



FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH

NAACT 2025 Data Developments

Introduction to Presenters



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DATA SERVICES



Data Governance



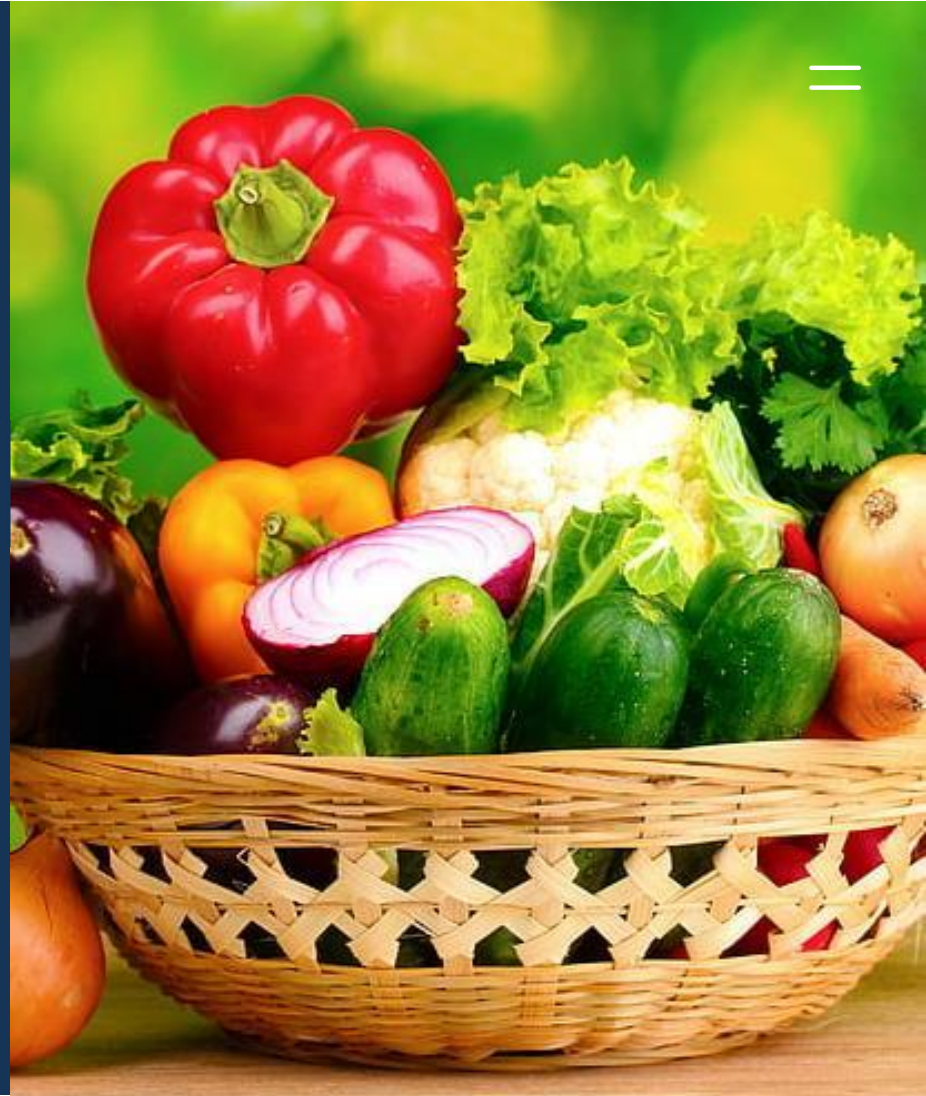
