ANNUAL CONFERENCE JOURNAL CREATION GUIDE

FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH

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Introduction & Background

This document discusses creating and submitting annual conference journals. These journals are collected from every conference in the United Methodist Church and detail the ways in which the various churches in the connection have ministered locally to achieve the mission of the connection globally. By creating and submitting this written testament to the faithfulness of United Methodists around the world, the annual conference becomes part of a historical record of how the UMC is transforming the world to become more like Christ and achieving the Great Commission.

What is an Annual Conference Journal?

An annual conference journal is "the annual volume in which each annual conference publishes the reports and records of its activities for the year."[1] Each annual conference is required to keep an exact record of its proceedings according to instructions and forms supplied by the General, Jurisdictional, and Central Conferences.

To obtain some examples of annual conference journals for reference, please contact Data Services at GCFA at DataServices@gcfa.org.

Each annual conference journal will typically contain the following sections: officers of annual conference; boards; commissions and committees; rolls of conference members; daily proceedings; business of the annual conference report; appointments; reports as ordered by the annual conference; annual report of the district superintendents (if any); memoirs; roll of dead-deceased clergy members; historical; miscellaneous; pastoral records; statistics; and an index.

More detailed descriptions and examples of these sections are contained later in this document. The goal of this document is to assist annual conferences with questions they may have on journal contents, creation, and submission.

Journal Preparation Guidelines

The annual conference officer that is responsible for the preparation and submission of the annual conference journal is the conference secretary. Some conference secretaries delegate the collection, editing, and production of various sections of the journal to other conference staff members, while others oversee the production and arrange for printing, etc.

Production of the journal is regulated by conference rules in terms of timelines, printer, distribution, etc. In some annual conferences, this responsibility is assigned to a journal editor other than the secretary,

[1] *A Dictionary for United Methodists*, Alan K. Waltz, Copyright 1991, Abingdon Press. Used by permission.

but in the majority of conferences where no such arrangement exists, it is the responsibility of the secretary.

The following is a general list of steps necessary in preparing and submitting the annual conference journal:

- Make all necessary arrangements with a printer or publisher for the printing of the journal well in advance of the time copy is to be submitted.
- Update lists or computer files of names and addresses of annual conference officers and membership of conference agencies to reflect any changes, which have occurred since publication in the previous year's journal.
- Update lists or computer files of conference membership rolls and directories to reflect changes in membership, changes in conference relationship, appointment changes, and other changes of address.
- Prepare daily proceedings as approved by the committee charged with reviewing and approving the minutes.
- Prepare "Business of the Annual Conference" and appointments, including last-minute changes in any material which is not fixed by conference action.
- Collect and prepare reports ordered by the conference; or, if reports have been printed before the session, correct and update the copy or computer files containing such reports to reflect conference action.
- Collect and prepare memoirs.
- Update and prepare sections such as conference standing rules, rolls of deceased clergy, historical material, etc.
- Update and prepare service records of ordained and diaconal ministers and local pastors.
- Secure a copy of statistical tables as prepared by statistician and/or treasurer.
- Prepare index; a thorough and usable index to the Journal will save users many times the amount of time required to prepare it.
- Read, correct, and approve proofs as needed (depends on printing process being used).
- Distribute the Journal (preparation of labels or lists for distributing).

Journal Submission

Who Receives Journals?

According to *The Book of Discipline 2020/2024,* annual conferences are required to submit copies of their annual conference journal to the following General Agencies:

- General Council on Finance and Administration (GCFA),
- Wespath Benefits and Investments (formerly General Board of Pension and Health Benefits),
- General Commission on Archives and History,
- Central Conference or Jurisdictional Commission on Archives and History,
- Annual Conference Commission on Archives and History,
- Connectional Table, and
- United Methodist Communications

The Book of Discipline 2016, ¶ 606.2: "Each annual conference shall send without charge to the General Council on Finance and Administration, Wespath, the General Commission on Archives and History, the Central Conference or Jurisdictional Commission on Archives and History, and the Annual Conference Commission on Archives and History two printed copies or a digital version of its annual journal. In addition, the annual conference shall send one printed copy or a digital version of its annual journal to the Connectional Table and one printed copy or a digital version to United Methodist Communications. If available, one copy of a digital version of the journal shall be sent to the General Commission on Archives and History and one copy to United Methodist Communications."

In order to simplify the distribution process and delivery requirements, the General Council on Finance and Administration (GCFA) has arranged with other General Agencies to share digital copies of all journals received.

How to Submit Journals

Annual conferences can submit journals to GCFA (who will then share with agencies as mentioned previously) in one of the three following ways (listed in order of preference):

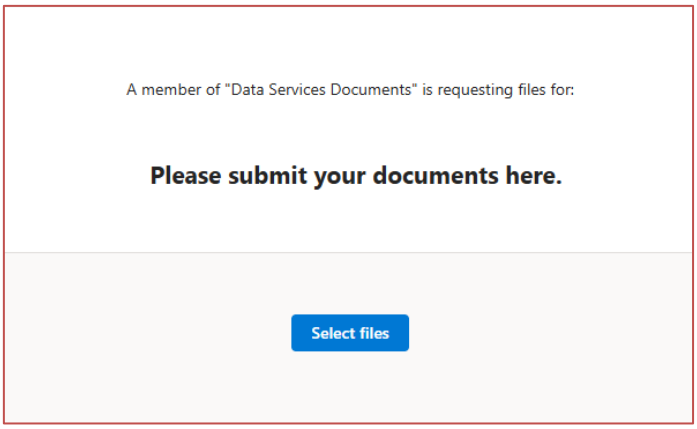
- SharePoint,
- Email, or
- Physical mail or hand delivery

