

## 2019-2020 Church and Treasurer Information

Here is a listing of information, names, responsibilities, print resources, and websites that we hope will be helpful to you. **Please share this information with the pastor, treasurer, finance chair, and anyone else who might find it helpful.**

### **This packet contains:**

- General information
- Contact information for conference staff
- Overview of some conference services
- Other sources of information

### ***Your church number is your GCFA number***

Your church number is your six-digit GCFA number. Find this number on your monthly remittance statements, on your apportionment calculations, and in the journal where the Table Data is listed.

### ***Districts***

The current districts are Big Waters (BW), North Star (NS), River Valley (RV), Southern Prairie (SP), and Twin Cities (TC).

### ***Mailing to the conference office***

The conference office mailing address is the physical address (122 W. Franklin Avenue Suite 400, Minneapolis, MN 55404). Please send all correspondence to this address. Please write on the envelope the person or department who should get the correspondence (Camping, Annual Conference, Twin Cities District Superintendent, etc.). Letters addressed simply to "Minnesota Annual Conference" need to be opened and looked at to determine who should receive it.

### **Apportionments, Advance Specials, Benevolences, Communications, Camping Registrations, Event Registrations, and Workers' Compensation**

Please send these to the conference office and **mark on the envelope who or what it is for** (Finance Office, Communications, Camping, Annual Conference, etc.).

Minnesota Annual Conference of the United Methodist Church  
Attention: \_\_\_\_\_  
122 W Franklin Avenue, Suite 400  
Minneapolis, MN 55404

**NOTE: The Conference has eliminated the lockbox service through the bank.**

### ***Contact Information***

#### **Annual Conference Office**

122 W Franklin Avenue Suite 400, Minneapolis, MN 55404  
612-870-0058 (phone) 612-870-1260 (fax) [www.minnesotaumc.org](http://www.minnesotaumc.org)

#### **Annual Conference Finance and Administration Office Staff**

Barb Brower, Director of Finance and Administration, (612) 230-6135, [barbara.brower@minnesotaumc.org](mailto:barbara.brower@minnesotaumc.org).  
Questions on annual conference budgets, financial statements, risk management, general tax or legal information, substantiating donor contributions.

Jean Edin, Benefits Officer, (612) 230-6136, [jean.edin@minnesotaumc.org](mailto:jean.edin@minnesotaumc.org). Questions on pension benefits, medical benefits, HealthFlex Exchange, pastor's compensation forms.

Kathleen Keller, Controller, (612) 230-6127, [kathleen.keller@minnesotaumc.org](mailto:kathleen.keller@minnesotaumc.org). Financial statements, banking, and insurance.

Linda Miller, Benefits Assistant, (612) 230-6142, [linda.miller@minnesotaumc.org](mailto:linda.miller@minnesotaumc.org). Questions on benefits and forms.

Lisa Schultze, Assistant Controller /Database Manager, (612) 230-6138, [lisa.schultze@minnesotaumc.org](mailto:lisa.schultze@minnesotaumc.org). Questions on Tables I, II, & III; apportionment calculations; apportionments paid; prior year's unpaid apportionments; workers' compensation billings. Also providing information from the Table Data.

Kim Schmidt, Senior Accountant, (612) 230-6140, [kim.schmidt@minnesotaumc.org](mailto:kim.schmidt@minnesotaumc.org). Set up EFT for apportionment payments.

Jill Williamson, Accounting & Database Assistant, (612) 230-6141, [jill.williamson@minnesotaumc.org](mailto:jill.williamson@minnesotaumc.org). Jill handles questions on remittances, special askings, RRR, etc.

#### **Annual Conference program staff**

Janet Beard, Conference Secretary, (612) 230-6156, [janet.beard@minnesotaumc.org](mailto:janet.beard@minnesotaumc.org). Janet prepares the Annual Conference Journal.