Automation



Usage & Delivery

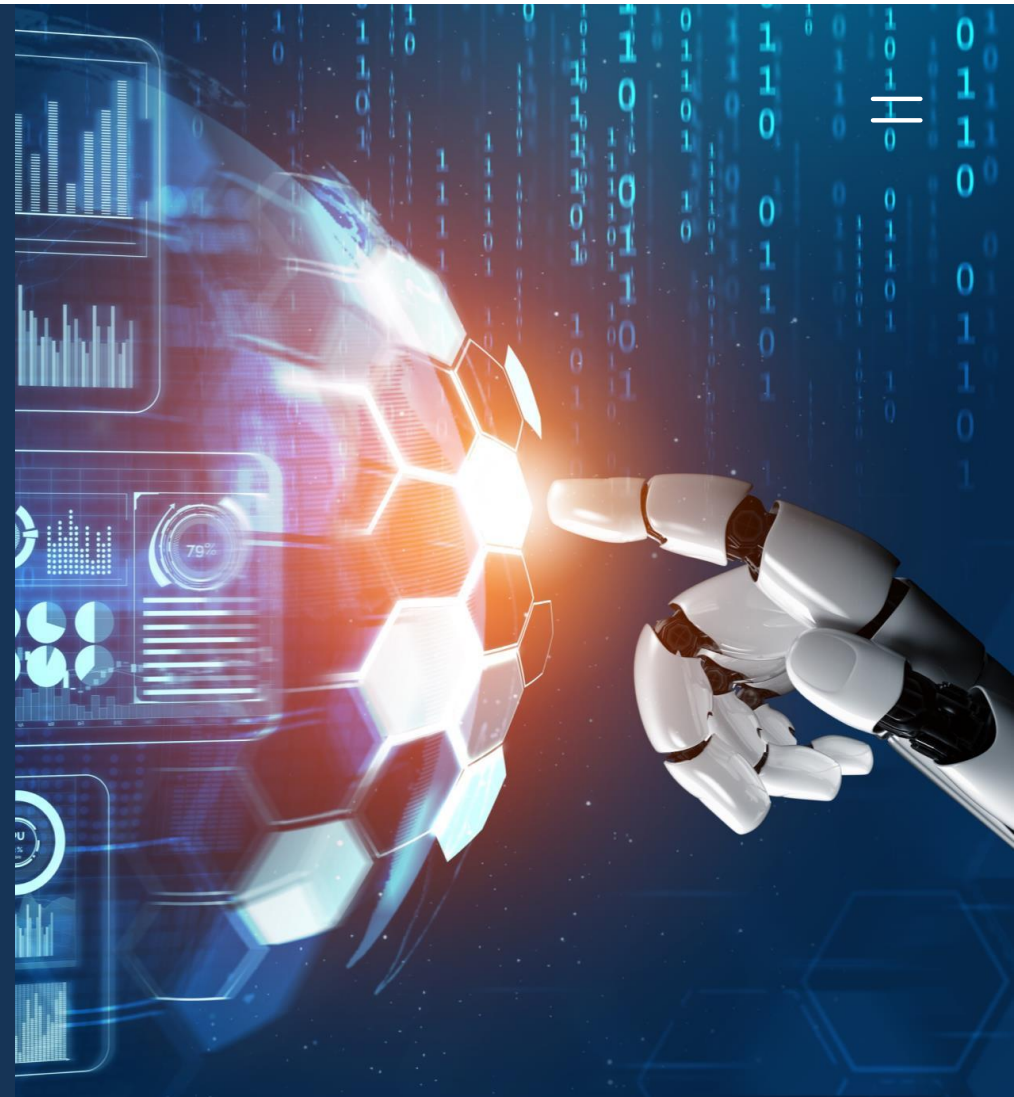
Data Governance

*Stewarding Data,
Serving Mission*

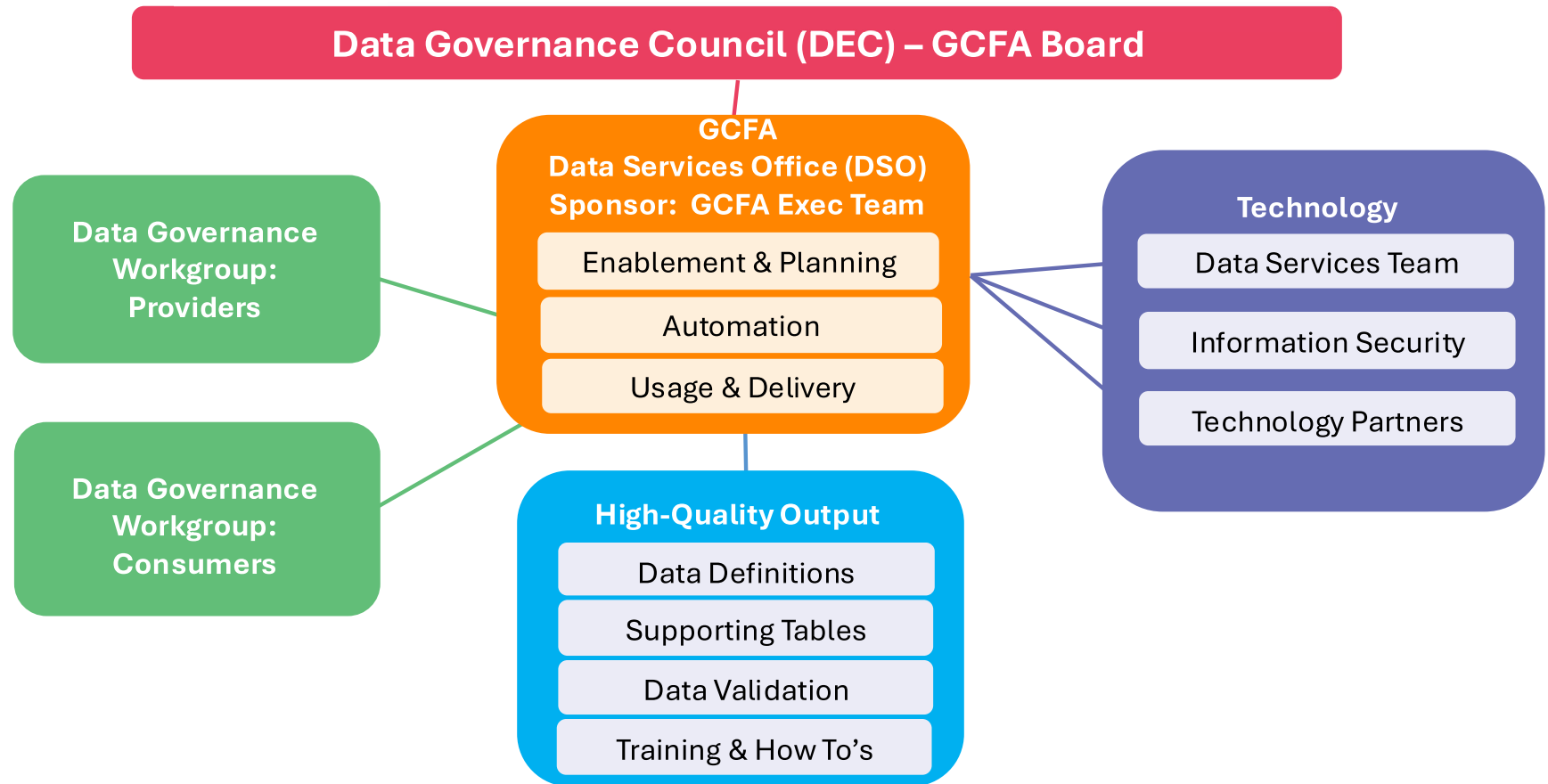


Data Governance

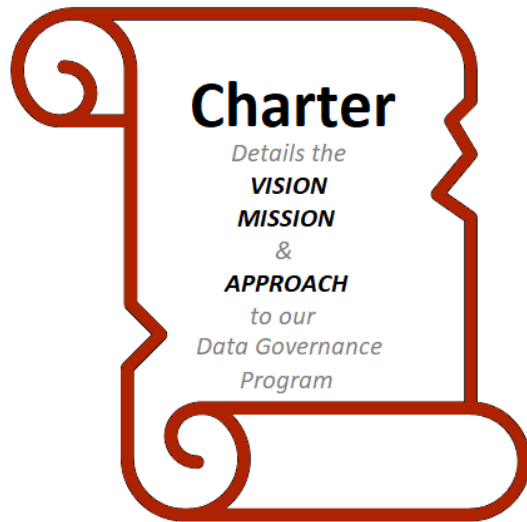
- ✓ Data Governance is a comprehensive framework that outlines the policies, procedures, roles and responsibilities for managing data assets within an organization.
- ✓ GCFA is responsible for overseeing data submission, publishing information, and utilizing the data for various purposes.