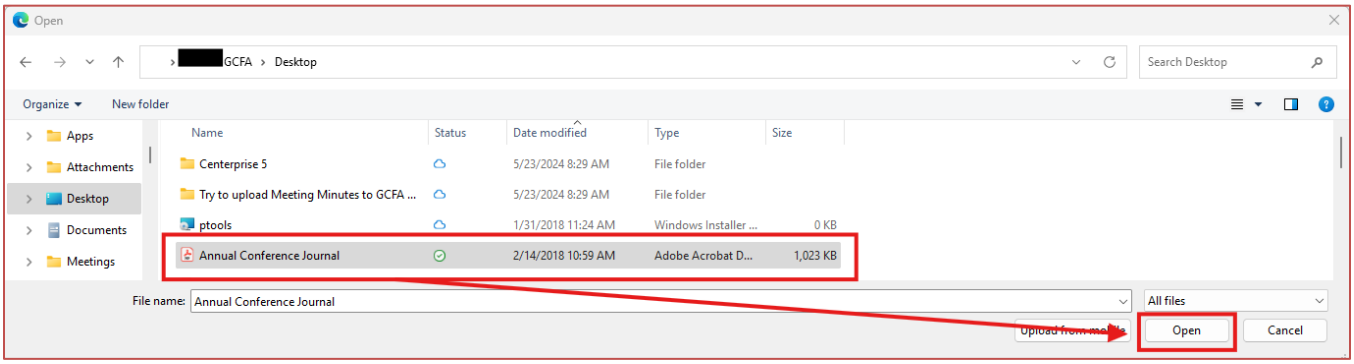
SharePoint

GCFA has set up a SharePoint link that allows annual conferences to submit their journals electronically. GCFA distributes the link in January to Annual Conference Secretaries as well as secondary journal contacts.

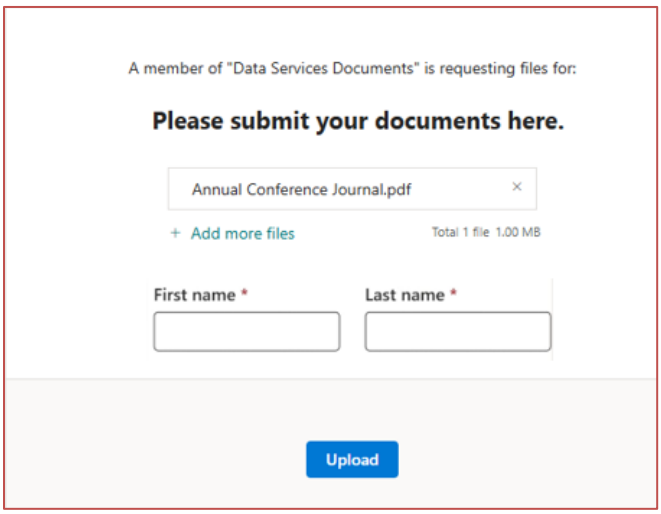
General instructions for submission via SharePoint are contained below.

- Click the SharePoint link distributed by GCFA.
- Click the **Select Files** button.
- Browse to the location of the annual conference journal on your computer and select the file. Click the **Open** button.





- Enter your name and then click the **Upload** button to send the files to the SharePoint location.



Email

Annual conferences may also submit journals via email by attaching the electronic file to an email addressed to: dataservices@gcfa.org. In the subject or body of the email please reference the name of annual conference and the year for the journal that is attached.

Physical Mail

Annual conferences may mail a physical copy of the annual conference journal to the following address:

GCFA
c/o Data Services
1908 Grand Ave.
PO Box 340029
Nashville, TN 37212

For all submission methods, please remember to state the name of the annual conference and the year for the journal being submitted.

When to Prepare and Submit Journals

GCFA should receive the journal within three months of completion of the annual conference session. This will be dependent on the date of the annual conference and the time it takes to compile the required information. Please make arrangements for formatting, layout, and editing prior to the annual conference so that planning logistics do not hinder the publication and submission of the journal.

Journal Contents

According to ¶ 606.3 of *The Book of Discipline 2020/2024* "The annual conference may form a committee on journal publication. The annual conference journal shall include the following divisions, in the following order:

a) Officers of annual conference,
b) Boards, commissions, committees; rolls of conference members,
c) Daily proceedings,
d) Business of the annual conference report (formerly known as the disciplinary questions),
e) Appointments,
f) Reports as ordered by the annual conference,
g) Annual report of the district superintendents, if any.
h) Memoirs as ordered by the annual conference following the guidelines of the General Commission on Archives and History,
i) Roll of dead-deceased clergy members,
j) Historical,
k) Miscellaneous,
l) Pastoral record (including the records of accepted local pastors in such manner as the conference may determine),
m) Statistics,
n) Index."

Different conferences may have variations in the way they present and deliver the information based on how the data is collected, the nature of their conference, and various other reasons. The primary concern is that the information required for each section is present somewhere in the journal.

The remainder of this document details what these various sections may look like and what type of information is contained is each.

Officers of the Annual Conference

The Officers of Annual Conference section contains a listing of the persons and contact information for various officer positions such as Conference Secretary, Conference Treasurer, Conference Statistician, etc. Figure 1 provides a sample of this section taken from a previous journal of the Florida Annual Conference.

