UMC Data – Data Collected, the Processes, and Uses of Data

UMC SUPPORT

Data Collection Process

The General Council on Finance and Administration of the United Methodist Church (GCFA) is responsible for the collection and maintenance of church data. (*See* **¶¶ 807.14-.16; *Book of Discipline* paragraphs cited herein are reproduced in Appendix 1).** The data is collected from two different sources:

- Local church statistics and financial information **(¶ 807.16)** is submitted by local churches in the United States and from the annual conferences in the central conferences.
- Local church contact information and clergy and church leadership information **(¶¶ 807.14-.15)** is submitted by annual conferences, primarily via the ***Business of the Annual Conference (BAC)*** located in the annual conference journal.

GCFA establishes the forms and data points required for both of the above data collection methods. The processes for each are described in more detail below.

Local Church Statistics and Financial Information

While data points collected in the United States are at the local church level, only conference-wide totals are available in the central conferences, due to technology and infrastructure limitations in many central conference areas. The categories of data collected from the central conferences are also limited. Examples of data collected globally include: membership, average weekly attendance, number of baptisms, and the number of professions of faith. GCFA also collects local church financial data from the Jurisdictions. There are three separate tables that are captured and used throughout the connection.

Table 1	• Membership and Participation
Table 2	• Expenses
Table 3	• Income

Typically, the data collection process is not completed until the 3rd or 4th quarter of the following year. For example, statistics for 2018 will be finalized at GCFA in September or October of 2019. The timeline for the Jurisdictions is as follows: (See Figure 1)

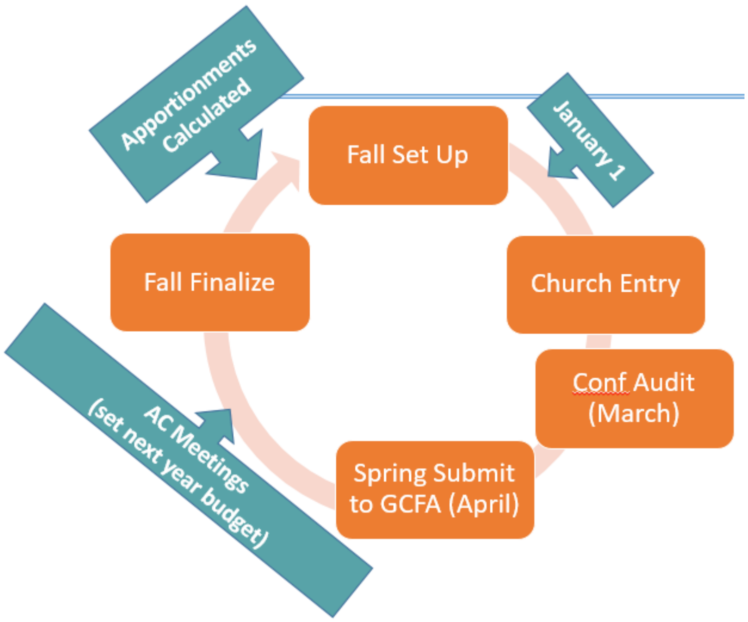

Figure 1

- Local churches submit their data to the annual conferences by **January 30th** or earlier as set by the annual conference and is entered according to the data and table structures provided by GCFA **¶¶ 606.7-.8.**
- The annual conferences then review the data submitted by the local churches and correspond with them on any updates that may need to be made.
- After the annual conference validates the information and is satisfied with its accuracy, a report is submitted to GCFA. GCFA sets a **deadline for submission by April or May**, however, it is usually **July or August** before all conferences have made their initial submissions.
- After the annual conferences submit its reports to GCFA, the data is analyzed and reviewed by GCFA:
    - Validation and correction of anomalies of church records reported in statistics, but do not match GCFA Church Records
    - Generating reports to compare to prior year entries
    - Perform error integrity analyses. Large variances are highlighted for the annual conference to review
    - Compare year-over-year comparisons that are sent to the annual conference for review
    - Return data to the annual conference make any corrections that may have been discovered or they inform GCFA the original submission is accurate. If corrections are made, the conference resubmits to GCFA their final reporting
- After the conference has confirmed its data is final, the statistical end-of-year report is stored in the GCFA enterprise database.
- After all annual conferences have finalized their statistics, reports are produced for all conferences, reviewed by the GCFA Executive Team, distributed to the bishops, and then published on the GCFA website.

