

Conference Yearbook Instructions

It's time again to begin gearing up for the Yearbook!

CHURCH INFORMATION

Church Instructions

- All church instructions and Data Hub training videos will be posted at http://www.ucc.org/research_yearbook in January 2019.
- Please review the Church Yearbook Instructions for complete details of information we ask churches to complete prior to 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 as you need.

Church Forms

- If you would like your churches to have printed forms, they are available for download at http://www.ucc.org/research_secure_forms. (This link should NOT be shared with your churches.)
- **Do not return these forms to CARD.**
- All church data must be submitted to CARD via the Data Hub. You are able to submit data on your churches' behalf using your account. You do not need to log into their account to enter their data.

Church Data Hub Accounts

- All churches that have a Data Hub record created by January 1, 2019 will have a user account created for the Data Hub.
- The login for all church users is their 5 or 6 digit conference church ID#. You can obtain this number by looking at their Data Hub record or by running a Church Data report in the Data Hub.
- All church passwords will be reset to **password** on January 2nd. Please encourage your churches to change their password and to make note of it.
- If a church needs assistance logging into the Data Hub or submitting their data, please do not direct them to CARD. You should provide assistance as you are able or direct them to video tutorials and instructions available online at http://www.ucc.org/research_yearbook.
- If you're unable to assist them, we ask that you contact CARD for assistance. This will ensure you are able to 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 contact Destiny at hiseyd@ucc.org for assistance. Please do not direct the church to contact me.
- Contacting me via email typically results in a faster response. Church password resets are done as soon as I see the email appear. (Typically within two hours.)

Important Dates for Churches

The Data Hub will be open to churches at noon on January 2nd and will remain available until March 6th.

- Please encourage your churches to submit their data prior to the March 6th deadline as there will not be an extension offered for churches.
- After March 6th, the only way church data will be included in the 2019 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 2018 data please send an email to Destiny (hiseyd@ucc.org).
- This list will include conference church ID#, location, church name, association, total updated membership and date submitted for all churches that have at least submitted a membership report for 2018 as well as a list of churches that have not yet submitted their reports.
- These emails are typically responded to within two hours.

Special Offerings

- You or your finance staff **will not** be uploading your churches' offering data to the Data Hub.
- Your data file should be submitted to Taylor Russell (russellt@ucc.org) by March 4th in order for her to review and upload your file on your behalf. Please submit your file as soon as it is ready; do not wait until March 4th if your file is available earlier.
- Taylor will work directly with you or your finance staff to ensure your file is in the correct format and includes appropriate information.
- Look for information from Taylor on February 4th.

Correcting Data Entry Errors

- You have the ability to correct data your churches have submitted.
- Simply click on Edit beside the row of data that needs to be corrected and correct the data.
- You can also edit a previous year's data if errors are discovered.

Data Checks

- CARD will run some basic checks of data beginning on March 25th.
- These will be forwarded to you to look into on April 1st.
- All issues will need to be resolved by April 5th. 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 2019 Yearbook & Directory.

Church Listing

Please review your entire list of churches to ensure its 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?
- 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 2019 Yearbook Information email is a file titled *Inactive Churches.pdf*. This file is sorted by Conference. Please review your conference's list of inactive churches. There are many churches that have been listed as inactive for several years. We believe this list needs attention and likely some churches need to be removed. Please take any appropriate action 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**.

Research Questions

- This year we are piloting a 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.
- The survey is very brief and should take no longer than 5 minutes to complete.
- These additional questions are included in the Church Data Entry Guide as well.

PEOPLE INFORMATION

- Please confirm all authorized clergy are included and correct within the Data Hub.
- **We suggest you use the People Data Report contained in the Data Hub** if you desire to view all the people information in one place.
- At a minimum, we suggest you run this report and export to Excel to review your list of authorized individuals, their standing, contact information and specialty code information. (The report can be filtered to each type of authorization or all people can be included in one report. It can also be filtered by association.)
- Do not print the report from within the Data Hub as it will span across several pages. Export it to Excel or as a CSV to manipulate in Excel. (Videos and a Best Practices Guide about using reports are available at http://www.ucc.org/research_data-hub.)
- 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 of this information is current and accurate by March 24th.
- If you need help with this, please contact Destiny at hiseyd@ucc.org.