WHO: Roles and Responsibilities



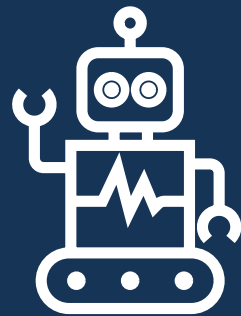
WHAT: Draft Charter



The Charter document will keep GCFA's Data Services Office focused by aligning the priorities with approved Drivers, Goals, and Strategy.

The Data Charter will cover how we interact with UMC partners to include **pivotal** change agents within UMC organizations, driving a profound and permanent shift in how the connection perceives, manages, and leverages data. The Charter is designed to safeguard the UMC's data and offer the most effective path for governance, all while ensuring that the goals are consistently met.

Enablement & Automation





Why Automation

Benefits of Automation:

- Timely:
 - Move from manual mindset to real-time mindset
- Efficiency
 - Reduce manual entry
- Accuracy
 - Reduce mistakes & errors

Using technology to streamline tasks



Automated
Data
Upload



Real-Time
Validation



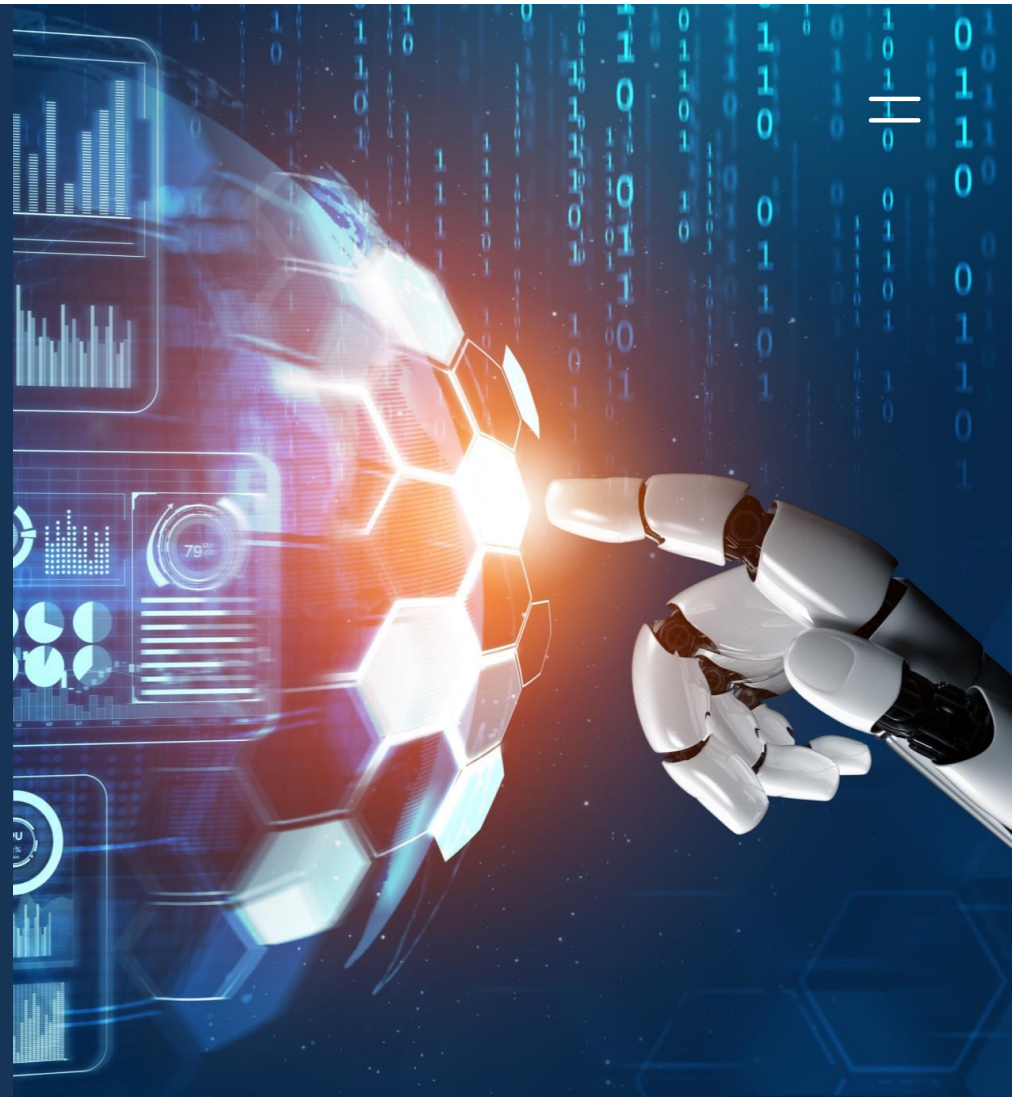
Processing
Tools

Usage & Delivery



Usage & Delivery

- ✓ Not only will GCFA Data Services bring together the vast data of the UMC...
- ✓ But we will also provide tools to the connection so the data can be leveraged for meaningful insights, leading to courageous actions.



Strategic Tools



Self-Service
Dashboard



Barnabas
AI



Advanced
Analysis /
Requests

Next Steps



GCFA Quadrennial Survey Plan

Strengthening Processes Across the
Connection for Better Data Outcomes



What:

GCFA is embarking on an ambitious **four-year** plan to revisit each of our data instruments to survey data providers and consumers to better our processes and outcomes.

Objectives:



Evaluate which processes are used, useful, or causing fatigue across UMC levels (agencies, annual conferences, local churches, bishops, and central conferences).