In the central conferences, only Table 1 information is obtained. The process is also different than in the jurisdictions. Due to the technology and infrastructure issues previously mentioned, the central conference statistical data is primarily collected from the annual conference journals, but some annual conferences also send in Table 1 information separately.

Business of the Annual Conference:

This data is collected annually from the annual conference journals and includes information such as clergy appointments and information, conference leadership information, local church contact information, etc. as outlined in **¶¶ 807.14-.15.** This data is not used in the calculation of General Conference delegates, the number of bishops, nor in the calculation of annual conference apportionments, but it used mostly by General Agencies and the Council of Bishops for appointment and leadership information

Definition of Membership

Paragraph 215 of *The Book of Discipline* states:

> **The membership of a local United Methodist church shall include all people who have been baptized and all people who have professed their faith.**
> 1. The baptized membership of a local United Methodist church shall include all baptized people who have received Christian baptism in the local congregation or elsewhere, or whose membership has been transferred to the local United Methodist church subsequent to baptism in some other congregation.
> 2. **The professing membership of a local United Methodist church shall include all baptized people who have come into membership by profession of faith through appropriate services of the baptismal covenant in the ritual or by transfer from other churches.**
> 3. **For statistical purposes, church membership is equated to the number of people listed on the roll of professing members**.
> 4. All baptized or professing members of any local United Methodist church are members of the worldwide United Methodist connection and members of the church universal.

What data is used for delegate and bishop counts, and apportionment calculations?

Number of Jurisdictional Bishops:

The formula for jurisdictional bishops is outlined in ¶ 404.2. The only statistic used in this calculation is the number of "church members" in the jurisdiction. The figures used are the most recent figures submitted by annual conferences via the local churches into Table 1 discussed above. The year of this data is the final reporting for the year of General Conference minus two. For example, at the 2020 General Conference, the data presented and used in the calculation will be from 2018, because 2019 data will not yet be finalized, as described in the timeline above. Please note how this contrasts with the

Original publication date: August 28, 2019

period and timing of the data used in the calculation of General Conference delegates below. Also, while the language in 404.2 refers to "church members" not "professing members," 215.3 states "for statistical purposes, church membership is equated to the number of people listed on the roll of professing members." This means the same classification of membership is used in both calculations.

Number of General Conference Delegates (¶ 511.5):

There are two separate statistics used in this calculation. Both are taken from the most recent annual conference journal received by GCFA prior to the deadline for the Secretary of the General Conference to send calculations to the annual conferences. These data points are:

- **"clergy membership"** as defined in **¶ 602 and**
- **"professing members"** as defined in **¶ 215.2**.

For 2020, the delegate calculations were sent to the annual conferences in December 2017. In the jurisdictions, the data came primarily from the 2016 journals, which contain 2015 statistical information. In the central conferences, most of the journals were from a range between 2012 and 2015.

The Central Conference Apportionment Calculation

Central Conference apportionments are calculated using the following formula which is based primarily on professing membership.