Cindy Gregorson, Director of Ministries, (612) 230-6143, [cindy.gregorson@minnesotaumc.org](mailto:cindy.gregorson@minnesotaumc.org). Congregational transformational processes, Annual Conference Session, ministry teams and elected leader questions.

Karla Hovde, Communications Specialist, (612) 230-6139, [karla.hovde@minnesotaumc.org](mailto:karla.hovde@minnesotaumc.org).

Ben Ingebretson, Area Director of New Church Development, (616) 481-7566, [ben.ingebretson@dkmnareaumc.org](mailto:ben.ingebretson@dkmnareaumc.org). New church development questions.

Christa Meland, Director of Communications, (612) 230-6132, [christa.meland@minnesotaumc.org](mailto:christa.meland@minnesotaumc.org). Communications and website questions.

Diane Owen, Lilly Grant Program Director, (612) 230-6129, [diane.owen@dkmnareaumc.org](mailto:diane.owen@dkmnareaumc.org).

Keith Shew, Area Director of Camping & Retreats for Dakotas-Minnesota Area, (612) 230-6130, [keith.shew@dkmnareaumc.org](mailto:keith.shew@dkmnareaumc.org). Camping questions or issues.

Jody Thone, Director of Leadership Development, (612) 230-6134, [jody.thone@minnesotaumc.org](mailto:jody.thone@minnesotaumc.org). Eli Project, Clergy Academy, Soul Leaders, and other leadership training and development.

Lyndy Zabel, Director of Missional Impact, (612) 230-6124, [lyndy.zabel@minnesotaumc.org](mailto:lyndy.zabel@minnesotaumc.org). Ministries of compassion and justice such as Volunteers in Mission, Church School Partnership, Mission Promotion Team, etc.

#### **Annual Conference support staff**

Linda Bowers, Receptionist and Area Camping Assistant, (612) 230-6126, [linda.bowers@dkmnareaumc.org](mailto:linda.bowers@dkmnareaumc.org).

Stacey Edwards, Area Camp and Retreat Coordinator, (612) 230-6131, [stacey.edwards@dkmnareaumc.org](mailto:stacey.edwards@dkmnareaumc.org). Questions on camp registrations, general camperships, and camperships for specific people or camps; leading camps; and camp programs.

Gail Johnson, Administrative Assistant for Congregational Development and Events Coordinator, (612) 230-6125, [gail.johnson@minnesotaumc.org](mailto:gail.johnson@minnesotaumc.org). Registration and logistics for annual conference session, training opportunities, and other events as well as administrative support for Congregational Development.

Heidi Heller, Archives/History, (612) 230-6149, [Heidi.heller@minnesotaumc.org](mailto:Heidi.heller@minnesotaumc.org). Information on what records to keep, how long to keep them, and church history. An updated [Records Retention Schedule may be found on the conference website](#).

Laura Miles, Office and Technology Coordinator, (612) 230-6123, [laura.miles@minnesotaumc.org](mailto:laura.miles@minnesotaumc.org).

## ***Apportionments, Special Sunday Offerings, Special Askings, Advance Specials, Other Benevolences***

Contact Jill Williamson at [jill.williamson@minnesotaumc.org](mailto:jill.williamson@minnesotaumc.org) or (612) 230-6141.

When sending apportionments and other remittance monies, please list the apportionment amounts on the remittance form or spreadsheet provided on our website.

**Remittances for disaster relief** please designate the intended use of the money rather than trying to find an exact Advance number. For example, remit funds on the 2020 remittance form and designate an event like “Ebola Emergency”, “Typhoon Haiyan Relief”, etc. We receive instructions from UMCOR and will make sure your donations are credited properly.

**Please do not** send monies directly overseas! Many countries do not have the infrastructure that allows groups to cash a check, even if it gets to them. Sending monies through General Advances ensures that your gift is safely received.

