



NEW TREASURER TRAINING

Data Services

Topics to **Discuss**



- **Team Introduction**
- **Data Services - Records Focus**
- **Statistics**
- **Forms**
- **Training**

Introductions



Sharon Asmus, Chief Information Officer

Brandy Bivens, Chief of Communications and Marketing

<OPEN>, Director, Data Services

Leslie Ohrin, Manager, Data Services and IT Projects

LaTarsha Sanchez, Data Management Specialist

Alee Yang, Data Management Specialist

Adam Shelton, Data Entry Analyst

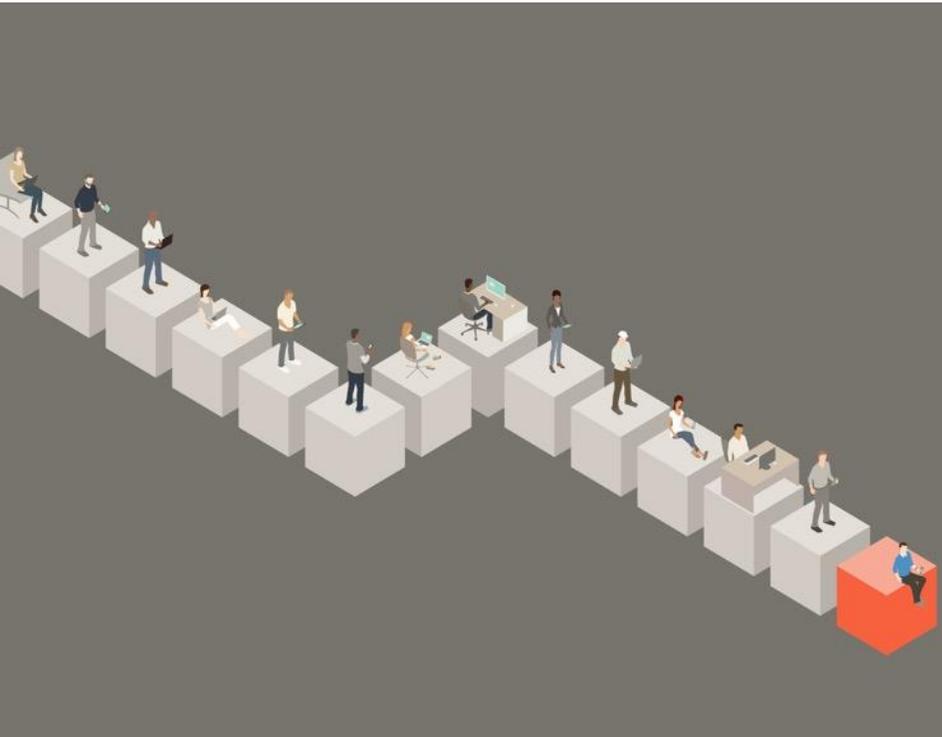
Sandeep Kuntam, Data Analyst



Data Services

20,796.00	3,445.00	34,570.00	345.00	234,768.00	42,343.00	342.00	336
2,315.00	45,534.00	7,566.00	42,456.00	234,234.00	5,564.00	23,442.00	361
38,484.00	38,484.00	38,484.00	5,345.00	634,567.00	234,676.00	46,456.00	1,036
16,164.00	16,164.00	16,164.00	16,164.00	10,776.00	234,423.00	4,234,467.00	4,544
15,726.00	15,256.00	33,245.00	3,423.00	34,423.00	42,234.00	34,233.00	178
2,276.00	25,412.00	54,322.00	2,342.00	23,423.00	34,554.00	564,523.00	1,334
18,174.00	3,654.00	23,312.00	3,423.00	23,423.00	34,554.00	246,723.00	353
55,320.00	55,320.00	9,220.00	234,423.00	234,233.00	45,344.00	24,423.00	658
31,428.00	31,428.00	31,428.00	31,428.00	534,457.00	45,573.00	442,344.00	4,148
14,772.00	14,772.00	14,772.00	14,772.00	14,772.00	14,772.00	40,334.00	228
16,392.00	16,392.00	16,392.00	16,392.00	16,392.00	16,392.00	4,744.00	218
15,168.00	15,168.00	15,168.00	15,168.00	15,168.00	15,168.00	996.00	238
58,680.00	58,680.00	58,680.00	58,680.00	58,680.00	58,680.00	4,100.00	798
13,704.00	13,704.00	13,704.00	13,704.00	13,704.00	13,704.00	662.00	158
15,924.00	15,924.00	15,924.00	15,924.00	15,924.00	15,924.00	3,465.00	488
51,000.00	51,000.00	51,000.00	51,000.00	51,000.00	51,000.00	1,700.00	1,478
46,884.00	46,884.00	46,884.00	46,884.00	46,884.00	46,884.00	1,448.00	1,318
37,872.00	37,872.00	37,872.00	37,872.00	37,872.00	37,872.00	3,184.00	1,068
480,091.00	512,603.00	550,009.00	3,955,000.00	2,580,255.00	1,835,094.00	88,520.00	22,840.00

