/Certs - Episcopal Services
- Supporting Tables and Conference Requirements - GBHEM, UMCom, GBGM, GCORR, GBDM



GCFA Forms



What Forms does GCFA produce?

- Charge Conference Forms (with help from conferences)
- Certificates
- Annual Conference Forms

Interims → Change in alignment → Request for GCNO

- Business of Annual Conference (BAC) Form (GCFA, WesPath and HigherED)
- Statistics Form

Charge Conference **Forms**



- Annual Report of the Deacon
- Annual Finance Committee Report
- Appointment to Ext. Ministry
- Fund Balance Report
- Report of the Pastor
- Trustees Report

These forms are listed on GCFA.org and in Chronicles for churches and conferences users

Types Of Certificates

Produced By GCFA

- Associate Member
- Candidacy Cert Renewal Table
- Candidacy for Ordained Ministry
- Certificate of Appreciation
- Certificate of Charter
- Certified Lay Minister
- Member in Full Connection
- Member of Order of Deacon

- Order of Elder
- Pastoral Ministry
- Practice of Ministry of Deacon
- Provisional Member
- Recertification Table
- Recognition of Order
- Renewal of License Table
- Replacement Certificate (back side)
- Honorable Location

Annual Conference Forms



- Appointment from Another Annual Conference
- Interim Change of Appointment
- Transfer and Appointment
- Alignment\Realignment - Treasurer's
- Request for new GCFA Number -Districts - Treasurer's

Request For New GCFA Number



Request for New Church Number (GCNO)

| | |
|--|--|
| Today's Date: _____ | GCNO (GCFA will Assign #) |
| | Annual Conference: _____ |
| | District: _____ |
| General Church Information: | |
| Church Short Name: _____ | |
| Church Full/Legal Name: _____ | |
| Conference Local Number: _____ | Church Type: _____ (Chartered, New Church Start, Satellite, Mission) |
| Charge: _____ (If charge name is different from church name) | |
| Parent Church: _____ (Required for all Satellite Churches) | |
| FOUNDED Effective Date: _____ (GCFA needs this for New Church starts) | |
| Organized/Chartered Effective Date: _____ | Church Fax: _____ |
| Mailing Address: _____ | Church Email: _____ |
| _____ | Church Website: _____ |
| Physical Address: _____ | EIN: _____ |
| _____ | Church Ethnic: _____ 0= White, 1=Asian, 2=Black, 3=Hispanic, 4=Native Am, 5=Pacific Islander, 6=Multi Racial, 7=Other |
| Church Phone: _____ | Church Spoken Language (s): _____ 01=English, 02=Spanish, 03=Russian, 04=French, 05=Kiswahili, 06=Korean, 07=Portuguese, 08=German, 09=ASL |

Send copy to: Data Services Department, GCFA, dataservices@gcfa.org or PO Box 340029, Nashville, TN 37203-0029

This form is used to notify GCFA of a new church\entity in your conference and obtain a new GCFA number when needed.

Request For New GCFA Number



You can now obtain a new GCFA number for the following types:

- Churches (chartered, NCS, Satellite & Mission)
- Camps
- Education
- Health Services
- Military
- Other

Important information to always list:

- Name and type of new entity
- District
- Name of Charge (if not a stand-alone church)
- Ethnic if know
- Parent information if Satellite
- Founded\Organized\Charter Date
- Mailing/Physical address

More Forms, Really...

Now with all these forms
let us not forgot the BAC
and Stats forms

PLEASE NOTE: The tables provided in all questions (except Q.52) are suggested formats for reporting

THE UNITED METHODIST CHURCH THE BUSINESS OF THE ANNUAL CONFERENCE

The Minutes of the Annual Conference
Held in
From (date) through
Bishop Presiding
Date When Organized Number of This Session

PART I ORGANIZATION AND GENERAL BUSINESS

1. Who are elected for the quadrennium (§603.7, 619)

Secretary

Mailing Address:
Telephone:
Email:

Statistician

Mailing Address:
Telephone:
Email:

Treasurer

Mailing Address:
Telephone:
Email:

Communicator

Mailing Address:
Telephone:
Email:

2. Is the Annual Conference incorporated (§603.1)

3. Bonding and auditing:

What officers handling funds of the conference have been bonded, and in what amounts (§618, 2511)

| Name | Position | Amount Bonded |
|------|----------|---------------|
| | | |
| | | |

Have the books of said officers or persons been audited (§617, 2511) ____ (See report, page ____ of Journal.)