**Note:** Apportionments, Special Sunday offerings, special askings, advance specials, other benevolences, and pension, medical, and workers’ compensation payments can be included on a single remittance form and a single check. Two or more months of apportionments can be included on a single remittance form with a single check. Payments should be sent to: Minnesota Annual Conference of the UMC, 122 West Franklin Suite 400 Minneapolis MN 55404-2453

**Payee name on remittance checks:** Checks sent to 122 W Franklin should always **be made payable to Minnesota Annual Conference UMC**. We deposit them into our bank account so it is helpful that the “Pay to the Order of” line match our account name. **The bank returns all checks not made out to Minnesota Annual Conference UMC.**

## **Apportionment Remittances Through Electronic Funds Transfer**

If you would like to make monthly payments of apportionments automatically through electronic funds transfer (EFT), please contact Kim Schmidt, Senior Accountant, at [kim.schmidt@minnesotaumc.org](mailto:kim.schmidt@minnesotaumc.org) or (612) 230-6140 to obtain the forms.

## **Apportionment, Statement, And Table Information On The Web**

[This information can be found on the conference website here](#). (No login needed.) In the search box, type your church name and hit enter. A listing of churches will appear below the search box. Click on your church name.

Here you will find:

- Your latest monthly statement
- This year’s final apportionment or next year’s estimated apportionment
- A ten-year table history
- Last year’s financial statement

The monthly newsletters are also archived on the website. [View Finance and Administration e-newsletters here.](#)

### ***Pension & Medical Benefits***

Contact the benefits officer, Jean Edin, at [jean.edin@minnesotaumc.org](mailto:jean.edin@minnesotaumc.org) or (612) 230-6136.

Churches that pay by direct billing can use the forms printed on yellow sheets with a yellow return envelope. These payments may be included on the remittance form with the remittance payment. Whether paid separately or with the remittance form, **please include** the yellow return sheet and indicate specifically what is being paid so we can record it correctly. Churches interested in paying by ACH should contact Jean Edin.

### **Flex Spending & Medical, Dependent Care or Health Savings Account**

Contact the benefits Officer, Jean Edin, at [jean.edin@minnesotaumc.org](mailto:jean.edin@minnesotaumc.org) or (612) 230-6136.

If a clergy enrolls for this benefit, the amount is automatically withdrawn from the church account and the clergy's salary is reduced as a pre-tax payroll deduction. The ACH is identified as SELECT ACT.

### **Workers' Compensation**

Contact Lisa Schultze at [lisa.schultze@minnesotaumc.org](mailto:lisa.schultze@minnesotaumc.org) or (612) 230-6138 for billing questions. Contact Church Mutual (800-554-2642) directly for claims. The address is Church Mutual Insurance Company, 3000 Schuster Lane, PO Box 357, Merrill, WI 54452-0357.

If you carry Workers' Compensation through the conference group policy with Church Mutual Insurance, the bills are sent with a green return envelope enclosed. Payments may be included on the remittance form. Whether returning the workers' comp payment separately or enclosing it with the remittance form, please **INCLUDE** the bottom portion only of the statement. Mail payments to: Minnesota Annual Conference of the UMC, 122 West Franklin Suite 400, Minneapolis MN 55404-2453.

Church Mutual bills the conference office for the entire premium amount. The conference then bills the participating churches for a portion of the premium. Bills generally are sent in February and are due April 15. If the church has other policies with Church Mutual, the workers' comp payment should still be sent to the Minnesota Annual Conference of the UMC, 122 West Franklin Suite 400, Minneapolis MN 55404-2453.

Please note that all churches **ARE** required to carry workers' compensation insurance for all paid staff, but churches are **NOT** required to carry it through the conference umbrella policy with Church Mutual. You may obtain workers' compensation elsewhere.

### ***Camp & Retreat Programs – Camp Minnesota***

Contact the camping office: Stacey Edwards or Linda Bowers at [camps@campminnesota.org](mailto:camps@campminnesota.org) or at (612) 230-2267.

