

# How To - Top to Bottom!



THE UNITED METHODIST CHURCH

CHARGE CONFERENCE

## Charge Conference 2020 Checklist

CHURCH \_\_\_\_\_ Pastor in Charge \_\_\_\_\_

Forms sometimes get separated from their files - Please write the name of your church and your pastor here!

Include your church number, especially if your church has a common name.

**The following items have been entered on line:**

To complete the reports online through Data Services, start at the Conference home page at <https://ngumc.org> and click the "log in" tab in the upper right corner. Clergy Packet forms require a clergy ngumc.net address. Clergy or those authorized to administer users must create individual user accounts and establish permission levels for staff members using the Administer User Accounts tab.

Anyone submitting info should have their OWN Data Services profile.

**UNDER CHARGE CONFERENCE TAB**

Yes	No	
_____	_____	Church Information Report
_____	_____	Finance Report
_____	_____	Lay Servant's Annual Report
_____	_____	Lay Members (Delegates to Annual Conference)
_____	_____	Pastor's Report, Part 1 (No Recommendation for Ministers)
_____	_____	Treasurer's Report (Only for Churches)

Checking "Yes" or "No" is an affirmation that this task was done properly or not done. If the task is not done, and you check 'Yes', it is not helpful to your church, the district or the conference. Don't be that guy.

**Record these Lay Leadership positions:**

- Admin/Church Council Chair
- Children's Coordinator
- Finance Chair
- Financial Secretary
- Lay Leader
- Lay Member
- Lay Member Reserve
- Missions/Outreach Chair
- Staff Parish Relations Chair
- Staff Parish Relations Members
- Treasurer
- Trustee Chair
- UMM President
- UMW President
- Youth Minister

**How to Create an Individual Data Services Account**

[Church Information Report](#)

[Finance Report](#)

[Lay Servant Annual Report](#)

**Useful Links**

- Church Information Report**
- Finance Report**
- Lay Leadership – Nominations**
- Lay Members (Delegates to Annual Conference)**

PLEASE have at least one lay member RESERVE for each lay member allotted!

**Lay Leadership Guidelines**

- Some lay positions required in previous years are not needed. Record ONLY the positions available. Don't list your whole finance committee as finance chairs.
- Lay Leadership MUST have a regularly monitored email address and phone number - no exceptions. All leaders must be able to be contacted by the district or conference directly. This is now an important part of being in a leadership role and is not negotiable.
- NEVER enter the church office, pastor, or any one else's address or phone number instead of the leader's confirmed contact info.
- Enter every position every year. Positions do not "carry over" from year to year.

Be sure the positions required by the Book of Discipline are filled properly.

[Leadership Requirements](#)

Reports for High School students are no longer necessary or available. The only current report is for college freshmen.

If you have no recommendations for ministry or college students enter "N/A" in the "YES" column.

- \_\_\_\_\_ \_\_\_\_\_ Lay Servant's Annual Report (Completed by each lay servant)
- \_\_\_\_\_ \_\_\_\_\_ Pastor's Report, Part 1 (Note: Membership statistics will be reported in Part 2 as part of the Charge Conference)
- \_\_\_\_\_ \_\_\_\_\_ Recommendation for Ministry (If any require Charge Conference action)
- \_\_\_\_\_ \_\_\_\_\_ Treasurer's Report (Only for use when an appropriate recent financial statement is not available)
- \_\_\_\_\_ \_\_\_\_\_ Trustees' Report
- \_\_\_\_\_ \_\_\_\_\_ Higher Education: For high school students, the United Methodist Higher Education Foundation has discontinued the United Methodist Leadership Scholars (UMLS) program. More information is available at <https://www.umhcf.org/umls/>. For college students, enter information at <https://docs.google.com/forms/d/e/1FAIpQLSdC-pK7eMOnhyAU3K2ebWY7qVBhlp-2ZIGohq691xNNOIZgpQ/viewform>. For support please contact Higher Ed at 770-854-7283 or [gahied@bellsouth.net](mailto:gahied@bellsouth.net).
- \_\_\_\_\_ \_\_\_\_\_ Vital Congregations Goals for 2023 and revisions to years 2020-2022 if desired at <http://www.umc.org/how-we-serve/vital-congregation-goal-setting>

**UNDER CLERGY REPORT TAB**

- \_\_\_\_\_ \_\_\_\_\_ Clergy Information Report (Master List) - Updated
- \_\_\_\_\_ \_\_\_\_\_ Clergy Financial Support Worksheet – entered & approved
- \_\_\_\_\_ \_\_\_\_\_ Housing Allowance Form

One for each clergy on staff under appointment.