Streamlined, prioritized, and re-framed statistics process, ready for a **2026 jurisdictional launch** of revamped questions/instrument(s).

Instruments:	Statistical Forms	Appointment	Annual Conference	Business of the
	Tables I, II, and III	Booklets	Journals	Annual Conference

Guiding Principles



Focus on *strategic usefulness* of data

Increase confidence in data output

Ensure alignment with denominational priorities

(e.g., dismantling racism, four areas of focus)

Reduce data fatigue

Collect broad stakeholder feedback across the Connection

GCFA Administrative Updates



Information Security



- Ensuring ALL vendors meet SOC2 security standards
- GCFA technology undergoing SOC2 security certification process
 - (in progress, complete 2026)

Click [here](#) for more information about SOC2

Local Church Audit Guide



- The Audit and Review Committee of GCFA's Board is embarking upon a survey around the Local Church Audit Guide
- Annual Conference Treasurers will receive information about the survey from A&R Committee Chair Rev. William Williams III
- GCFA will be releasing a separate survey for local churches and district superintendents

QUESTION & ANSWER SESSION.





Thank You!



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Appendix: Additional Information

OUTPUTS: for the Organization



We know where
it is introduced
to our
ecosystem.



If a metric, we
display the
calculation.



If derived, we
explain precisely
how it is derived.



If an attribute,
we provide a
robust definition.



We easily
collaborate and get
clarification from
assigned owners
and stewards.



We protect its
privacy and
security.



We publish
complete
definitions.



We manage and
confirm the
quality.



We have
standards for
data's
transportation.