The Camp & Retreat Ministry oversees the programs listed in the camping brochures for Koronis Ministries, Northern Pines, Kowakan Ministries, general campership fund, and camperships for specific people or camping events. It does **not** oversee confirmation gatherings, annual conference registrations, or annual conference training events (see EVENTS). To find out more, visit [www.campminnesota.org](http://www.campminnesota.org).

**Please** include your church name, the camp number, and who the check is for (if it is for more than one person, **please** list each name, the camp number, and the amount for each person). **Please** include contact information in case questions arise.

Donations to specific campsites or camping ministries can be sent directly to the camping office or can be included on your regular remittance form. Please note the specific site, project, or ministry to which the gift is to be given.

## **Events**

Contact the Events Coordinator, Gail Johnson, at [gail.johnson@minnesotaumc.org](mailto:gail.johnson@minnesotaumc.org) or (612) 230-6125.

Events include confirmation gatherings, annual conference registrations, and annual conference training events. It does **not** include camps, or camperships (see CAMP & RETREAT PROGRAMS – CAMP MINNESOTA). [To find or register for a conference event, click here.](#) Find the event and click on it to bring up the registration page.

[To publicize your event, click here and submit an event ad.](#) Every week Minnesota United Methodist congregations will receive an MN Bulletin Board email listing all the new classifieds entries.

## **Youth Ministries And Events**

Contact Catie Levenick and Sami Tierney at [youth@minnesotaumc.org](mailto:youth@minnesotaumc.org).

## **Congregational Development**

Contact congregational development at [congregational.development@minnesotaumc.org](mailto:congregational.development@minnesotaumc.org) or 612-870-0058. Director Ben Ingebretson or his assistant Gail Johnson will respond. Congregational development can provide demographic information resources for your ministry area and training opportunities for existing and new ministries and local church re-development. Congregational development also accepts grant requests for starting new faith communities, new outreach ministries, and Investing in Congregations grants.

## **Record Keeping And Archives**

Contact the conference archivist, Heidi Heller, at [Heidi.heller@minnesotaumc.org](mailto:Heidi.heller@minnesotaumc.org) or (612) 230-6149. Heidi can direct you to resources to help you organize your church history and archives.

For information on records management (which records your church should keep and how long), [a records retention schedule is available on the conference website.](#) Additional information can be found on the website of [the General Commission on Archives and History.](#)

## **Communications**

### **Conference Journal**

The Official Journal and Yearbook of the Minnesota Annual Conference is distributed to churches each year in September. [It is also available online here.](#) The Journal is the official source for conference minutes, reports, memoirs, rules, statistics, and directories. Additional print copies and CD copies may be purchased by contacting Janet Beard at (612) 230-6156 or [janet.beard@minnesotaumc.org](mailto:janet.beard@minnesotaumc.org).

### **Conference Website**

[www.minnesotaumc.org](http://www.minnesotaumc.org) has resources for church treasurers, mission committee chair people, discipleship leaders, worship leaders, Christian educators, and other active church members. It also lists Minnesota church names and addresses and much more information. Find Tables I, II, and III and many other forms by choosing the Administration tab found on the home page, then choosing Forms from the drop down menu.

### **Conference E-mail List**

The conference e-mail list carries the official information of the Minnesota Annual Conference. Anyone may join the list at no charge. Visit [www.minnesotaumc.org](http://www.minnesotaumc.org) and fill out the “Subscribe to our newsletters” box on the home page.

## **MN Connect**

This electronic newsletter, e-mailed every Thursday, features timely announcements of interest to church treasurers, secretaries, staff, and all United Methodists across Minnesota. It is mailed to the annual conference e-mail list. All churches are required to be on this list. Anyone else may subscribe at no charge. To add your name to the e-mail list, visit [www.minnesotaumc.org](http://www.minnesotaumc.org) and fill out the "Subscribe to our newsletters" box on the home page.