ALL PARSONAGES will require a parsonage inspection report this year. Be sure to use the DISTRICT I Parsonage Report form at NGUMC.org

**Useful Links**

- [Pastor's Report](#)
- [Recommendation for Ministry](#)
- [Treasurer's Report](#)
- [Trustee's Report](#)
- NEW** • [Parsonage Inspection Report](#)

- [Clergy Information Report](#)
- [Clergy Financial Support Worksheet](#)
- [Lay Instructions for Clergy Financial Support Process](#)
- [Clergy Instructions for Clergy Financial Support Process](#)
- NEW** • [Benefits FAQ](#)

Printed out and placed in the folder

**Hard copies of the following items are to be brought to Charge Conference:**

- \_\_\_\_\_ \_\_\_\_\_ This Check List with signatures
- \_\_\_\_\_ \_\_\_\_\_ 2021 Clergy Financial Support Worksheet – entered by clergy, approved by SPRC
- \_\_\_\_\_ \_\_\_\_\_ Insurance Declarations Page
- \_\_\_\_\_ \_\_\_\_\_ Lay Servant Ministry listing along with signed annual reports
- \_\_\_\_\_ \_\_\_\_\_ Parsonage Inspections Report (if applicable)
- \_\_\_\_\_ \_\_\_\_\_ Recommendation for Ministry Report – if any, that require Charge Conference action
- \_\_\_\_\_ \_\_\_\_\_ Treasurer's Report or Financial Statement (Statement of Activities and Statement of Financial Position)

No parsonage?  
No move?  
No recommendations for ministry?  
Write "N/A" in the "Yes" column

The terms "Church Council" and "Admin Council" are interchangeable.

This is your church's affirmation that these duties required by the Book of Discipline have been carried out.

**Indicate if the following items have been addressed:**

- \_\_\_\_\_ The Church Council has voted on the Pastor's Salary for 2021
- \_\_\_\_\_ The Church Council has voted on the Nominations Report for 2021
- \_\_\_\_\_ Membership Audit has been conducted
- \_\_\_\_\_ Pastor has had Continuing Education credit this year

We affirm that the Administrative Council met and approved the above paperwork as reflected in the attached minutes of that meeting.

Date of the Church Council Meeting \_\_\_\_\_ Date of the Charge Conference \_\_\_\_\_

\_\_\_\_\_  
Signature of the Pastor

\_\_\_\_\_  
Signature of the Council Chair

\_\_\_\_\_  
Signature of the Staff Parish Chair

\_\_\_\_\_  
Signature of D.S.

Rev. Dr. Terrell will sign your folder after it has been reviewed as complete.

These signatures are required. Don't turn in a folder without the pastor, SPR chair and Admin/Church Council chair signatures.



Completed folders are due at the District Charge Conference  
October 11 - 4 pm - East Churches @ Acworth UMC  
October 25 - 4 pm - West Churches @ Carrollton UMC

YOU MUST return your completed charge conference folder at your appointed district conference.  
East - Cobb, Douglas, Paulding East (All Paulding other than exceptions below)  
West - Haralson, Carroll, West Paulding (Pleasant Grove UMC Temple & Smyrna UMC Dallas)

# Charge Conference Fall 2020

- Don't remove the checklist from the folder. If you need a copy it is online at [Charge Conference Checklist - District 1 CW](#) at NGUMC.org -> Forms -> Charge Conference Reports. Be SURE to use the District 1 CW Form!

- Please keep track of your folder. The folder is an unusual color each year so it is easily recognized.

- No staples, clips, binding, rings, binders, tape, glue, glitter, Post-It notes, folding, spindling or mutilating.

- DO NOT put anything in the charge conference folder other than the checklist items requested in the HARD COPY Section. If your church is creating a book each year, don't put one in your folder. Please consider that a pdf format document may be a better stewardship decision.

- Lay Members to Annual Conference are lay leadership positions which are voted on along with the rest of the slate of leadership brought forth by nominations. They are voted upon and entered in the Lay Leadership report EVERY YEAR. Lay Members cannot be substituted if they cannot attend EXCEPT by Lay Member Reserves. Be sure you've got reserves for each lay member and that your lay members understand that their service is year-by-year. (Not an appointment for life like the Supreme Court.)

- If your church is using the "One Board" model or transitioning to it this year, the lay leadership positions required by the Book of Discipline must still be reported.

- Think carefully about the information you give in charge conference packets on children and college students. Churches go to great lengths to be Safe Sanctuaries compliant then distribute a handy charge conference booklet with the name, gender, age, phone number and home address of all their students. Treat your charge conference handouts as if they are public information. Be transparent about your organization, not your most vulnerable members.

Actual items found in folders in the past 2 years

DVD of a sermon	Photographs	Church History
Anniversary Booklet	52 Page Printout of a Slide Show	Blueprints
Church Directory	CD of the choir	Connection Card
Wednesday Night Dinner Menu	Invitation to the Preschool Turkey Trot	Map of the Church Grounds
Homecoming Hymn Sing Booklet	UMW Cookbook	Fundraising Order Form
Thumb Drive	Building Proposal	Acolyte Application
Christmas Worship Schedule	CEU Certificate	Commemorative Bookmark



North Georgia Conference of  
the United Methodist Church

[NGUMC.org](http://NGUMC.org)

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Please read the instructions in this guide, on the forms, and check NGUMC.org before calling or emailing.