Conference Yearbook Instructions

It's time again to begin gearing up for the Yearbook! This year will be the first to use the new Data Hub system, <u>UCC Database and Directories</u>, so to make things a little easier, we are highlighting new features or processes in <mark>green</mark>.

CHURCH INFORMATION

Church Instructions

- All church instructions will be posted on the [Yearbook webpage](#) by January 8th, 2025.
- Please review the Church Yearbook Instructions for complete details of the information we ask churches to enter before forwarding them to your churches. You may direct your churches to this webpage or email them a copy of the Church Instructions.
- For your convenience, we have forwarded you a copy of the Church Instructions in Microsoft Word format so you can add or modify them as you need.
- Please tell your churches how you prefer them to contact you with things that need to be corrected in the Data Hub. You may wish to have them send you an email or use the Report Data Discrepancy button within the Data Hub.

Church Forms

- All church data must be submitted to CARDD via the Data Hub (now UCC Database and Directories). You can submit data on your churches' behalf using your account. You do not need to log into their account to enter their data.
- The Church Instructions have a data entry guide on the last several pages. If your churches need a printed form to gather their data or to record and mail to you, please use this.

Church User Accounts

- <mark>Those who currently have an account in the Engage system with a Conference/Association, Ministerial, or Reference role will continue to use that login information in the new system but functionality will grow to include Data Hub access.</mark>
- <mark>New users can create an account by clicking on the appropriate "Sign-up" or "Request Account" buttons below the sign in and following the instructions on the following page (additional details may be found in the Church Instructions page).</mark>
- If a church needs assistance logging into the Data Hub or submitting their data, please help them as you are able to or direct them to instructions available online on the [Yearbook webpage](#). As a backup, CARDD will be offering a Yearbook Help Line. Details are provided in the Church Instructions. Please only send your churches to the Yearbook Help Line when your staff is not available to assist them.
- If you're unable to answer a church's question, we ask that <u>you</u> contact CARDD for assistance. This will ensure you can answer the question when it inevitably comes up with another church.
- If a church is unable to log into the system please try to log in on their behalf, using either the default password or the password they believe they changed it to. If you are unable to access their record, please use the "Forgot Username or Password" function on the login page. If this does not work, contact Evan (penced@ucc.org) for assistance. Please do not direct the church to contact Evan directly.
- Contacting Evan via email typically results in a faster response.

Important Dates for Churches

> **The Data Hub will open to churches at noon on January 22nd and will remain available through March 21st.**

- Please encourage your churches to submit their data before the March 21st deadline as there will not be an extension offered for churches.

- After March 21st, the only way updated church data will be included in the 2025 Yearbook and Directory is if Conference or Association staff enters it.

List of Submitted Reports
- If you would like to know which of your churches have submitted or not submitted a report with their 2024 data, please send an email to Evan (penced@ucc.org).
- This list will include conference church ID#, location, church name, association, total updated membership, and date submitted for all churches. Those that have not yet submitted a membership report for 2024 will not have total membership displayed in the list.

Special Offerings
- You or your finance staff should plan to submit your data file containing your Churches' Special Offerings and Basic Support data to Evan Pence (penced@ucc.org) by March 28th so the files can be reviewed and uploaded on your behalf. Please submit your file as soon as it is ready; do not wait until March 28th if your file is available earlier.
- Evan will work directly with you or your finance staff to ensure your file is in the correct format and includes appropriate information.
- You or your finance staff will receive more detailed information from Evan in late January.

Correcting Data Entry Errors
- You can correct the data your churches have submitted.
- To do so, click on the "Edit" link in the upper right-hand corner of the church's page
- You can also edit a previous year's data if errors are discovered.

Data Checks
- CARDD will run some basic checks of data beginning on April 9th.
- These will be forwarded to you to review and correct by April 24th.
- All issues will need to be resolved in the Data Hub before May 2nd. Please ensure someone will be available to assist with this if needed.
- This will allow us all to be confident of the data we publish in the 2025 Yearbook & Directory.

Church Listing

Please review your entire list of churches to ensure accuracy.

Some items to look for:
- Are all new UCC churches and New Church Starts/Proposed Congregations listed?
- Are all new churches that are the result of a merger added to the Data Hub? Have you added appropriate comments to reflect the merger?
- Are all closed, withdrawn, or merged churches recorded appropriately?
- Do any of your Inactive churches need to be removed?
- Is the ministerial staff listed for each church accurate and up to date?