## **MN Bulletin Board**

Your church may communicate its events, items available for sale or give-away, positions available, and other announcements using the [classified ads](#) section of the annual conference website. All new items posted in a given week will be featured in the electronic newsletter, MN Bulletin Board, which is distributed to the conference e-mail list every Tuesday. [To include your church announcement, submit an ad here.](#)

**PAUMCS (Professional Association of United Methodist Church Secretaries):** Have questions on how to deal with membership records? Wonder what software other churches are using? Want to find out what other church staff are doing? PAUMCS is the group in the know! This organization of church staff (paid, volunteer, past, and present) provides mutual support and opportunities for continuing education and spiritual growth to their members. Become linked with other United Methodist church staff around the state and around the world. Share knowledge and learn from others in similar situations. Attend continuing education workshops. Make friends with other United Methodist church staff from around the state. Is it worth \$15 per year to have all this expertise readily available? How about \$25 for two members? Contact the Minnesota chapter of PAUMCS at [mncpaumcs@gmail.com](mailto:mncpaumcs@gmail.com) for more information or [visit the PAUMCS webpage.](#)

## **The Ministry Lab (formerly Resource Center for Churches)**

Lizabeth Bougie, Director, [director@rcc-mn.org](mailto:director@rcc-mn.org)  
612-870-0861 (metro); 888-293-9901 (toll free, greater MN)  
Website: [www.rcc-mn.org](http://www.rcc-mn.org)

The Ministry Lab is your partner in ministry, providing audio-visual media and equipment (LCD projector), print, and manipulative (canvas labyrinths, parachute, etc.) resources; guidance and counseling in the use of resources; and access to a network of resource persons and programs for congregational and leadership development. An online catalog of resources available for loan can be found at [www.rcc-mn.org](http://www.rcc-mn.org). Resources can be reserved by phone, by email, or in person and can either be shipped or picked up in person.

## **INFOSERV**

web: [www.infoserv.umc.org](http://www.infoserv.umc.org) email: [infoserv@umcom.umc.org](mailto:infoserv@umcom.umc.org)

United Methodist Information Service. The friendly folk at InfoServ can answer almost any question you can think of about the United Methodist Church and they would love to assist you.

## ***Print Resources for The Church Treasurer***

2016-2020 Legal Manual, General Council on Finance and Administration, The United Methodist Church, is [available here.](#)

2017-2020 United Methodist Church Financial Records Handbook, published by The United Methodist Publishing House, is [available from Cokesbury here.](#)

Church and Clergy Tax Guide, by Richard R. Hammar, annual update usually available in January by calling 1-877-247-4787. Search the site for "Tax Guide".

## **Local Church Audit Guide**

A Church Audit Guide is available from the General Council on Finance and Administration (GCFA). [Click here to read, print, or save it.](#)

### ***Print Resources for the Membership Secretary***

2017-2020 United Methodist Records Manual, published by The United Methodist Publishing House, [available from Cokesbury here.](#)

### **Safe Gatherings**

An on-line training tool and background check resource for local church volunteers working with children, youth and vulnerable adults. [Learn more here.](#)

### **Tax Packet For Local Churches**

The General Council on Finance and Administration (GCFA) provides a Tax Packet on [their website.](#) The tax packet covers:

- What's New
- Tax Information for Clergy Housing Allowance
- IRS Audit Guidelines
- Tax Status of Deacons
- Business Expenses and Reimbursements. Accountable Reimbursement Policies.
- Local Transportation Expenses
- Moving Expenses
- Spousal Travel Expenses
- Pastor's Discretionary Funds
- Tax Information for Local Churches – Tax Reporting and Filing Requirements
- Form 941
- Form W-2
- Form W-3
- Tax Exempt Status of Churches
- Charitable Contributions
- Employee or Independent Contractor
- Additional Resources

### ***Additional Opportunities and Resources Available to Churches***

#### **Missions opportunities database**

Learn where you or a group can make a difference by visiting the [Missions Opportunity Finder here.](#)

#### **Stewardship Information and Webinars**

The General Board of Discipleship provides webinars on stewardship. [Click here](#) to view resources, offerings and to register.