OFFICERS OF THE CONFERENCE

Conference Secretary: Beth Gardner; 942 South Blvd, Lakeland, FL 33803; Phone: (863) 682-8191; Fax: (863) 688-8175; beth.gardner@flumc.org

Conference Treasurer: Anthony (Tony) Prestipino; 450 Martin Luther King, Jr. Ave., Lakeland, FL 33815; Phone: (800) 282-8011, Ext. 112; aprestipino@flumc.org

Conference Statistician: Anthony (Tony) Prestipino; 450 Martin Luther King, Jr. Ave., Lakeland, FL 33815; Phone: (800) 282-8011, Ext. 112; aprestipino@flumc.org

Director; Connectional Ministries: Sharon G. Austin; 450 Martin Luther King, Jr. Ave., Lakeland, FL 33815; Phone: (800) 282-8011; Ext. 103; Fax: (863) 680-1912; sharon.austin@flumc.org

Conference Lay Leader: Paulette Monroe; Conference Lay Leader; ***Address***; Phone: (###) ###-####; paulette.monroe@flumc.org

Associate Conference Lay Leader: Rachael Sumner; ***Address***; Phone: (###) ###-####;; ******@yahoo.com

Associate Conference Lay Leader: Alice Williams; Associate Conference Lay Leader: ***Address***; Phone: (###) ###-####;; ******@aol.com

Conference President; UMM: John Rogers; ***Address***; Phone: (###) ###-####;; ******@******.com

Conference President; UMW: Kay Roach; ***Address***; Phone: (###) ###-####;; ******@******.net

President; Conference Trustees: ***Address***; Phone: (###) ###-####; ******@aol.com

Figure 1: Officers of the Annual Conference from a Journal of the Florida Annual Conference.

This information is important to include in the annual conference journal as it provides various UMC organizations with the appropriate contacts should questions arise regarding the journal and its contents.

Boards, Commissions, Committees and Rolls of Conference Members

Not all conferences have the boards as exactly described or organized per the *Discipline*. If that is the case, please list the leaders or officers of the groups with the function that most closely relates to the listed groups. The list of required board, commission, and committees are as follows:

- Council on Finance and Administration (¶611),
- Board of Ordained Ministry (¶635),
- Board of Pensions (¶639),
- Board of Trustees of the Annual Conference (¶2512),
- Committee on Episcopacy (¶637), and
- Administrative Review Committee (¶636).

Figure 2 shows a sample portion of the Conference Council on Finance and Administration subsection taken from a previous journal submitted by the Sierra Leone Annual Conference.

2. CONFERENCE COUNCIL ON FINANCE AND ADMINISTRATION

1. The Resident Bishop – Ex-Officio
2. Conference Lay Leader
3. Associate Conference Lay leader
4. Chair Conference Finance committee
5. Conference Chancellors
6. Dean of Cabinet
7. Director of Connectional Ministries – Ex-Officio
8. Administrative Assistant to the Bishop – Ex-Officio
9. Conference Secretary
10. Conference Treasurer – Ex-Officio
11. Business Manager – Ex-Officio
12. All Programme Heads (Directors and Coordinators) – Ex-Officio (8)
13. President United Methodist Youth, Young Adults, men, Women Young Women
14. UM Women's Coordinator
15. Missionaries
16. Mr. Alex Kamara
17. Mrs. Mariatu Finoh
18. Rev. Raymond Bola-Williams
19. Mrs. Angella Bayoh
20. Mr. Amadu B. Ndoeka
21. Chair Board of Trustees
22. Mr. Michael Abdulai

Figure 2: Conference Council on Finance and Administration subsection taken from ***taken from a previous journal submitted by*** *the Sierra Leone Annual Conference.*

As can be seen in the figure this listing contains the conference positions which serve on the Conference Council on Finance and Administration for Sierra Leone (e.g. 2. Conference Lay Leader) as well as specific individuals on this conference council (e.g. 16. Mr. Alex Kamara).

Although not shown in this example, it is recommended that contact information for the persons serving on the various annual conference boards and committees be contained within the journal.

The list of required boards, commissions, and committees may not be exhaustive. Boards and committees that are key to your conference's functions but are not included in the *Discipline* should be listed as well. Other committees that are commonly formed and listed are as follows:

- General Board of Church and Society,
- General Board of Discipleship,
- General Board of Global Ministries,
- General Board of Ordained Ministry,
- Higher Education and Campus Ministry,
- General Commission on Archives and History,
- General Commission on Christian Unity and Inter-religious Concerns,
- General Commission on Religion and Race,
- General Commission on the Status and Role of Women, and
- United Methodist Communications.

Again, this information is important to include in the annual conference journal as it provides various UMC organizations with the appropriate contacts should questions arise regarding the journal and its contents.

Daily Proceedings

The daily proceedings include the agenda for the annual conference, a narrative of the occurrences on the floor, and any additional information as needed. The formatting of this section is left to the discretion of the conference secretary or journal editor. Figure 3 shows a sample excerpt of the Daily Proceeding taken from a previous journal submitted by the Florida Annual Conference.

2016 Journal of the Florida Annual Conference
THURSDAY AFTERNOON - JUNE 16

GATHERING MUSIC: Jeremy Hearn, Worship Leader, provided music as the members arrived.

OPENING WORSHIP: SERVICE OF WORD AND TABLE: Rev. Latricia Scriven led the members in the opening Call to Worship. The song, "Presence" was sung along with "Oh Love That Will Not Let Me Go." Following a Prayer of Confession led by Rev. Dr. Walter Monroe, the scriptures were read: John 21:4-14 by Rev. David Lumberry and Luke 5:1-11 by Rev. Rachel DeLaune. Bishop Carter's sermon "Deeper Waters: Leadership in Complicated and Challenging Times" was a call for all of us to "cast our nets into deeper waters." The offering was collected. One half of the offering will go to the Africa University for scholarships in the Faculty of Theology and the Institute of Peace, Leadership and Governance, and half will go to the Young Adult Missional Movement. Rev. Dr. Kandace Brooks read "Poem by Poem" by Juan Felipe Herrera. Bishop Carter introduced Bishop Adam Richardson, Jr. bishop in the African Methodist Episcopal Church, serving in West Africa. Bishop Richardson and Bishop Carter shared "A Conversation About Leadership" and then both bishops shared in consecrating the elements for Holy Communion and led us in a renewal of our baptismal vows. Holy Communion was served. Rev. Emily Knight offered the closing prayer. The closing hymn was "And Are We Yet Alive." Bishop Carter offered the Benediction.