Inactive Churches
- Attached to your email is a file titled *Inactive Churches (##)*. This file contains your Conference's list of inactive churches. We believe this list needs attention and likely some churches need to be removed. Please take any appropriate action in the Data Hub. (If you do not receive this file you do not have any inactive churches recorded in the Data Hub.)
- An inactive church is a UCC church that is no longer holding worship services but still maintains standing in your Conference or Association for some reason. These are not churches that do not participate in the life of the conference but rather churches that **no longer regularly worship**.

- Please note, churches that have been inactive for more than two years will be removed by CARDD staff. If a church has an inactive date prior to January 1, 2023 but they need to remain please email us at yearbook@ucc.org with the date you expect this church to be ready to be removed. The UCC Board of Directors approved a policy regarding removing inactive churches effective October 21, 2022. (Please see the Conference Yearbook Letter for further details.)
- You will receive a list by April 24th, 2025, of those inactive churches scheduled to be removed on May 5th, 2025.

Non-Reporting Churches
- You will receive a separate email in early January 2025 with a list of churches that have not provided an annual report in any of the past 5 years. (Churches that had their data updated after the Yearbook was published **will be** included in this list.)
- This list is for your convenience to try to reach out to these churches to obtain a report to update their record.
- If they are not able to update their record but can provide you with some key pieces of data, you can update this on their behalf. If you need assistance with this, please reach out to Evan at penced@ucc.org.
- We recommend updating the following fields if available:
    - 2024 Membership (This can be updated by simply using the adjustment field to make the New Total Membership correct.)
    - Worship Attendance
    - Active Participants Youth and Adult Christian Education/Faith Formation
    - Operating Expenses

Withdrawn Churches
- Churches that have withdrawn from the UCC should be recorded as such in the Data Hub upon your receipt of their notification. You should not wait until their association is able to take a vote to recognize this withdrawal.
- The UCC National General Counsel reminds us that paragraph 18 of the UCC Constitution leaves it to the church to make a unilateral decision to join or leave the UCC

> The autonomy of the Local Church is inherent and modifiable only by its own action. Nothing in this Constitution and the Bylaws of the United Church of Christ shall destroy or limit the right of each Local Church to continue to operate in the way customary to it; nor shall be construed as giving to the General Synod, or to any Conference or Association now, or at any future time, the power to abridge or impair the autonomy of any Local Church in the management of its own affairs, which affairs include, but are not limited to, the right to retain or adopt its own methods of organization, worship and education; to retain or secure its own charter and name; to adopt its own constitution and bylaws; to formulate its own covenants and confessions of faith; to admit members in its own way and to provide for their discipline or dismissal; to call or dismiss its pastor or pastors by such procedure as it shall determine; to acquire, own, manage and dispose of property and funds; to control its own benevolences; and to withdraw by its own decision from the United Church of Christ at any time without forfeiture of ownership or control of any real or personal property owned by it.
>
> UCC Constitution – Paragraph 18

Research Questions
- This year we are continuing the supplemental data collection and would like churches to answer a few questions that are not part of the annual Yearbook data collection to help our office plan future research projects.
- A link to this supplemental data collection will be provided on the Data Hub home page for churches. It can be found at https://www.surveymonkey.com/r/2025_supplemental_survey_YB
- The survey is brief and should take less than 15 minutes to complete.
- These additional questions are included in the Church Data Entry Guide (included in the Church Yearbook Instructions) as well.

PEOPLE INFORMATION

- Please confirm all authorized clergy are included and correct within the Data Hub.
- To facilitate these checks, we have attached a CSV file listing all authorized clergy in your conference (these were taken from the People Data report in the old Data Hub).
  - Please note that these contain private information and are for Conference-internal Use only
- Please ensure all who have transferred into or out of your conference in the previous year are accurately reflected.
- Information printed in the Yearbook and Directory includes name, authorization code, specialty code, conference, and Association of standing, year ordained, address (unless opted out), and phone (unless opted out).
- Please be sure all this information is current and accurate by April 8th.
- If you need help with this, please contact Evan at penced@ucc.org.