Data Services – Area Of Focus



Official Data Forms

- Business of Annual Conference (BAC)
- Local Church & Annual Conference Statistical Forms (Tables 1, 2 and 3)
- Charge Conference Forms



Collection of official church records

- Church, clergy, appointments and leadership assignments
- US local church and central conferences statistics.



Research

- Research projects
- Provide data for other agencies, committees, and UMC groups



Business Of Annual Conference (BAC)

What Does It Mean To Me?

Business Of Annual Conference



- The BAC is a form that lists important questions about conference leadership, church, and clergy changes that happened during your Annual Conference Session.
- The questions listed on the BAC are a collaboration between GCFA and other UMC agencies for important information that is needed to update official UMC records for churches, clergy, and conference leadership.

BAC & *Book of Discipline*



- The BOD mandates that Official Records of secretaries, statisticians, and treasurers shall be kept according to the forms prepared by the General Council on Finance and Administration (GCFA) so that official statistical and financial items shall be handled alike in all annual conferences.
- The BOD also mandates that all records of candidates, ordained and diaconal ministry personnel maintained by the conference secretary, treasurer or other administrative officer(s) named by the annual conference are kept on behalf of the annual conference in conformity with guidelines provided by GCFA in consultation with GBHEM and Wespath.

¶ 606.8-9

BAC Form



- Questions 1-9 deal with leadership positions in your Conference along with bonding, auditing and apportionment information.
 - Leadership rosters are shared between the general agencies to communicate to annual conferences about programs and resources available to leaders within the connection.
-  Questions 10-12 highlight changes that were made to your church's missions, new church starts, satellite, chartered and ecumenical shared ministries. (organized, continued, merged, discontinued/abandoned, closed, address changes, names, conference moves and alignment/charges).
- Do you need a GCNO? It is needed for the BAC and Statistics.
- Questions 13-75 deal with clergy/lay members of your annual conference.

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)

Church Fax: _____

Organized/Chartered Effective Date: _____

Church Email: _____

Mailing Address: _____

Church Website: _____

EIN: _____

Physical Address: _____

Church Ethnic: _____
0= White, 1=Asian, 2=Black, 3=Hispanic, 4=Native Am, 5=Pacific Islander, 6=Multi Racial, 7=Other

Church Spoken Language (s): _____
01=English, 02=Spanish, 03=Russian, 04=French, 05=Kiswahili, 06=Korean, 07=Portuguese, 08=German, 09=ASL

Church Phone: _____

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:

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



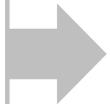
Important information to always list:

- Name and type of new entity
- District
- Name of Charge (if not a stand-alone church)
- Ethnicity, if known
- Parent Information if Satellite
- Founded/Organized/Charter Date
- Mailing/Physical address

Things To Remember



- Once a candidate is appointed as FL or PL, they are no longer listed as a certified candidate (except the first year they are appointed when they would need to be listed in 15 and in 16 or 17). Students appointed as Local Pastors (¶ 318.3) are the only people who are allowed to be listed as a candidate in one conference while being listed as an LP in a different conference. Paragraph 318.3 stipulates that students appointed as local pastors can serve in either a full or part-time capacity



Question 52 clergy counts. These counts are extremely important. Please do not skip this question.

- Candidacy, Ordination, Course of Study, Seminary, Transferring, Readmission, Specialized Ministry, Deceased and Disciplinary Actions information is very important to all agencies and needs to be completed.