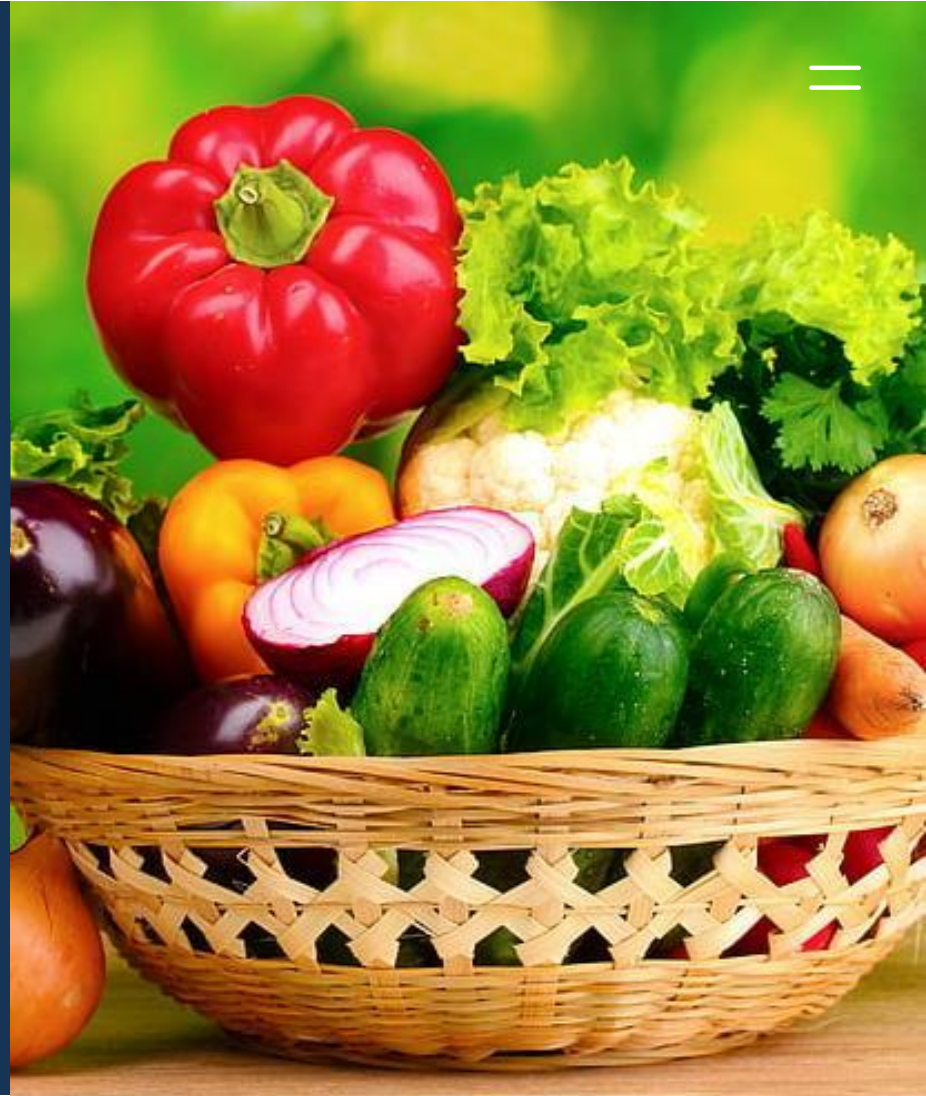


We use data
consistently
between assets.

We make confident decisions with our data.

Data Governance

*Stewarding Data,
Serving Mission*



Data Governance



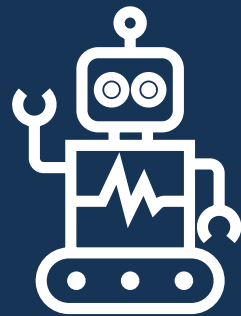
Key Components:

- Who – providers/consumers
- What – clearly defined definitions, supporting tables, documentation & training
- Where – collection methods
- When – move from cyclical to real-time

Benefits

- Improved data quality will lead to confident & trust
- Consistency in our data products
- Risk reduction, improved reputation, regulatory protection and compliance
- Increase efficiency

Enablement & Automation



Goal: Automated Upload

Considerations:

- ✓ Standard file format
- ✓ Authorization
- ✓ Data validation
 - ✓ Pre-upload checks
 - ✓ Format validation
- ✓ Real-time error handling
 - ✓ Retry logic
 - ✓ Alerts
- ✓ Frequency