Necrology

- All authorized clergy who have passed away in the previous year have their ministry recognized in the Yearbook Necrology section.
- For a clergyperson to be included in the Necrology section of the 2025 Yearbook & Directory, you must complete the Necrology section on their record by January 31st.
- Please review "The Necrology Guide" posted on the Resources page for details on completing the Necrology section. If you have specific questions about completing a necrology, please contact Evan Pence at penced@ucc.org.

CONFERENCE & ASSOCIATION PAGES

- The data in the Conference and Association areas of the UCC Database and Directories (i.e., the new Data Hub) will be used to compile these pages.
- Please be sure to review and update all of this information.
- If your incorporated name is different from the Conference Name recorded in the system, it should be added in the "Details" section of the Conference page. This will allow it to be printed in the Yearbook & Directory.
- Please pay special attention to your Staff positions. If the "Position" listing does not adequately describe the person's position, please add a Position Title. If a Position Title is included it will be printed in the Yearbook, otherwise, the "Position" listing will be displayed.
- Please review and update all your Conference and Association records by February 7th. We will be relying on the information provided and will not be sending these to you for additional review.

CONFERENCE FINANCIAL INFORMATION

- We ask that you (or the Conference finance staff person) pay special attention to completing the Conference Finances reporting section. For assistance in completing this section, please see "Conference Finances Tip Sheet" posted on the Yearbook webpage.
- **If your financial staff person should need access to add this information, please contact Evan Pence at penced@ucc.org.**

Helpful Tips

- Create a Data Hub record for any new UCC Churches or Proposed Congregations/New Church Starts before January 22, 2025, to facilitate the creation of their user account in the new system. This will ensure your new churches can submit their report online.
- Review all church materials posted on the Yearbook webpage so you are familiar with them and able to direct your churches to these resources for assistance.
- Determine how best to share all Yearbook materials with your churches. If you need help with your planning, please contact Evan Pence (penced@ucc.org) who can connect you with a Conference Yearbook veteran who will have great tips to share with you.

- Update your church and people records throughout the year so at Yearbook time you are only confirming all changes were made.
- Any time you access an individual's record, we suggest you briefly review all sections to ensure all data is current.
- CARDD will work to ensure the church list published in the Yearbook & Directory is accurate as of December 31, 2024. For example, if a church is removed from your conference in early 2025, and removed from the Database we will add it to the Yearbook listing. Also, if a new church is added to your conference in 2025, we will not include it in your listing of churches in the Yearbook. Please remember the church listing in the Yearbook and Directory reflects December 31, 2024.

Special Notes

- Set deadlines for your churches to enable you to meet our deadlines.
- Please ask your churches to call you with questions. In most cases, you'll be able to answer them. If you're not able to answer them, we ask that you call us for the answer. In this way, you'll be better able to help other churches who might have the same question. It also will help us in managing our workload.
- We are offering to all Conferences a Yearbook Help Line to assist your churches when you are unavailable. The Help Line will be available Monday through Friday from 9:30 am – 3:30 pm (Eastern Time) by calling 216-736-3221. This information is also available in the Church Yearbook Instructions. If you can answer your churches' questions, we ask that you do so and we serve as a backup when they are unable to reach you or you're out of the office. However, if your conference cannot respond to churches in real-time please feel free to direct your churches to the Yearbook Help Line.
- **If you are new to this process and would like to schedule a time to talk so we can walk through all this information, please email Evan at penced@ucc.org. Schedule this time ASAP so we can help you begin this process.**

IMPORTANT DATES	
January 15	UCC Database and Directories (Data Hub) opens for conferences
January 22	UCC Database and Directories (Data Hub) opens for churches at noon, Eastern Time
January 31	All authorized clergy deceased in 2024 should have the Necrology section completed
February 7	Conference & Association information updated in UCC Database and Directories (Data Hub)
March 21	UCC Database and Directories (Data Hub) closes for churches at midnight, Eastern Time
March 28	Conferences' Special Offerings data due to CARDD
April 8	UCC Database and Directories (Data Hub) closes for conference and association users at midnight, Eastern Time ✓ All clergy and church data should be finalized by this date. ✓ Conference Financial Information should be completed. If your fiscal year has not yet ended, please enter this information at the end of your fiscal year.
April 9 – April 23	UCC Database and Directories (Data Hub) closed for checking data (it will be reopened as soon as data processing is completed).
April 24 – May 2	Conferences review and edit data identified by CARDD as potential errors

If you have any questions regarding the Yearbook process, please contact Evan.

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