2026 Record Dates



- **March 2026** - BAC and BAC Instructions will be sent out to all conferences
- **August 31, 2026** - 2025-2026 Appointments to be received
- **October 1, 2026** - 2025 BAC - we are asking that your BAC is submitted to GCFA by this date.
- *These documents are submitted to GCFA by your conference secretary. If your conference secretary is not the designated person, please let GCFA know.*



Statistics

The Basics: Stats Overview



- **GCFA uses ACStats to report statistics for Jurisdictional Conference**

- Enter information directly into ACStats
- Upload your information

What Treasurers Need to Know

- ¶606.7 – Churches must report by January 30th - no later than thirty days following the close of the calendar year
- Table 1: Membership and Participation
- Table 2: Expenses
- Table 3: Income

The Basics

Definitions of Church Types



Type	Description
Chartered	A chartered local church is a freestanding, fully operational, congregation that has been appointed a pastor, and is expected to give an annual financial and participatory report to its annual conference. Organization of the local church is defined in the BOD ¶ 244. A chartered church is not in “New Church Start” status, nor is it a mission church or attached to another congregation, unless as the parent to a satellite.
New Church Start	A New Church Start is a church that has been established with the consent of the Bishop, but has not yet reached a level of organization to garner it a “chartered” church. A New Church Start may be appointed a pastor or submit statistics, but it is considered new (and given considerations associated with any newcomer) until the conference authorizes its charter. More information can be found in the BOD ¶ 259.2.
Satellite	When authorized by the district superintendent and the district board of church location and building, chartered local churches may sponsor or serve as “parent” to a satellite church. The satellite is often a separate site or campus of a larger local church congregation.
Mission	Congregations are designated as “Missions” when membership opportunities and resources place limits on the church’s abilities to obtain charter status. These churches often are created strategically in order to serve a limited population such as those of a minority demographic or to cater to other cultures or languages. Missions are often funded by sources outside of the congregation and rarely support the UMC connection through apportionments or other income, and the annual conference usually provides long-term administrative guidance of the congregation. The mission congregation may be organized in the same manner of any local church and can have the same rights and powers, as such submitting statistics to GCFA, as decided by the annual conference. The BOD ¶ 259.1a provides further detail.

The Basics: Stats Overview



Church Type	Table 1	Table 2	Table 3
Chartered Church	Required	Required	Required
New Church Start	Required	Optional – excluded from conference apportionments	Optional
Satellite	Only required if information is being reported separate from parent church		
Mission Church	Optional, but recommended	Optional – excluded from conference apportionments	Optional
Ecumenical Shared Ministries	See upcoming slide		

The Basics: Stats Overview



Ecumenical Type	Basic Definition	How to Report Membership
Federated Church	One congregation with at least two denominations. Members choose which denomination holds membership.	If church is holding two membership rolls, only report UMC membership and proportionally split expenses.
Union Church	One congregation with one unified membership roll is related to two denominations.	This is left up to the conference as to whether full membership is included. If so, report as if 100% UMC. If not, do not report.
Merged Church	Two or more congregations from different denominations form one congregation that only relate to one denomination.	If church chooses to relate to UMC, report 100%. If not, do not report.
Yoked Parish	Congregations of different denominations share a pastor.	Only report the churches considered UMC regardless of pastor denomination.

Membership Reporting



- New Church Starts (NCS) and Mission Churches – If they are holding their own membership roll, report membership under the church’s record.
- Satellite churches – Satellite church members may be reported as part of parent church or under the satellite church record. Take great care to avoid double reporting.
- General membership roll – Report any members held on the annual secretary’s general membership roll (¶259.3) under the annual conference record. This is also known as your At-Large Membership.