4. What agencies have been appointed or elected

a) Who have been elected chairpersons for the mandated structures listed

| Structure | Chairperson | Mailing Address | Phone Number | Email |
|--|-------------|-----------------|--------------|-------|
| Conference Council on Finance and Administration (§611) | | | | |
| Conference Board of Ordained Ministry (§635) | | | | |
| Conference Board of Pensions (§639) | | | | |
| Board of Trustees of the Annual Conference (§640, §2512) | | | | |



UMC Local Church Report for 2017-2020 Quadrennium Published by the General Council on Finance and Administration

| | | | | | |
|--------------|--|--|--|--|-----------------------------|
| Church Name: | | | | | |
| Charge: | | GCFA Church #: | | | |
| District: | | Conf. Church #: | | | |
| Pastor: | | Federal Tax ID #: | | | |
| Church Type: | Chartered Church <input type="checkbox"/> | Mission Church <input type="checkbox"/> | New Church Start <input type="checkbox"/> | Satellite Church <input type="checkbox"/> | Parent Church of Satellite: |

| | |
|-------|--|
| NOTES | |
|-------|--|

TABLE 1: MEMBERSHIP & PARTICIPATION

| | 1 | Total professing members reported at the close of last year Enter here the total membership reported in last year's Local Church Report. Do not use this line to correct the previous year's report. This line should be provided by the annual conference statistician. | 1 |
|-----------------|----|---|------|
| MEMBERSHIP ROLL | 2a | Received this year by Profession of Faith through confirmation | + 2a |
| | 2b | Received this year by Profession of Faith other than through confirmation | + 2b |
| | 2c | Membership restored by Affirmation of Faith | + 2c |
| | 2d | Added by Correction | + 2d |
| | 2e | Transferred in from another United Methodist Church | + 2e |
| | 2f | Transferred in from a non-United Methodist Church | + 2f |
| | 2g | Received from closed United Methodist Churches | + 2g |
| | 3a | Removed by Charge Conference Action | - 3a |
| | 3b | Withdrawn from Professing Membership | - 3b |
| | 3c | Removed by Correction | - 3c |
| | 3d | Transferred out to another United Methodist Church | - 3d |
| | 3e | Transferred out to a non-United Methodist Church | - 3e |
| | 3f | Deceased | - 3f |
| | 4 | Total Professing Members at the close of this year Enter here the figure reported from calculating 1 + (2a+2b+2c+2d+2e+2f) - (3a+3b+3c+3d+3e+3f) = 4. Affiliate, associate, and baptized members (who have not yet become professing members) should not be counted as professing members. | = 4 |

