



# IOWA ANNUAL CONFERENCE



## TREASURY NOTES

**MAY 2008**

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### **Consultants Report**

As reported at the 2007 Annual Conference Session, the Council on Finance and Administration had engaged a consultant to review the work flow and systems of the Conference Treasurer's office. The last time this review was done was around 1994-95. Of course, since then systems, technology, accounting standards, employment laws, health and welfare benefits have all changed. In this edition I've summarized the findings of the consultant team. In next month's edition I will list the recommendations of the consultant. There will be no actions required at this year's annual conference regarding this report.

It is important to note that the consultant interviewed each member of the Administrative Services Staff, reviewed the policies and procedures manual, reviewed job descriptions for each staff member, reviewed personality profiles submitted by the staff, documented accounting procedures, completed an analysis of the software systems, interviewed a number of other conference staff and volunteer users of the services. The interviews were conducted between October-December of 2007. The review of the procedures and software began shortly after the 2007 Annual Conference and continued through the end of the year.

A report was given to the Council on Finance and Administration at their February meeting with more review occurring at the March meeting. Also, during the spring other Boards that work very closely with Administrative Services are in the process of reviewing aspects of the report that is part of their responsibility.

A summary of the findings can be divided into Information Systems, Staffing Structure and Management and some Key Issues.

First: On Information Systems, the conference is currently using a custom written Oracle based system, third party systems, and numerous manually maintained spreadsheets to maintain

IACUMC's financial data and other related data. Although the system is continually being updated all changes and requests are being funneled through a two person IT staff which can result in delays.

In addition, users do not always have the ability to create their own reports or queries. Thus, they are spending a great amount of time re-entering data into spreadsheets to produce the organization's data and financial reports. So despite staff members working at their roles diligently, they are hampered by the system's shortcomings.

These shortcomings have resulted in systems that may not interact with each other. They have been developed in-house and require in-house programming, have minimal documentation, and in some instances staff cannot provide timely and easy to understand financial information.

Second, the staffing of Administrative Services has many strengths, among them are the fact that the "staff has a sincere willingness to meet changing customer (clergy, district, offices, church staff) technology and information needs." The staff members are "very knowledgeable, skilled and experienced. The majority have more than 10 years of experience with the IACUMC." They are committed to the mission of the conference and have shown flexibility in working with the conference agency's unique requirements. However, the complexity of some employment laws, benefit regulations and the number of full and part-time staff that are employed within the conference (includes camps) is requiring more staff time being taken up with Human Resource issues and compliance to regulations.

Some of the Key Issues that need to be addressed include the following. (1) Constructing the right organizational structure within Administrative Services so the group can better clarify roles and responsibility to make the most efficient use of the current staff. (2) More requests for information from conference agencies and volunteers and other employees are putting an additional burden on

some staff. (3) Upgrading technology capabilities where it's currently lacking in some capacity to do certain useful functions can cause excess work for the staff. (4) Workloads among the staff are not always distributed evenly especially during certain times of the year. (5) The limited staff with need for segregation of duties and some current workloads means that when some staff members are away from the office their work is not done and waits for their return.

In the next issue I will summarize the recommendations of the consultant to help Administrative Services move forward in productivity and efficiencies

### Receipts for April

	2007	4YR AVG	2008
<b>General Church</b>	427,863 18.50%	428,405 18.64%	742,141 30.51%
<b>Conference Ministries</b>	2,118,203 20.93%	2,100,831 21.29%	2,076,811 20.54%
<b>Conference Missions</b>	527,112 17.75%	501,782 17.74%	608,295 19.41%
<b>Total Apportionments</b>	<b>3,073,178 19.95%</b>	<b>3,031,018 20.22%</b>	<b>3,427,247 21.86%</b>

Thank you again for the efforts so many of you are making to pay your part of the shared ministry of the United Methodist Church. I want to especially thank those congregations that are so faithful in paying 1/12 of their apportionments each month. Also, for this year we have received \$351,293 for previous year's apportionments. Thanks to all congregations who are making such a faithful effort to be a connected church through our giving and common mission to the world wide United Methodist Church.

### Did You Know?

According to a report our office received from the General church, out of every \$1,000 placed in an offering plate \$854 or 85.4% stays within that local church to support its ministry and mission. The Annual Conference receives for all causes \$124 or 12.4% and the General (*National*) and World wide Church receives \$22 or 2.2%. Over the last number of quadrenniums, these percentages and dollars have not changed more than a few tenths of a percent with the Annual Conference and General church share decreasing.

### Benefit Information for Moving Clergy

Our office is sending out the benefit packets for clergy moving to their new appointment in the Conference. It is important that the pension forms

be completed. All moving Clergy must complete a new Before Tax and After-Tax Contributions Agreement form if you participate or wish to participate in UMPIP. Your salary paying unit needs to sign this form and keep the original for their file. There is also a change form which you will need to complete and send back to our office in the envelope provided to you in the mailing. In order for your new church to be billed on July 1 appropriately, we must have this information to give to the General Board of Pensions no later than June 1. It is very important for you to complete any change forms for the HSA, HRA or Flex spending accounts so that Kabel Business can be notified of your new church and change amounts if applicable. Also, a group application for health insurance has been enclosed in the packets for our office to notify Wellmark Blue Cross Blue Shield of your home address change. Clergy who are being appointed for the first time will receive a complete packet with additional forms. If you have questions regarding any of this information, please contact Betty Palmer at 515-974-8921 or [betty.palmer@iaumc.org](mailto:betty.palmer@iaumc.org).

### 2008 Journal Order Forms

The form to order the 2008 Journal can be found in the Pre-Conference packet or on the Conference's website [www.iaumc.org](http://www.iaumc.org) by clicking on 2008 Annual Conference or searching for "Journal Order Form." Journals are \$15.00 each and CDs are \$7.00 each.

Just a reminder the **deadline** for orders to be in is **June 8, 2008**, however, the process works best if you can mail in your order ahead of annual conference. All orders must be accompanied by payment. **Please DO NOT mail your orders to the lock box** but mail to the address on the order form. Thank you.

If you have questions please contact: Jill Stanton at [Jill.Stanton@iaumc.org](mailto:Jill.Stanton@iaumc.org) or call 515-974-8917.

### Conference Office Closed

The Conference Offices will be closed Monday, May 26 for Memorial Day.

### Conference Center Hours During Annual Conference

During the Annual Conference Session, which is held at Hilton Coliseum on the campus of Iowa State University from Thursday, June 5 through Sunday, June 8, the Conference Center switchboard and office will be closed on Friday. However, there will be some staff in the IUM Foundation and Camp Registrar's office on Thursday and Friday. You may reach them by using their direct phone number.