ORGANIZATION OF THE CONFERENCE: Bishop Carter called the 173rd session of the Florida Annual Conference to order at 3:33 p.m. Rev. Elizabeth Gardner, Conference Secretary, moved that the following persons be elected to serve as Administrative Assistants for this Annual Conference Session:
Secretary Elect: Rev. Elizabeth Gardner
Journal Secretaries: Laurie Hofts, Rev. Patricia Aupperlee
Journal Committee: Jim Luther, Sandy Voigt, Rev. Ken Minton, Rev. Carmen Arnett
Head Usher: Ted and Dawn Eckbreth
Time Keeper: Rev. Hung "Bo" Sim
Parliamentarian: Robert Grizzard
Bishop Carter called for a vote on the motion, and they were elected. Rev. Gardner moved that the entire Empire Room be designated as the Bar of the Conference. Bishop Carter called for the vote, and it was approved. Rev. Gardner reminded the members to register their attendance to receive their Conference materials and their nametag. She reminded members that the sessions were being broadcast via the web and urged them to notify their members back home to join us on-line.

WORDS OF THANKS AND APPRECIATION: Rev. David Dodge thanked the Cabinet, Conference and District Staff members, and the scores of volunteers who have worked tirelessly to plan and prepare for this year's Annual Conference. He reviewed the rules of the Conference, *Roberts' Rules of Order*, and gave instructions on how to be recognized by waving yellow card.

Figure 3: Excerpt of the Daily Proceeding taken from a previous journal submitted by *the Florida Annual Conference.*

The record of daily proceedings provides a historical record that is available for the UMC connection, researchers, and any other persons as necessary to understand how the actions of a conference came to be.

Business of the Annual Conference Report (BAC)

The BAC (formerly known as Disciplinary Questions) is a form that lists important questions about conference leadership, church, and clergy changes that happened during your conference's 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 annual conference leadership.

The *Discipline* mandates that official records of secretaries, statisticians, and treasurers shall be kept according to the forms prepared by the GCFA so that official statistical and financial items shall be handled uniformly in all annual conferences.

The *Discipline* also mandates that all records of candidates and 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).

Figure 4 shows a very small excerpt of the BAC report taken from a previous journal submitted by the Northwest Philippines Annual Conference.

BUSINESS OF THE ANNUAL CONFERENCE REPORT
(Formerly known as the Disciplinary Questions)

1. Who are elected for the quadrennium?
    1.1 Secretary? Rev. Vicky Baybay
    1.2 Statistician? Rev. Maximo Gallardo
    1.3 Treasurer? Engr. Araceli De Castro
2. Is the Annual Conference Incorporated? **Yes**
3. Bonding and Auditing
    3.1 What officers handling funds of the conference have been bonded and in what amount? (par. 615,2511)
        Conference Treasurer, P10,000.00
    3.2 Have the book of the said officers or person been audited? **Yes**
    3.3 Does the Annual Conference maintain a bank account in its name? **Yes**
    3.3 Does the Annual Conference maintain a bank account in its name? **Yes**
4. What conference Councils, Boards, Commissions and Committees have been appointed or elected?
    4.1 Councils
        4.1.1 Council on Finance and Administration: **Yes**
        4.1.2 Annual Conference Coordinating Council: **Yes**
        4.1.3 Council on Youth Ministries: **Yes**
        4.1.5 Council on Young Adult Ministry: **Yes**

Figure 4: Excerpt of the BAC report taken from a previous journal submitted by the *Northwest Philippines Annual Conference.*

As can be seen in Figure 4, the BAC report is quite detailed and can be extensive.

Annual conferences with questions regarding the completion of the BAC section may direct inquires to dataservices@gcfa.org.

Appointments

The appointments section lists the appointments made by the cabinet that will be in effect for the year until the next annual conference session. For this section, Part IX of the BAC can be referenced or used in place of this journal section. The necessary information that must be present is clergy name, clergy status, and clergy's appointment for the coming year. Figure 5 shows an excerpt of the appointments section taken from a previous journal submitted by the Alabama-West Florida Annual Conference.

2016 - 2017 APPOINTMENTS (as of July 1, 2016)

NEW APPOINTMENTS, STATUS CHANGES ARE IN BOLD

AF Affiliate member; AM Associate member; D Deaconess; FD Deacon in full connection; FL Full time Local Pastor; LFS Less than Full Time Status; OA Associate Member of other annual conference; OD Deacon member of other annual conference or other Methodist denomination; OE Elder member of other annual conference or other Methodist denomination; OF Full Member of other denomination; PD Provisional Deacon; PE Provisional Elder; PL Part time Local Pastor; RA Retired Associate Member; RD Retired Deacon in full connection; RE Retired Full Elder; RL Retired Local Pastor; SY Supply; TBS To Be Supplied

Elders in full connection have no designation by their name. An asterisk (*) next to a charge name or an individual church denotes 100% participation in the missional and ministry giving through apportionments for 2015. Italics designates deceased after April 30 and will be memorialized at the next annual conference.

BAYPINES DISTRICT

District Superintendent. ..... June E. Jernigan (2)
*Andalusia First (1010)… .....Jason Thrower (2)
*Atmore First (1015)… .....Debora Bishop (4)
*Bay Minette First (1025)..... Jay Cooper (3)
*Bermuda (1035)/Owens Chapel (1285)…Margaret S. (Marg) Perelli (FL) (2)
*Brewton First (1045)… ..... Anthony J. McCullough (2)
Brownville (1050). .....Vern Klingler (RL) (3)
*Canoe (1055) .....Larry Renfroe (RL) (4)
Castleberry (1060)/*Baggetts Chapel (1020). ..... Norman Brown (RE) (3)
Cedar Hill (1065) ..... Bernie Raines (SY)(1)
Daphne (1090)..... Bill Elwell (1)

Figure 5: Excerpt of the Appointments section taken from a previous journal submitted by the Alabama-*West Florida Annual Conference.*

As shown in the figure, the appointments section starts with some notes on how appointments are reported (e.g. status changes are bold in this journal and the various clergy status codes used). Then the appointments are listed by district with churches/locations down the left had side and the people appointment (along with their status and tenure at this location in parenthesis) down the right hand side.