UMC Clergy / Laity Statues

| | | | |
|-----------|--|-----------|---|
| AF | Affiliate Member (§§, 337.1344.3b, 586.4d) | OF | Full Member of other denomination (§ 346.2) |
| AL | Administrative Location (§ 360) | OL | Local Pastors on Loan (§ 318.4) |
| AM | Associate Member (§§ 322, 370.1, 634.2h) | OM | Other Methodist (§346.1) |
| CC | Certified Candidate (§§ 310,311) | OP | Provisional member of other Annual Conference (§ 346.1) |
| DC | Deaconess (§ 1913.2) | OR | Retired member of other Annual Conference |
| DM | Diaconal Minister (2004 Discipline § 369.1) | PD | Provisional Deacon (§§ 324, 325,326) |
| DR | Retired Diaconal Minister (<i>consecrated under provisions of 1992 or earlier Discipline</i>) (§ 357) | PE | Provisional Elder (§§ 324, 325,326) |
| FD | Deacon in full connection (§ 330) | PL | Part time Local Pastor (§ 318.2) |
| FE | Elder in full connection (§ 335) | RA | Retired Associate Member (§ 358) |
| FL | Full time Local Pastor (§ 318.1) | | |
| HL | Honorable Location\Honorable Location Retired (§§ 359.1, 359.3) | | |
| HM | Home Missioner (§ 1913.2) | RD | Retired Deacon in Full connection (§ 358) |
| LM | Certified Lay Minister (§ 268) | RE | Retired Full Elder (§ 358) |
| OA | Associate Member of other Annual Conference (§ 346.1) | RL | Retired Local Pastor (§§ 320.5, 327.7) |
| OD | Deacon member of other Annual Conference (§ 331) | RP | Retired Provisional Member (§ 357) (prior to Jan 1, 2013) |
| OE | Elder member of other Annual Conference | | |

Not a Disciplinary Code: **SY** - Other Supplies – Used by GCFA for assigned pastors

Changes Following General Conference



Changes From General Conference

- Ethnicity codes - will work with GCORR to add other ethnicities to the listing
- Leave - adding Formational and Spiritual Growth Leave (different from Sabbatical Leave) to BAC
- Voluntary/Involuntary/Mixed Status Changes
- Voting requirement changes
 - ¶ 314.1 – voting threshold of $\frac{3}{4}$ majority for discontinuing candidates
 - ¶ 314.2 – voting threshold of $\frac{3}{4}$ majority for reinstating discontinued candidates
 - ¶ 315 – voting threshold of $\frac{3}{4}$ majority of the BOM and clergy session for licensing of LPs

Changes From General Conference

- BOD Codes
- On loan LP's
 - How will your conference handle this
 - We will be adding another question to the BAC for this
- Human sexuality language revisions were immediate. Everything else becomes effective on **January 1, 2025.**

Candidacy Changes

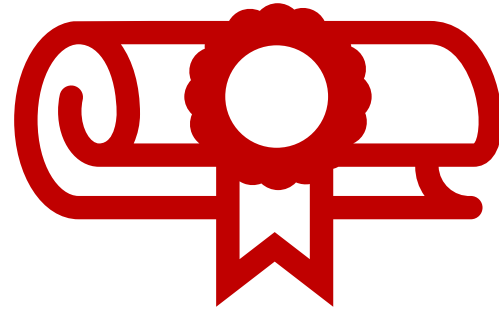
Working with GBHEM with getting people IDs

- Can take COS courses while not under appointment
- ¶ **320.5** - Candidate 72 yr or older can enter (or continue) the process to pursue Retired LP status



Certificates

- Between Annual Conference sessions, Local Pastors (LPs) may be granted a license before the clergy session approves.
- ¶ **361.1-2** – Associate Ministers (AMs) can withdraw but they need to surrender their certificate of membership.



Reinstatements

¶ 314 – Discontinued Certified Candidates can be reinstated by a dCOM other than the one that discontinued them.

¶ 320.4 - Discontinued Licensed Local Pastors (LLPs) can be reinstated but have to show evidence they've been members of a local UM church since their discontinuance.

¶ 327.6 – Provisional members being discontinued can request a fair process hearing but have to request it to the Committee on Conference Relations at least 45 days before Annual Conference.

¶ 365 - Provisional Members discontinued in one Annual Conference can be appointed in another. The Board of Ordained Ministry (BOM) of the appointing Annual Conference SHALL obtain verification of qualification and information about why the Provisional Member was discontinued.

Newly Added Data Integrity Reporting =

Within Chronicles, we have added Data Integrity Reporting to identify the following issues:

- Active Church with no mailing address – for Wespath
- Closed churches with Appointments
- Inactive People with current appointments/assignments
- People with multiple status appointments
- Duplicate church appointments
- Appointment position is invalid

...and more!



Thank You!



615-329-2393



Dataservices@gcfa.org



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www.GCFA.org



FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH



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