**Summary of CFO Forum of GWA**

**March 11-12, 2019**

Participants met at the Church of God headquarters in Anderson, Indiana: Don Williams of the Missionary Church; James Coulston of Evangelical Methodist; Jennifer Neal of Church of God; Jo Lammey of Free Methodist; Keith Cox of Nazarene; Ron Duncan, GWA Executive Director. Kevin Batman of the Wesleyan Church had a flooded basement and could not attend; Bruce Crabtree of Churches of Christ in Christian Union; and, Cynthia Foley of the Salvation Army could not attend.

**Agenda**

Monday-noon-Lunch provided

 1:00pm- Presentation by Jeff Jenness, Board Member of Church Alliance, on the topic of “Current litigation concerning housing allowance” and potential pension battles for the future.”

 2:00pm-Questions

 2:30pm Introductions of participants

 3:00pm break

 3:15pm “What changes,advances have you made this past year in terms of process that has been beneficial?”

Tuesday

 8:30am-Devotions-

 8:45am-Discussion about “Next Generation Audit”

 9:30am-What are your greatest challenges for the short term? long term?

 10:15 Break

 10:30am- How are your groups addressing the changing giving patterns in our culture?

 11:00am-How can your colleagues within GWA be helpful to you?

 11:30am-Future meetings

 11:45am-Departure

We began with lunch and shared around the table great fellowship. Jeff Jenness and Jim Obold shared in a presentation concerning the current state of pensions in America and specifically about pensions in the life of the church along with the Housing Allowance litigation at the 7th Circuit Court of Appeals(PTL, the court ruled on 3-15-19 the HA was constitutional). The power point presentation is attached.

Each participant then shared about his/her work over the past year and the challenges he/she have faced. Some of the common themes discussed were the difficulties of international money transfers, how to develop an enterprise risk culture, the current cost of audits and possibly moving to financial reviews for several years then having an audit, where are the benchmarks for executive salaries, finding quality employees in the accounting sector, parking lot tax issue with IRS, mobile giving, what functions within the denomination can be outsourced, what systems are you currently using and what is working, employee expense accounts and credit cards, and Disaster relief. Suggestions and comments were made on all these topics and information shared with one another.

The group decided to create a SLACK group so they could communicate with one another throughout the year and share information. Each downloaded the app and started the process. If those who were not present wish to join, download the app, and then send Jennifer a note and she will send you an invite(JNeal@chog.org)

The group affirmed they wanted to stay in touch through SLACK and meet in 2020. Don Williams invited the group to the Missionary Church headquarters located in Ft. Wayne, Indiana, March 16-17, 2020, meeting from noon to noon.

Meeting adjourned.

Respectfully submitted

Ronald V. Duncan

GWA, Executive Director