This information is used to update the UMC database of clergy records to create and keep a historical record of pastoral careers and to update the records regarding pastoral compensation and retirement. This information is widely used by a number of General Agencies, including GCFA and Wespath.

Reports as ordered by the Annual Conference

Depending on your conference and bishop, the required reports may vary. Generally, the reports include the following:

- Annual conference office and board reports,
- Financial reports,
- Reports from ministry partners about contributed funds.

There is no prescribed format for these reports, however best practices suggest a narrative or outline format that clearly states the name of the entity giving the report, the accomplishments or goals achieved, and any additional information or challenges that may be faced in the upcoming year. Figure 6 shows a sampling of the Report for the "Episcopal Office Staff, Communications, and Human Resources" department taken from a previous journal submitted by the Iowa Annual Conference.

Episcopal Office Staff, Communications, and Human Resources

ACTION ITEM # 101

1. State the primary purpose of your agency.

The Bishop is to provide general oversight for the fiscal and program operations of the Annual Conference, to ensure fair process for clergy and laity, and deploy clergy.

a. How, specifically, is your ministry area/agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order?

The work and office of the Bishop is required by the 2012 Book of Discipline of the United Methodist Church to provide Leadership, Spiritual and Temporal, to the United Methodist Church, to perform Presidential Duties, and work with the Ordained Licensed, Consecrated, and Commissioned Personnel, ¶s414, 415, & 416.

b. How is your Ministry Plan informed and guided by the Annual Conference's Strategic Priorities?

The Episcopal Office is working with others to shepherd, implement and maintain accountability to the Strategic Priorities.

2. Outline your 2017 Ministry Plan, including the financial plan required to support your Ministry Plan and the amount of funding you are requesting from apportionments.

The Episcopal Office works and coordinates the work of our District Ministry Teams (Superintendents, Field Outreach Ministers, District Administrative Assistants) the Ministry Cabinet, Conference Communications, Human Resources, the Board of Ordained Ministry, Connectional Ministries, the Annual Conference Session Committee, Ministerial Ethics, Conflict Transformation, Intentional Interim Ministry, the Board of Laity, and the various task forces as called by the Bishop.

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2017 Apportionment $711,757

Figure 6: Report for the "Episcopal Office Staff, Communications, and Human Resources" department taken from a previous journal submitted by the Iowa Annual Conference.

As shown in the figure, this report follows an outline format with answers for a set of prescribed questions ending with the requested budget for the office/board in the coming year. Please follow the instructions of your bishop and conference when creating and presenting the report. These reports are used to provide a detailed narrative of the occurrences and activities of the conference for historical records and research purposes.

Annual Report of the District Superintendent

The district superintendent reports provide the annual conference with an overview of the status of the districts. Key things to mention in the report are any accomplishments or milestones that occurred in the district, problems with the membership or clergy that have arisen, and any other issues that may be of concern. Also, please follow the instructions of your bishop and annual conference leadership in reporting to the annual conference regarding the format and content. One abbreviated example taken from a previous journal submitted by the Alabama-West Florida Annual Conference is provided in Figure 7 below.

DISTRICT REPORTS

BAYPINES

The Baypines District has had another successful year as we have expanded our ministries and continued to engage our congregants - encouraging them and ourselves to grow as Disciples. We feel like we are better connected as a District than than we have been in the past and we feel there is a better spirit among the churches and the clergy. Because our District is so diverse geographically it has always been a challenge to be unified. We feel like we are making great progress on embracing this diversity and in discovering our identity. We are excited to see that people across our District know and care for people in other communities. We are looking to build on the partnerships that we feel exist in the District. We want to encourage our churches to step out and risk new things. We want them to reach out to other churches as we continue to partner together in missions. We want to reach out to our young people and get them more connected to the larger church. In short, we want to be better stewards of our Connection. We are excited about the many things that are going on in the District. Below are some of the highlights from this past year.

The District is in great financial shape and we are excited about that. We are now debt free as a District and our paying of apportionments continues to rise.

As a result, our missional giving also continues to increase. Our District met and exceeded its goal in the Conference's Imagine No Malaria campaign!

Our United Methodist Men and United Methodist Women continue to be a strong force in our District. They are active and involved in many local, District and Conference projects. As we look to the future, our goal is to have an active UMM and UMW group in each church.

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Figure 7: Excerpt of the Baypines district report taken from a previous journal submitted by the Alabama-West Florida Annual Conference.

Roll of deceased clergy members

The roll of deceased clergy members list the clergy members that have died since the previous annual conference. The relevant section of the BAC may be referenced in lieu of listing names. Figure 8 shows a sample of the roll of dead-deceased clergy members taken from a previous journal submitted by the Alabama-West Florida Annual Conference.

Roll of the Deceased (alphabetical order)

At the annual session of the Alabama-West Florida Conference, the Commission on Archives and History sponsors a commemoration service to remember those who have died during the conference year. Those listed below who died May 1, 2015 through April 30, 2016 were remembered at the 2016 Annual Conference Session.