Current Options:

- ✓ Ticket Submission
- ✓ Manually Validated Non-Standard File Upload
- ✓ Form

Real-Time Validation

Format Validation:

email: user@example.com

date: YYYY-MM-DD

phone: (123) 456-7890

zip code: 33333

Type Validation:

Dollar amounts \$xxx.xx

Range Validation:

Date must not be 99/99/9999

Cross-Field Validation:

Closed churches must have a close date and closure reason

Lookup Validation:

Clergy codes must match GBHEM standards

Custom Rules:

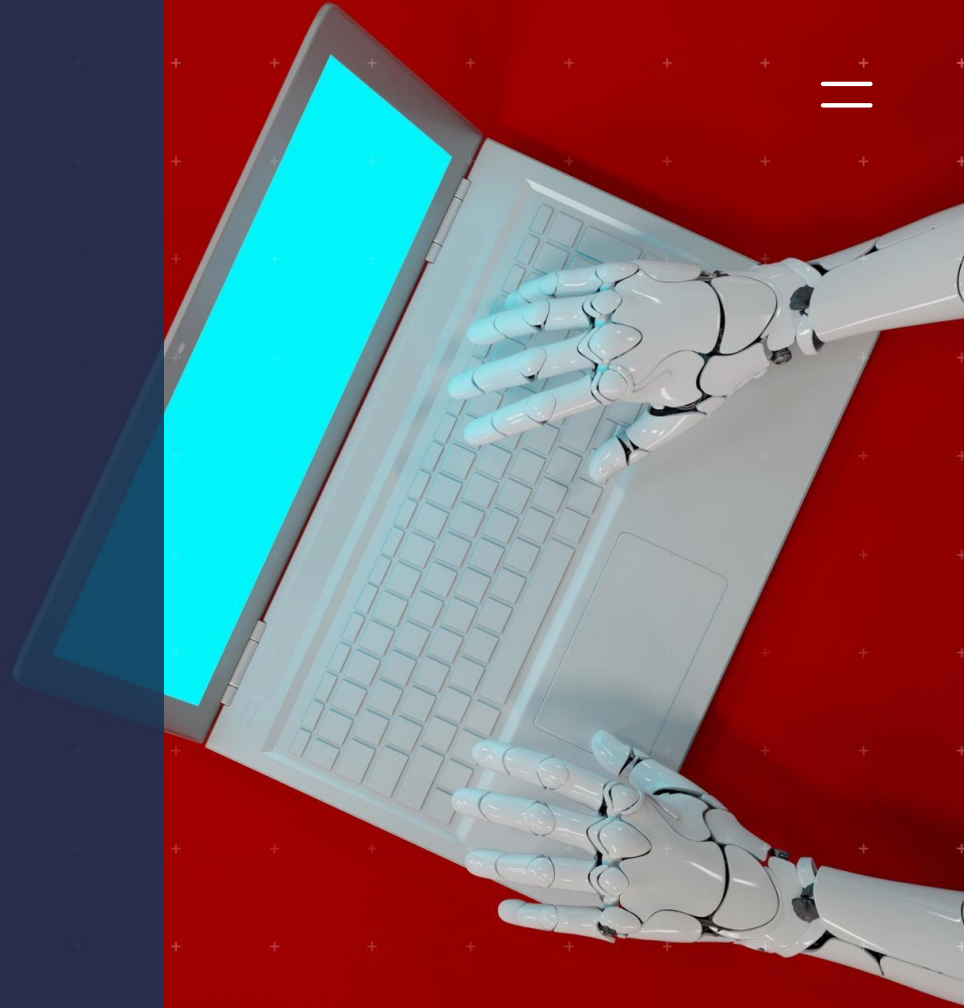
xxx fields cannot be blank



“Real-time” ensures data is validated with an IMMEDIATE feedback loop as it’s entered or uploaded to ensure it is accurate, complete, and conforms to expected formats AT THE POINT OF ENTRY.