Record Transfer Request

- This is also a good time to review any outstanding record transfers.
- Please review any record transfer requests that show as pending. If there is a thumb up and thumb down, this record transfer request is awaiting your conference's approval.
- If the thumb up and thumb down are not displayed, this is a record transfer request that was made by your conference and is currently awaiting the other conference's approval.
- **A record transfer request should not be initiated (or accepted) until after the standing transfer has been completed by the Committees on Ministry.**
- If the record transfer request is for a non-authorized individual there is no standing transfer that needs to take place; the record transfer request can proceed at any time.

Necrology

- All authorized clergy who have passed away in the previous year have their ministry recognized in the Yearbook Necrology section.
- In order for a clergyperson to be included in the Necrology section of the 2019 Yearbook & Directory you must complete the Necrology tab on their record by January 21st.
- Please review "The Necrology Guide" posted on the Data Hub Resources page for details on completing the Necrology tab. If you have specific questions about completing a necrology please contact Taylor Russell at russellt@ucc.org.

CONFERENCE & ASSOCIATION PAGES

- The data in the Conferences and Associations area of the 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 Data Hub it should be added on the Main Info tab. This will allow it to be printed in the Yearbook & Directory.

- Please pay special attention to your Staff positions. If the Position Description 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 Description will be displayed.
- Please review and update all your Conference and Association records by January 14th. Unlike in previous years we will not be sending you this listing to review. Rather we will be relying on the Data Hub containing accurate information.

CONFERENCE FINANCIAL INFORMATION

- A few years ago we created a new data entry tab in consultation with Conference Ministers and Conference Finance staff to record Conference financial information.
- We ask that you (or the Conference finance staff person) pay special attention to completing this section this year. For assistance in completing this tab, please see "Conference Finances Tip Sheet" posted at http://www.ucc.org/research_secure_forms.
- **If your financial staff person should need access to add this information please contact Taylor Russell at russellt@ucc.org.**

Helpful Tips

- Create a Data Hub record for any new UCC Churches or Proposed Congregations/New Church Starts prior to January 1, 2019 to ensure they have a user account in the Data Hub. This will ensure your new churches are able to submit their report online.
- Review all church materials posted at http://www.ucc.org/research_yearbook so you are familiar with them and able to direct your churches to these resources for assistance.
- Update your church and people records in the Data Hub 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 tabs to ensure all data is current.
- CARD will work to ensure the church list published in the Yearbook & Directory is accurate as of December 31, 2018. For example, if a church is removed from your conference after December 31, 2018 and removed from the Data Hub we will add it in the Yearbook listing. Also, if a new church is added to your conference after December 31, 2018 we will not include it in your listing of churches in the Yearbook. Please remember the church listing in the Yearbook and Directory is a reflection of December 31, 2018.

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 better be able to help other churches who might have the same question. It also will help us in managing our workload. If all churches with questions call us we will be unable to meet our publication deadline.
- **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 me at hiseyd@ucc.org. Schedule this time ASAP so we can help you get this process started.**

IMPORTANT DATES

- **January 1** – Deadline for new churches Data Hub record created
- **January 2** – Data Hub opens for churches at noon
- **January 14** – Conference & Association information updated in the Data Hub
- **January 21** – All authorized clergy deceased in 2018 should have Necrology tab completed
- **March 4** – Conferences Special Offerings data file due to CARD
- **March 6** – Data Hub closes for churches at midnight
- **March 24** – Data Hub closes for conference and association users at midnight
 - 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.
- **March 25 – April 12** – Data Hub closed for processing Yearbook. (Data Hub will likely be reopened early; as soon as data processing is completed we will reopen.)
- **April 1 – 5** – Conferences review and edit data identified by CARD as potential errors

If you have any questions regarding the Yearbook process please feel free to call me at any time.

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