A = (J * M)* i
For this calculation:
A represents an annual conference's **general Church apportionment**
J represents the Jurisdictional Apportionments per Professing Member (Based upon most recent Table 1 data of the Jurisdictions. This is typically a 3-year lag (i.e. 2020 apportionments use 2017 Table 1 data)
M represents the **number of Professing Members** (Most recent Table 1 or journal data) in the annual conference
i represents the annual conference's **"Economic Adjustment Factor"**

GCFA Trainings on Data Collection and Journal Completion

GCFA held trainings at Extended Cabinet events, as follows:

- Jurisdictions – October 2016
- Philippines – February 2018
- Africa – February 2018

The training materials were provided in English, French, and Portuguese and covered the following topics relating to data collection:

- Statistical reporting, including the definitions all fields collected (membership, baptisms, etc.)
- Annual Conference Journal Creation Guide.

During the training sessions, the GCFA Data Services Department contact information was provided to all attendees for submission of any additional questions. The training event attendees were primarily annual conference leadership with the intention for them to continue the training within their annual conferences.

Appendix 1 - *Book of Discipline* References

¶ 404.2a-b

2. In the jurisdictions, the number of bishops shall be determined on the following basis:

a) Each jurisdiction having 300,000 church members or fewer shall be entitled to five bishops and each jurisdiction having more than 300,000 church members shall be entitled to one additional bishop for each additional 300,000 church members or major fraction thereof.

b) If the number of church members in a jurisdiction shall have decreased by at least 10 percent below the number of church members which had previously entitled the jurisdiction to its number of bishops, then the number of bishops to which it shall be entitled shall be determined on the basis of missional needs, as approved by the General Conference on the recommendation of the Interjurisdictional Committee on Episcopacy, provided however that said jurisdiction shall be entitled to no less than the number of bishops to which it would be entitled under subparagraph a) above. It shall be the responsibility of the affected jurisdiction, through its Committee on Episcopacy, to request consideration of its missional need for an exception, and in the absence of such a request, there shall be no obligation on the part of the Interjurisdictional Committee on Episcopacy to consider such an exception nor to make any report on such an exception to General Conference. In no case shall there be any constraint on General Conference's power to act in the absence of such a recommendation or to reject any recommendation that might be received.

¶ 502.2

2. The number of delegates to which an annual conference is entitled shall be computed on a two-factor basis: the number of clergy members of the annual conference, and the number of members of local churches in the annual conference.

The term *clergy members* as used in this paragraph shall refer to both active and retired members of the annual conference.

¶ 511.5a-d

5. 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

b) 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

c) A number of lay delegates equal to the total number of clergy delegates authorized as above.

d) Every annual conference shall be entitled to at least one clergy and one lay delegate.

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¶¶ 606.7-.8

7. The local church report to the annual conference shall be submitted on the prescribed forms no later than thirty days following the close of the calendar year. If the annual conference sets an earlier deadline for receiving the reports, the earlier deadline shall apply.

8. Official records of secretaries, statisticians, and treasurers shall be kept according to the forms prepared by the General Council on Finance and Administration so that official statistical and financial items shall be handled alike in all annual conferences and that uniformity of reporting shall be established as a worldwide church policy.

¶¶ 807.14-.16

14. To establish and supervise definitions and policies for general agencies receiving general church funds regarding the collection, processing, and distribution of certain authoritative data of the denomination, such as contact information for local churches, clergy, and leadership of The United Methodist Church, in collaboration with the Council of Bishops and in consultation with the general agencies."

15. To maintain the authoritative database for the general agencies receiving general Church funds (see ¶ 810.2) of the official data of all bishops; ordained and consecrated ministers in effective relation; local pastors, including retired ordained ministers serving charges; charges, local churches, parishes, fellowships, and new church starts; and such lists of General, jurisdictional, and conference boards, commissions, and committees, and officers of same, and of such other officers as the council may determine necessary. No one other than authorized bodies or officers of the Church shall be permitted to use those records.

16. To establish an electronic means that local churches shall use to collect, prepare, and report, in an accurate and timely manner, their statistical information to the council. It shall provide for the distribution of such information to annual conferences, the general planning and research agencies of the Church, and other interested parties. The council may establish an appropriate schedule of fees and charges to defray the cost of such information distribution services.