#### **IRS**

Get forms, publications, and other information.

Individual helpline: 800-829-1040

Request EIN: 800-829-4933

<http://www.irs.gov/>

#### **Website Resources**

[www.minnesotaumc.org](http://www.minnesotaumc.org) The website for the Minnesota Annual Conference. Contains numerous resources including bulletin inserts, conference budget information, Tables I, II, & III, answers to frequently asked questions about Tables, remittance form, health benefits, safety concerns, tax information, news, classified ads, conference calendar of events, conference directory, forums to express your views, and much more.

[www.campminnesota.org](http://www.campminnesota.org) The website for United Methodist camps and retreats in Minnesota. It includes information on events for all ages, links to each of the campsites, registration information, on-line registration, equipment rentals, and much more.

[www.rcc-mn.org](http://www.rcc-mn.org) The website for the Resource Center for Churches offers an on-line catalog of resources available for loan.

[www.umc.org/resources/infoserv](http://www.umc.org/resources/infoserv) Answers almost any question about the United Methodist Church such as beliefs, policies, where to find resources, and more. Email InfoServ at [infoserv@umcom.org](mailto:infoserv@umcom.org).

[www.umc.org](http://www.umc.org) The website for The United Methodist Church. Find links to other United Methodist agencies, resources, information, news items, and commentaries. Find a United Methodist church. Find updates from General Conference, Imagine No Malaria, and other events. Find links to stores with United Methodist products. Find many other helpful resources!

[www.gcfa.org](http://www.gcfa.org) The website for the General Council on Finance and Administration contains numerous resources for local church financial management and risk management. Some of them are the Tax Packet with instructions for clergy W-2 and accountable reimbursement plans, Local Church Audit Guide, legal manual, 501c 3-group ruling, and many more.

[www.wespath.org](http://www.wespath.org) Wespath benefits and Investments formally known as the General Board of Pension and Health Benefits. Great resources for local church discipleship ministries including worship resources, evangelism, stewardship, and church growth.

[www.umcmision.org](http://www.umcmision.org) The website for the General Board of Global Ministries. Find global news, mission programs, listing of missionaries with bios, Missioners of Hope, information on covenant relationships with a missionary, mission volunteers, mission education, links to UMCOR and general advance specials, and other links of interest.

[www.umcor.org](http://www.umcor.org) The website for UMCOR. Sign up for weekly UMCOR missions updates, find UMCOR advances and descriptions, find out the current needs, and more.

[www.umcgiving.org](http://www.umcgiving.org) Describes apportioned giving at work. Learn how your apportionments go around the world to people in need.

[www.umcom.org](http://www.umcom.org) Find skill building tools and online courses on topics like local church marketing and church web ministry.

[www.upperroom.org](http://www.upperroom.org) The Upper Room and other discipleship resource materials are available here. Get information on programs such as walk to Emmaus, Chrysalis, and the Academy of Spiritual Formation. Get information on ministry areas such as small group ministries, Personal Spirituality, Spiritual Leadership, and International Ministries. Get news from around the world.

[www.umcdiscipleship.org/worship](http://www.umcdiscipleship.org/worship) Worship resources for this week's lectionary text, special Sunday resources, music, contemporary worship, and more. Share your music and resources with others and find new resources.

[www.rethinkchurch.org](http://www.rethinkchurch.org) The advertising and welcoming ministry of the United Methodist Church. Resources, advertising, welcoming, training, welcoming ideas, matching grant applications, and more.

[www.umcjustice.org](http://www.umcjustice.org) The website of the General Board of Church and Society. Resources and information on social issues.

[www.churchlawandtax.com](http://www.churchlawandtax.com) The website of Christianity Today International. The Church and Clergy Tax Guide, Church Law and Tax Report, and the monthly newsletter Church Treasurer Alert! are available here.



[www.ssa.gov](http://www.ssa.gov) The website for the Social Security Administration.