Online Worship



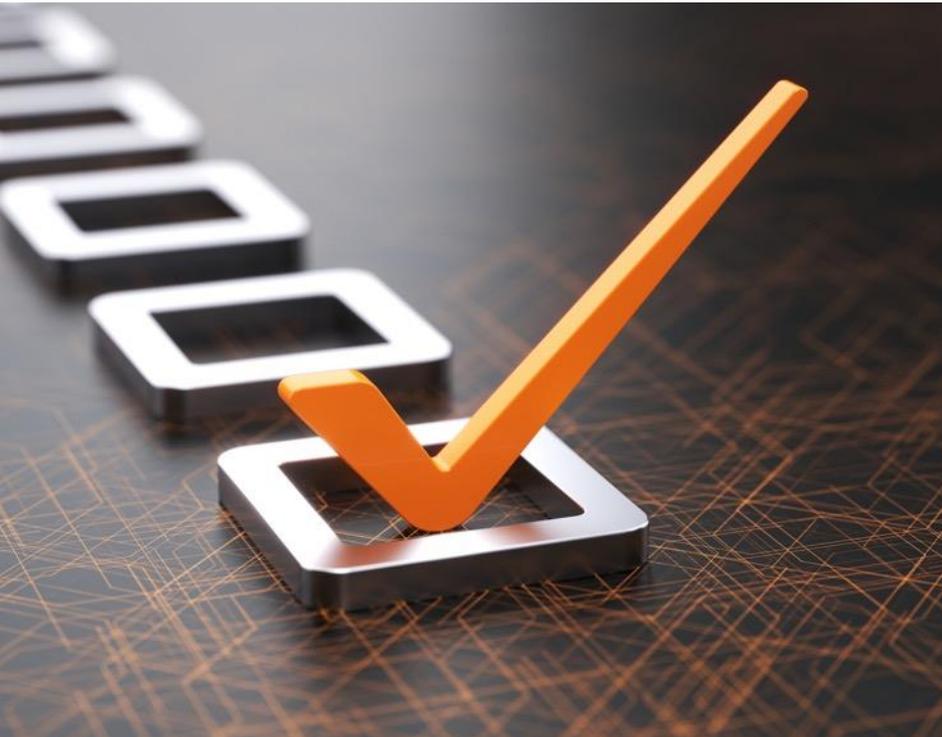
- **Number of persons who worship online:**
Report average weekly number of unique viewers who access worship online. This includes those live streamed online services using various platforms.
- See instructions from the platform to determine streaming your worship service and views/downloads of recorded worship services (audio or video), sermons, and/or podcasts. Do not include generic hits/visits to your website.
- **7: In-Person Worship** - the weeks that you had full in-person service.
- **7a: Online Worship** - many churches count the views/hits/watches based upon viewing time keeping in mind the length of time considered a watch may vary by conference/platform

The Basics



- **Think about your year and your deadlines**
- **Train your staff and churches**
- **Support your staff and churches**
- **Remember WHO is reporting**
 - All active chartered and new church start churches during the reporting year - including churches that closed during the year
 - Mission, satellites are not required
 - Ecumenical churches, it depends

Checking For Accuracy



- Run year-to-year comparisons.
- Check for extra zeros.
- Are totaling lines totaling?
- Is there any double-counting?
- Is all data requested included?
- Check net expense totals!
- Is there any lingering membership?
- How's the Membership/Attendance ratio?
- Are property values reasonable?
- Are debt figures reasonable?
- Do the numbers pass the "gut-check"?