Rev. Clifford M. Abbott	Died: October 4, 2015
Mrs. Aeoline Anthony (Rev. Mark Wilson Anthony)	Died: November 24, 2015
Rev. Alva E. Beers	Died: August 11, 2015
Rev. Harold B. Bordages	Died: September 30, 2015
Rev. Dr. Cecil E. Bradley	Died: February 28, 2016
Mrs. Sallie D. Bradley (Rev. Ben Bradley)	Died: October 29, 2015
Rev. Arthur M. Carlton	Died: April 28, 2016
Rev. W. Thad Chesser	Died: September 17, 2015
Mrs. Ruth T. Eddins (Rev. Henry Earl Eddins, Jr.)	Died: August 25, 2015
Rev. Molly E. Fulford	Died: March 19, 2016
Rev. Dr. Charles C. Hays	Died: September 25, 2015

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*Figure 8: Excerpt of the roll of deceased clergy members section **taken from a previous journal submitted by** the Alabama-West Florida Annual Conference.*

The list of deceased clergy is used to update and maintain records at GCFA and Wespath pertaining to UMC data records and information about retirement payments and beneficiaries.

Memoirs as ordered by the Annual Conference

A memoir is an account of each deceased individual who has served the church as a clergyperson, clergy spouse, or lay member of the annual conference. The account should be accurate as well as both brief and comprehensive.

The memoir is not designed to be either a eulogy or a memorial sermon. Yet, when created skillfully and sympathetically, this brief and specialized biographical account can be a document suitable both as an historical record and a synoptic portrayal of personality and spirit. Figure 9 shows a sample of a memoir taken from a previous journal submitted by the Florida Annual Conference. Once the memoir is published, it is as a historical resource expected to be authentic and accurate.

More information on working with memoirs in annual conference journals can be found at the link below:

http://gcah.org/resources/working-with-memoirs

JOCELYN JEAN-BAPTISTE ADHEMAR

Jocelyn Jean-Baptiste Adhemar, Sr., was born on March 20, 1952, in Ft. Liberty, Haiti, to Henricia Manigat and the late Jean-Baptiste Adhemar. In 1975 Jocelyn graduated from Emmanuel Eugene College. Upon graduation, he taught multiple disciplines at St. Paul College. He graduated from the Wesleyan Theological School in 1983. During this time, he worked in Compassion International as a team leader, supervisor, and area coordinator. Following his ordination in the Wesleyan Church, he was a senior pastor at Cite Chauvel in Cap-Haitian, Haiti.

On December 27, 1986, he married Evangeline Jacques, with whom he had four children: Takishmah, Jovani, Joyce, and Jocelyn Adhemar, Jr. In 1989 he officially moved to the United States and in 1990 became a senior pastor at Ebenezer Baptist Church in West Palm Beach, Florida.

In 1992 he joined The United Methodist Church and became a local pastor in the Florida Conference. His first appointment was to the Hallandale Haitian Mission, where he served for a year, 1992-93. His second and last appointment was at St. John's Haitian Mission in Boynton Beach, where he ministered from 1993 to 2008. In 1995 he became an associate member of the conference and in 1997 became the first Haitian to be ordained an elder in the Florida Conference.

In May of 1997 he graduated with a master's degree from Emory University. He was a staff member at the C.R.O.S. ministries, chairperson of the Committee on Haitian Ministry, member of the Episcopal Committee, and member of the conference mentoring program. After suffering a stroke in March of 2008, Reverend Jocelyn was unable to serve his congregation effectively so he relocated to Stuart, Florida, where he was a member of First United Methodist Church. He took incapacity leave from the conference in 2009.

Reverend Jocelyn passed away on December 10, 2015, after a long battle with stroke complications. Funeral services were held on December 26, 2015, at First United Methodist Church in Stuart, Florida. Burial was in Fernhill Memorial Gardens in Stuart.

He is survived by his loving wife, Evangeline Adhemar; his children, Takishmah Adhemar, Jovani Adhemar, Joyce Sarah Adhemar, and Jocelyn Adhemar, Jr.; brothers, Daniel Adhemar, the Reverend Amos Adhemar, and Jean Claude Jean-Jacques; sisters, Christianne Mondelus, Marie Marthe Dhethelusma, and Emma Adhemar; stepmother, Marthe Adhemar; and many other family members and friends.

Figure 9: Sample memoir taken from a previous journal submitted by the Florida Annual Conference.

Historical

The historical record is a history of the annual conference that documents its progress through the years. This provides a record for the annual conference as a reference in the future. This is particularly essential if conferences have merged over time.

2015 Journal of The Eastern Pennsylvania Conference
The United Methodist Church
Historical Record

The Record of Conference Sessions for the Eastern Conference and its predecessor Conferences, for the years 1799-1969, will be found in the 1969 Journal of the Eastern Conference; likewise, the Record of Conference Sessions for the Philadelphia Annual Conference, and its predecessor Conferences, for the years 1786-1969, will be found in the 1969 Journal of the Philadelphia Annual Conference.

Uniting Conference

Year-Date	Place	Bishop	Secretary
1969 October 25	Reading, PA	J. G. Howard, H. J. Schieck	H. W. Kaebnick

Conference Sessions

Year-Date	Place	Bishop	Secretary	Pastors	Members
1970 June 16-19	Reading, PA	J. G. Howard	H. J. Schieck	624	186,763
1971 June 15-18	Annville, PA	J. G. Howard	D. L. Fife	651	183,077
1972 June 13-16	Reading, PA	J. G. Howard	D. L. Fife	664	179,329
1973 March 30	Reading, PA	J. M. Ault	D. L. Fife		
1973 June 19-22	Annville, PA	J. M. Ault	D. L. Fife	672	175,563
1974 June 11-14	Reading, PA	J. M. Ault	C. E. Weigel, Jr.	675	173,236

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Figure 10: Excerpt from historical section from a previous journal submitted by the Eastern Pennsylvania Annual Conference.

Miscellaneous

Different conferences use the miscellaneous section for different things. Some, like the conference referenced in Figure 11, use it to document their Safe Sanctuaries policies. Utilize this section to document details about the annual conference that are important but do not fit anywhere else in the journal.