Current Processing Tools

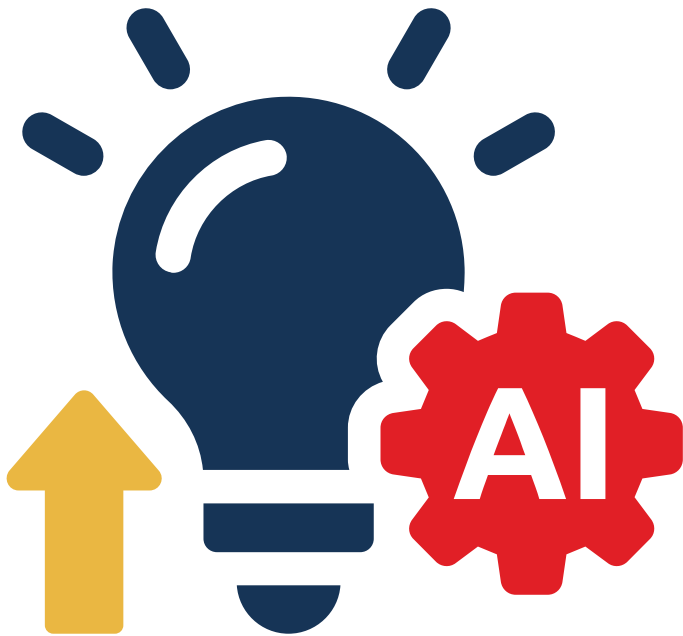
- ✓ Brick River UMC Center
- ✓ Excel Template & Documentation
- ✓ File Transfer Schema



Usage & Delivery



Examples **Of Analytics** In the UMC



Community Analysis

- Identify outreach opportunities
- Targeted programs and resources

Church Engagement

- Website & digital engagement
- Track visitor behavior on church websites

Giving Impact

- Understand giving trends
- Improve stewardship campaigns

Membership Trends

- New member growth and retention
- Attendance trends

Modeling

- Clergy appointment
- District mapping

Usage & **Delivery**



Key Components:

- Data Infrastructure
- Technology Stack
- Talent & Skills
- Organizational Alignment
- Governance & Compliance

The strategic and operational components that empower an organization to effectively leverage data for decision-making, innovation, and performance improvement.

GCFA Denominational Data Sharing Policy

- Last revised 8/13/2020
- Bringing revisions to upcoming GCFA BOD meeting
- General guidance:
 - Summary data available publicly
 - Ensuring data sharing is appropriate based on role

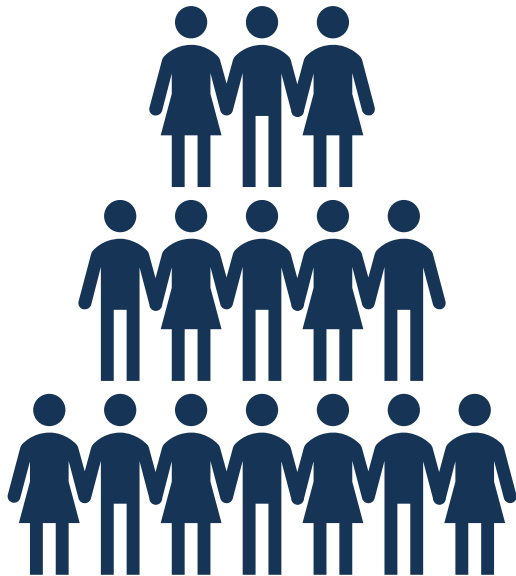
[Reference: Data Sharing Policy](#)

GCFA Quadrennial Survey Plan

Strengthening Processes Across the
Connection for Better Data Outcomes



Survey Audiences



General Agencies

GCFA, GBGM, Discipleship, etc.



Annual Conference Staff

Treasurers, IT, Statisticians

Local Churches

Pastors, administrators, volunteers completing stats forms

Bishops

Jurisdictional & central conferences for high-level pain points

Central Conferences

Specific review for contextual concerns