Best Practices



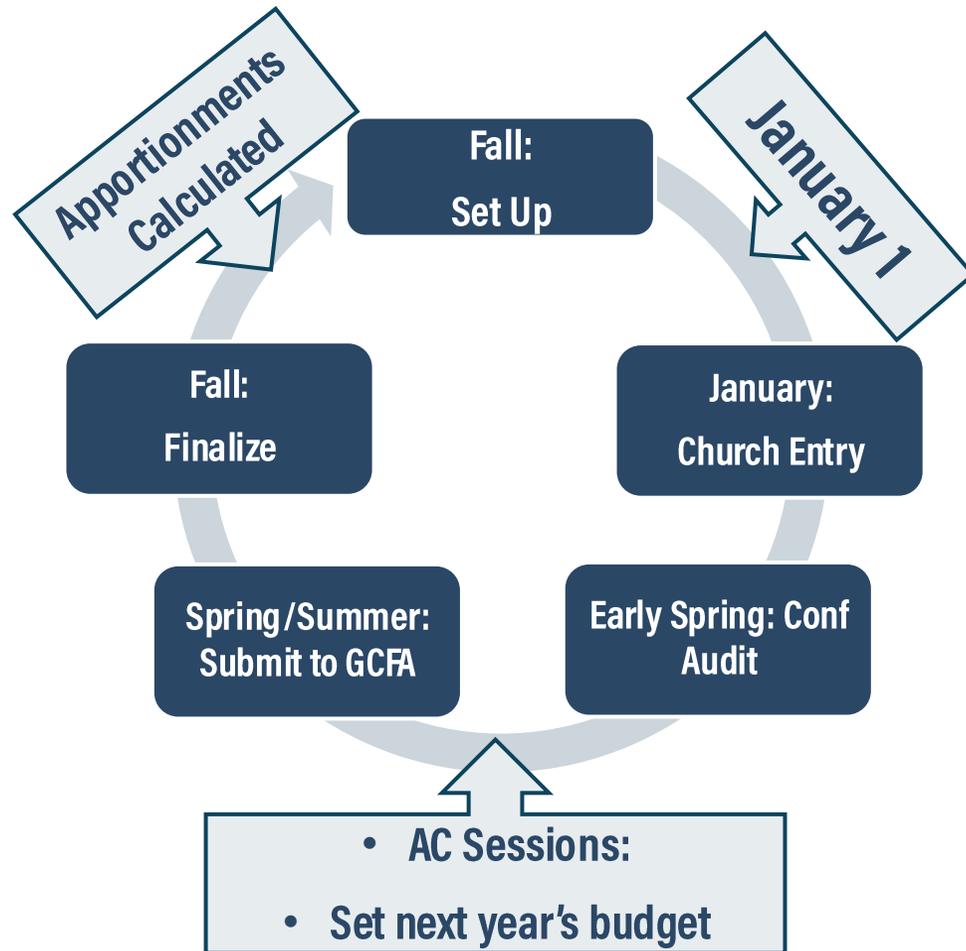
- Have churches verify apportionments (Special Report) based on Tables
- Have meetings between churches and the DS
- Give early deadline for churches and statisticians
- Validate – Perform your own checks and balances to ensure the numbers you are submitting are correct. Is it complete? Is it accurate? Does it make sense?
- Pay close attention to the warnings/errors. Ask questions. Verify. Correct them. Pay attention to your data.

Most Common Mistakes



- **Not transferring membership out of closed/merged churches**
- **A total line is off**
 - Ex: line 4, 5, 6, 50, 55
- **Lines 24 and 25**
 - Line 24 being insurance value and not market value
 - Don't understand what it's asking so just guesses
- **Leaving an important line blank**
 - Line 1-7 (membership), 24, 28a-29b, 47, 52

Data Services Timeline



- **First Submission:** April 2026 (or earlier)
- **Corrections Due:** July 2026
- **Training will begin October 2026**
- If the reason you are holding off on submitting is because you are waiting on churches, **GO AHEAD AND SUBMIT.**
- That way, we can process the bulk of your report, and when you submit your corrections, you can then submit the outstanding churches.
- **This will minimize scrambling at the last minute!!!**

Timeline 2026 **Statistics**



2026 Statistical Timeline	
GCFA to Open to Conference	November 2025
Conference to open for church	January 1, 2026
Initial Submission to GCFA	April 30, 2026
Corrections Due to GCFA	July 31, 2026
GCFA to Finalize	August 31, 2026



Report Forms Update

Forms



Forms:

- BAC (GCFA, WesPath and HigherED)
- Stats
- Interims
- Charge Conference Forms (with help from conferences)
- Changes in Alignment
- Request for New Church/People Numbers
- Certificates
- Data Definitionss/Supporting Tables

Looking at ways to improve so conferences are not required to submit so many forms to GCFA or becoming a more automated process.

Available Training



● Data Drop In

- Every Wednesday 1 – 3 pm CST [Data Drop-In](#)

BAC

- Introduction to BAC – 3 sessions
- Changes to the BAC – 3 sessions

Interims/Certificates- 2 sessions

- **Chronicles**- Introduction to GCFA's Official Database

How GCFA Uses **Your Collected Data**

- To update records in Chronicles, the official UMC database
- Share data with general agencies to reduce duplication of reporting
- Denominational research
- Websites such as UMLData.org, GCFA.org and www.umc.org's Find-A-Church
- UMC Membership Reporting
- General Conference Delegate calculations (based on what printed in your Journals)
- Number of Bishops per jurisdiction (membership)

The image features a blurred background of a classroom. In the foreground, a person's hand is extended from the right side, palm up, as if presenting or gesturing. The word "Questions" is written in a large, bold, white sans-serif font across the center of the hand. The entire scene is overlaid with a semi-transparent blue filter.

Questions



UMC SUPPORT



FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH

Thank You!



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