The miscellaneous section gives the conferences the opportunity to document necessary and important information for the historical record. Figure 11 shows a sample excerpt from the miscellaneous section taken from a previous journal submitted by the Greater New Jersey Annual Conference.

MISCELLANEOUS

SAFE SANCTUARIES POLICY

Greater New Jersey Annual Conference Safe Sanctuaries Policy can be retrieved on the Greater New Jersey United Methodists Church website at https://www.gnjumc.org/safe-sanctuaries/

CLERGY/LAITY SEXUAL MISCONDUCT, ABUSE AND HARASSMENT POLICY FOR THE GREATER NEW JERSEY ANNUAL CONFERENCE (Approved at the 2009 Annual Conference)

All references to the Book of Discipline are in the 2008 edition. Paragraph numbers are for easy reference and may change with future editions of The Book of Discipline. Unless there are substantive changes to the content of the Book of Discipline, the Policy will be updated to reflect the current Book of Discipline as editorial changes without the need to reapprove the Policy. Future name changes of Greater NJ Annual Conference will also be updated as editorial changes.

I. Context

For the purpose of this policy, we will use "clergy" or "clergyperson" to refer to all ordained, commissioned, consecrated, licensed local pastor, supply pastor and Certified Lay Minister.

II. Purpose

Clergy are in a position of great trust, power and responsibility. This provides the opportunity for unique relationships of grace and caring. While most clergy remain faithful to their vows and their covenant with God and the church, there are clergy who sometimes violate the trust given them. Sexual misconduct is one grave violation of this trust. We also acknowledge that laypersons can engage in acts of sexual misconduct, abuse and/or harassment. This policy seeks to address the abuse of power by all clergy and laity who engage in sexual misconduct, abuse, and/or sexual harassment. (See Section IV for definitions)

Incidents of sexual misconduct, abuse, and/or harassment have been reported in United Methodist Churches, agencies, and institutions. It is both the ethical and legal responsibility of the Annual Conference to ensure that there are mechanisms for addressing grievances in these matters. The intent of this document is to provide guidance to both laity and clergy of the Annual Conference, and to the local churches contained therein regarding clergy/lay sexual misconduct, abuse, and/or harassment.

It is our hope, as the people of Christ that this policy will help serve to guard against inappropriate behavior and be a guide for our community of faith as we seek to handle grievances should sexual misconduct, abuse, and/or harassment occur.

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Figure 11: Excerpt from the Miscellaneous section taken from a previous journal submitted by the Greater New Jersey Annual Conference.

Pastoral Record

The Pastoral Record lists the all of the pastors in the conference, their position and status as of the current annual conference, their contact information, and the location and date of their appointment history. Figure 12 shows a sample of this section taken from a previous journal submitted by the Northern Illinois Annual Conference.

Journal CLERGY SERVICE RECORDS
ELDERS IN FULL CONNECTION

AHN, ILSUP
Probation 2001. Full 2004. 2001 Cedarville (3/4 time), To attend school (1/4 time). 2003 Orland Park: First Korean. 2004 North Park College. (CC: Glenview)

AHNE, JOSEPH JOO-YOUNG
Probation 1984. Full 1988. 1984 In School. Chicago: Vincent. 1985 Mt. Prospect: Northwest. 1986 Mt. Prospect: Wesley. 1990 Elmhurst: Faith. 8/1993 York House. 1995 In School. 6/2003 Torch-Trinity Graduate School (Seoul, S. Korea). 1/2004 Master Life Mission Institute (Deer Park, IL, President). 2009 Retired.

ALLEN, JAMES EDWARD
Probation 1952. Full 1959. 1952 Pearl Union. 1955 Miami, Ohio. 1959 Center Jerusalem. 1962 Ransom EUB and Methodist (Yoked). 1965 Plainfield. 1967 Shannon: Bethel. 1970 Sycamore (Associate). 1974 Savanna. 11/1979 Joliet: Ottawa Street. 1990 Will County Adult Detention Facility (Chaplain). 1991 Center for Correctional Concerns (Joliet, Chaplain). 1993 Retired. (CC: Joliet: Ottawa Street).

ALLEN, LOWELL DEAN
Probation 1951 (Missouri). Full 1958. 1959 Rock River Conference. 1953 Davis, Dakota. 1958 Thomson, Hickory Grove, Argo Fay. 1961 Polo. 1967 Harding, Serena, Prairie Center. 1971 Rock Falls. 1979 Rockford: Christ (Associate). 1981 Aurora: Bethany. 1985 Chicago: Edison Park. 9/1992 Retired. 1993 Shirland, Owen Center (Less than full time, until 3/2000).

ALLEN-STEWART, PATRICIA E.
Probation 1978. Full 1983. 1991 Lake Villa. 2003 Personal leave. 4/2011 Galena, Scales Mound. 2014 Galena.

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Figure 12: Excerpt of the Pastoral Records section taken from a previous journal submitted by the Northern Illinois Annual Conference.

GCFA and GBHEM utilizes the information in the pastoral rolls to track the ministerial careers and progression of all pastors in the UMC Connection. This information is also used by several other agencies and some annual conferences to track pastoral candidates and their ministerial history.

Statistics

Annual conference statistics are used to measure the growth of the UMC Connection, identify key areas of success, and influence decisions by annual conferences, general agencies, and bishops. Statistics are also used to calculate the conference's apportionments and the number of delegates to General Conference.

