Conference Yearbook Instructions

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

NEW THIS YEAR

Spanish Language resources

- Yearbook instructions and the data entry form, including the supplemental survey, have been translated into Spanish.
- Please feel free to share this resource with any of your Spanish-speaking congregations that may prefer this resource to using the Data Hub.
- The resource directs churches to return the form to CARDD.
    - We will process all forms we receive and forward a copy to you.
    - You will need to process any Church Staff changes reported on these forms.
- If you prefer to have these forms returned to you for processing, please update the instructions with your return address information.
- Translation is being completed on this resource. It will be forwarded to you as soon as it is complete.

CHURCH INFORMATION

Church Instructions

- All church instructions and Data Hub training videos will be posted on the [Yearbook webpage](#) in January 2022.
- Please review the Church Yearbook Instructions for complete details of the information we ask churches to complete 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. 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, posted on the [Yearbook webpage,](#) have a data entry guide on the last few pages. If your churches need a printed form to gather their data or to record and mail to you, please use this.

Church Data Hub Accounts

- All churches that have a Data Hub record created by January 1, 2022, 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 **yearbook** on January 5th. 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 help them as you are able to or direct them to video tutorials and 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 you 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 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 - typically within two hours.

Important Dates for Churches

The Data Hub will be open to churches at noon on January 5th and will remain available until March 2nd.

- Please encourage your churches to submit their data before the March 2nd deadline as there will not be an extension offered for churches.
- After March 2nd, the only way updated church data will be included in the 2022 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 2021 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. Those that have not yet submitted a membership report for 2021 will not have total membership displayed in the list.

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 February 28th for the files to be reviewed and uploaded on your behalf. Please submit your file as soon as it is ready; do not wait until February 28th 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.
- You or your finance staff will receive more detailed information from Taylor in early February.

Correcting Data Entry Errors

- You can correct the 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

- CARDD will run some basic checks of data beginning on March 21st.
- These will be forwarded to you to review and correct on March 28th.
- All issues will need to be resolved in the Data Hub by April 3rd. 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 2022 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? 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
- You will receive a separate email in early January 2022 with a file titled *Inactive Churches.pdf*. 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.
- 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**.

Non-Reporting Churches
- You will receive a separate email in early January 2022 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 Destiny at hiseyd@ucc.org.
- We recommend updating the following fields if available:
  - 2021 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

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/SupplementalSurvey2022.
- The survey is brief and should take less than 10 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.
- **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 it 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.) Please ensure all folks who have transferred into, or out of your conference in the previous year are accurately reflected.
- 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 on the Data Hub Info webpage.)
- 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 March 20th.
- If you need help with this, please contact Destiny at hiseyd@ucc.org.

Record Transfer Request

- This is also a good time to review all outstanding record transfers.
- Please review any record transfer requests that show as pending. If there is a thumb up and a 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.
- For a clergyperson to be included in the Necrology section of the 2022 Yearbook & Directory, you must complete the Necrology tab on their record by January 18th.
- 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 21st. We will be relying on the Data Hub containing accurate information and will not send these to you for review.

CONFERENCE FINANCIAL INFORMATION

- We ask that you (or the Conference finance staff person) pay special attention to completing the Conference Finances tab in the Data Hub. For assistance in completing this tab, 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 Taylor Russell at russellt@ucc.org.**

Helpful Tips

- Create a Data Hub record for any new UCC Churches or Proposed Congregations/New Church Starts before January 1, 2022, to ensure they have a user account in the Data Hub. 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 Destiny (hiseyd@ucc.org). I can connect you with a Conference Yearbook veteran who will have great tips to share with you.
- 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.

- CARDD will work to ensure the church list published in the Yearbook & Directory is accurate as of December 31, 2021. For example, if a church is removed from your conference after December 31, 2021, and removed from the Data Hub we will add it to the Yearbook listing. Also, if a new church is added to your conference after December 31, 2021, 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, 2021.

Special Notes

- The Definitions Tip Sheet has been renamed Data Hub Field Guide.
- 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.
- 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 am – 3:30 pm (Eastern Time) by calling 216-736-3837. 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 me at hiseyd@ucc.org. Schedule this time ASAP so we can help you begin this process.**

IMPORTANT DATES	
January 1	Deadline for new churches' Data Hub records created
January 5	Data Hub opens for churches at noon (Eastern Time)
January 21	Conference & Association information updated in Data Hub
January 18	All authorized clergy deceased in 2021 should have the Necrology tab completed
February 28	Conferences' Special Offerings data due to CARDD
March 2	Data Hub closes for churches at midnight (Eastern Time)
March 20	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.
March 21 – 27	Data Hub closed for checking data (Data Hub will be reopened as soon as data processing is completed).
March 28 – April 3	Conferences review and edit data identified by CARDD as potential errors
April 4	Data Hub closed for all users for CARDD to process and publish data

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

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