The Secretary of the General Conference uses the statistical reports printed in the annual conference journals to determine the number of delegates for General Conference. This is described in ¶ 512.5 of The *Discipline*:

"The secretary of the General Conference shall calculate the number of delegates to be elected by each annual conference, based on the factors specified in ¶ 502.1, 2, using the most recent clergy and professing lay membership figures reported by the local congregation to the annual conference and from the annual conference to the General Council on Finance and Administration through their conference journals, as follows:

a) One clergy delegate for the first 375 clergy members of the annual conference and one clergy delegate for each additional 375 clergy members or major fraction thereof, and
   One clergy delegate for the first 26,000 members of local churches of the annual conference and one clergy delegate for each additional 26,000 local church members or major fraction thereof, and
b) A number of lay delegates equal to the total number of clergy delegates authorized as above.
c) Every annual conference shall be entitled to at least one clergy and one lay delegate.
d) This formula is designated to comply with the Constitution, Division Two, Section II, Article I (¶ 14), which defines the minimum and maximum number of delegates to a General Conference. Should the computations provided in the paragraph result in a figure below the prescribed minimum or above the prescribed maximum for delegates, the Commission on the General Conference shall be authorized to remedy the situation by adjusting up or down the numbers of clergy members and members of local churches of the annual conference necessary to entitle an annual conference to elect delegates, any such adjustment to be proportionally the same for the two factors."

The exact format and details of how annual conferences report statistics tends to vary, but given the information above, it would be advantageous to ***ensure that the statistics sections contains at least the total number of clergy and lay members in aggregate for the entire conference*.**

GCFA will sometimes receive journals in which the statistics are reported at the district level in which some districts will be missing – ***it is important that the summary statistics for the entire conference (all districts) are reported***.

Aside from overall conference summary statistics and simple clergy and member numbers, it is common for conferences to report detailed statistics collected from individual churches and/or districts. Oftentimes these reports will be similar in format to the statistical reporting forms GCFA asks jurisdictional and central annual conferences to fill out annually.

For instance, consider Figure 13, which shows a small sample section or the Statistics section taken from a previous journal submitted by the Florida Annual Conference. The **Line** and **Descriptions** columns used here exactly reflect the same items from the GCFA jurisdictional conference annual statistics forms. Notice that in addition to the 2015 numbers, Florida has chosen to also report the 2014 numbers and percentage changes.

Notice that the statistics from the calendar year 2015 are reported in the 2016 journal – this is because the 2016 statistics will not have been finalized at the time of the 2016 annual conference session.

Summary Stats – Florida Conference 2015				
Membership & Participation				
Line	**Description**	**2014**	**2015**	***Difference***
1	Total professing members reported at the close of last	262, 186	252, 849	*3% Decrease*
2.a	Received this year on Profession of Christian Faith	5,393	4,464	*17% Decrease*
2.b	Restored by affirmation	1,191	1,188	*Less than 1% Decrease*
2.c	Correct previous year's reporting errors of total professing membership numbers by addition	732	923	*26% Increase*
3	Transferred in from other United Methodist churches	2,945	2,694	*8% Decrease*
4	Transferred in from non-United Methodist churches	1,662	1,903	*14% Increase*

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Figure 13: Excerpt of Statistics section taken from the 2016 Journal of the Florida Annual Conference.

Consider also Figure 14, which shows an excerpt from the 2016 Journal of the East Africa Episcopal Area. In this case, the reported statistics reflect the GCFA central conference statistical forms and values.

Kenya-Ethiopia Annual Conference

Annual Conference Name:	Kenya-Ethiopia Annual Conference
Person Completing Form:	Rev. Wilton ODONGO
Date of Data Collection:	2015

Membership: This section asks about the members of churches in your annual conference in 2015. These numbers are important because they help calculate the number of delegates for General Conference as well as the amount paid towards apportionments.		
7.	Professing Membership: How many members are baptized as Christians and are professing members of the UMC (¶ 215, See Attached)?	17537
8.	Baptized Members: How many members (including children)are baptized as Christians but are not professing members of the UMC(¶ 215, See Attached)?	3811
9.	Constituents: How many other people attend church? These people are not baptized or professing. They may be called constituents or friends of the church.	2016
10.	Professions of Faith: How many new disciples professed their faith to the UMC this year?	549
11.	Number of Baptisms: How many people were baptized this year?	442
12.	Average Weekly Worship Attendance: How many people on average attend church every week?	5421

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Figure 14: Excerpt of Statistics section taken from the 2016 Journal of the Kenya-Ethiopia Annual Conference.

GFCA prefers that every conference include at a minimum their annual statistical reporting form in the Statistics section of their journal. This alleviates confusion regarding the source of information. When providing this vital information it is important to avoid the following **pit-falls**:

- Totals do not reconcile – e.g. Districts do not add up to conference total
- Multiple values reported – e.g. Differing values appear on different pages with same labels

- Values vary greatly from other reports such as annual stats form
- Ambiguous labels such as 'Members'
- Membership total includes infants, children and/or baptized adults (non-professing members)
- Clergy totals include lay or volunteer clergy
- Numbers reported within block of text/narrative as opposed to tabular form resulting in difficulty for GCFA staff to locate numbers in non-English documents.
- District reports with varying information. No consolidated conference figures.

Similarly below are some helpful suggestions to keep in mind when filling out the Statistics section of the journal.

- Including GCFA stats form or more detailed area/conference form that includes membership breakouts. It is critical to show professing and baptized members as separate numbers.
- Clergy roster or BAC type document with clergy status (elder, deacon, local pastor, etc.) can be used to confirm/clarify clergy counts.
- District totals with conference total
- Ideal - Church level statistics with conference total

Index

The Index is used as an easy way to reference and find information in the annual conference journal. Like any other index, it should contain a list of key terms and/or people along with page references into the document.

Summary

Journals are collected from every conference in the United Methodist Church and provide a historical document vital to the United Methodist Connection. They detail the ways the various churches in the Connection have ministered locally in order to achieve the mission of the Connection globally and become part of a historical record of how the UMC is transforming the world to become more like Christ and achieving the Great Commission. Information reported in annual conference journals is also used by Connection leadership to help shape the future direction of the UMC.

This document serves as a desk reference to annual conference personnel who may have questions regarding the creation, content, and submission of their journal. Questions outside the scope of this document may be directed to dataservicesz@gcfa.org.