20:	20 Heritage Distric	t Charge Conference	e Forms Check List		9
Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
Pastoral Self-Evaluation	Pastor	P, SPRC, DS	**Lname.Fname.eval.self.2020	10 Days Prior to SPRC	
Deacon Self-Evaluation	Deacon	D, SPRC, DS	Lname.Fname.eval.self.2020	10 Days Prior to SPRC	
Housing Allowance	Pastor	P, CConf Sec'y, DS	Lname.Fname.Hallowance.2021	10 Days Prior to SPRC	
Furnishings Allowance	Pastor	SPRC	Lname.Fname.Fallowance.2021	10 Days Prior to SPRC	
WesPath/UMPIP	Pastor	P		Mail to address on form	
Business of the Church Conference	Pastor	NR .	churchname.bocc.2020	10 Days Prior to SPRC	
Members At Colleges/Universities	Pastor	NR	churchname.cu.2020	CConf	
Year End Report	Pastor	P	Lname.Fname.yer.2020	Dec. 31, 2020	
Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
SPRC Evaluation of Clergy	SPRC	P, SPRC, DS	Lname.Fname.eval.sprc.2020	10 Days Prior to SPRC	
SPRC Evaluation of Deacon	SPRC	D, SPRC, DS	Lname.Fname.eval.sprc.2020	10 Days Prior to SPRC	
*First Year Review	SPRC	P, SPRC, DS	Lname.Fname.eval.rev.2020	10 Days Prior to SPRC	
Joint Dialogue	SPRC	P, SPRC, DS	Lname.Fname.eval.jd.2020	10 Days Prior to SPRC	
Clergy Compensation	SPRC	P, SPRC, TR, DS	Lname.Fname.mi.income.2021	10 Days Prior to SPRC	
DSA Compensation	SPRC	P, SPRC, TR, DS	Lname.Fname.mi.dsa.income.2021	10 Days Prior to SPRC	
Accountable Reimbursement	SPRC	P, CCC, SPRC	churchname.ar.2020	CConf	
Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
Profile of the Church	CCC	P, CCC	***churchname.cp.2020	10 Days Prior to CConf	
Business of the Church Conference	P	NR	churchname.bocc.2020	10 Days Prior to CConf	
2021 Leadership Roster	P or CCC	NR	churchname.leadership.2020	7 Days after CC	
Agenda	Standard Format as	stated on this form w	ill be used.		
Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
GCFA Report of Finance Committee	FC	FC	churchname.rofc.2020	CConf	
Fund Balance Report	FC, Preparer	FC, Preparer	churchname.fbr.2020	Jan. 1 - Feb 1, 2021	
Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
GCFA Report of the Trustees	TC	TC	churchname.rot.2020	CConf	
GCFA Accessibility Audit	TC	P, TC, DS	churchname.access.2020	CConf	
GCFA Insuarance Worksheet	TC	Preparer	churchname.insurance.2020	CConf	
Parsonage Information Report	TC	P, TC, SPRC	churchname.pars.info.2020	CConf	
Parsonage Inspection Report	USE AS A GUIDE	WHEN COMPLETING	NG WALKTHROUGH OF PARSO	ONAGE. DO NOT SUB	MIT.
	Form Name Pastoral Self-Evaluation Deacon Self-Evaluation Housing Allowance Furnishings Allowance WesPath/UMPIP Business of the Church Conference Members At Colleges/Universities Year End Report  Form Name SPRC Evaluation of Clergy SPRC Evaluation of Deacon *First Year Review Joint Dialogue Clergy Compensation DSA Compensation Accountable Reimbursement  Form Name Profile of the Church Business of the Church Conference 2021 Leadership Roster Agenda  Form Name GCFA Report of Finance Committee Fund Balance Report  Form Name GCFA Report of the Trustees GCFA Accessibility Audit GCFA Insuarance Worksheet Parsonage Information Report	Form Name Pastoral Self-Evaluation Deacon Self-Evaluation Deacon Self-Evaluation Deacon Self-Evaluation Deacon Housing Allowance Pastor WesPath/UMPIP Business of the Church Conference Members At Colleges/Universities Year End Report Pastor  Form Name Completed By SPRC Evaluation of Clergy SPRC Evaluation of Deacon *First Year Review Joint Dialogue Clergy Compensation DSA Compensation Accountable Reimbursement SPRC  Form Name Completed By Profile of the Church Business of the Church Conference 2021 Leadership Roster Agenda Form Name Completed By GCFA Report of Finance Committee FC Fund Balance Report Form Name Completed By GCFA Report of the Trustees GCFA Accessibility Audit GCFA Insuarance Worksheet Pastor	Pastoral Self-Evaluation Deacon D, SPRC, DS Deacon Self-Evaluation Deacon D, SPRC, DS Housing Allowance Pastor P, CConf Sec'y, DS Furnishings Allowance Pastor P, CConf Sec'y, DS Furnishings Allowance Pastor P, CConf Sec'y, DS Furnishings Allowance Pastor SPRC WesPath/UMPIP Pastor P Business of the Church Conference Pastor NR Members At Colleges/Universities Pastor NR  Year End Report Pastor P  Form Name Completed By Signed By  Signed By  Signed By  Signed By  Signed By  Signed By  Signed By  Signed By  Sprc P, SPRC, DS  SPRC D, SPRC, DS  SPRC D, SPRC, DS  SPRC D, SPRC, DS  SPRC P, SPRC, DS  Joint Dialogue SPRC P, SPRC, DS  Clergy Compensation SPRC P, SPRC, TR, DS  DSA Compensation SPRC P, SPRC, TR, DS  Accountable Reimbursement SPRC P, CCC, SPRC  Form Name Completed By Signed By  Profile of the Church Conference P  Business of the Church Conference P  CCC P, CCC  Business of the Church Conference P  CCC P, CCC  Business of the Church Conference P  CCC F, CC  Business of the Church Conference P  CCC F, CC  Business of the Church Conference P  CCC F, CC  CCC F, CC  Business of the Church Conference P  CCC F, CC  CCC F	Pastoral Self-Evaluation Pastor P, SPRC, DS **Lname.Fname.eval.self.2020 Deacon Self-Evaluation Deacon D, SPRC, DS Lname.Fname.eval.self.2020 Housing Allowance Pastor P, CConf See'y, DS Lname.Fname.eval.self.2020 Furnishings Allowance Pastor SPRC Lname.Fname.Hallowance.2021 WesPath/UMPIP Pastor P Business of the Church Conference Pastor NR churchname.cu.2020 WesPath/UMPIP Pastor P Business of the Church Conference Pastor NR churchname.eu.2020 WesPath/UMPIP Pastor P Business of the Church Conference Pastor NR churchname.eu.2020 WesPath/UMPIP Pastor P Business of the Church Conference P Business of the Church Conference P Business of the Church Conference P Restor NR churchname.eu.2020 WesPath/UMPIP Pastor P Business of the Church Conference P Restor NR churchname.eu.2020 WesPath/UMPIP Pastor P Business of the Church Conference P Restor NR churchname.eval.goo. WesPath/UMPIP P Business of the Church Conference P Restor NR churchname.eval.goo. WesPath/UMPIP P Restor P, SPRC, DS Lname.Fname.eval.goo. WesPath/UMPIP P Business of the Church Conference P NR churchname.eval.goo. WesPath/UMPIP P Restor P, SPRC, DS Lname.Fname.eval.goo. WesPath/UmPiP P Restor P, SPRC, TR, DS Lname.Fname.eval.goo. Wes	Form Name

Membership	Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
	Membership Report	Membership Sec'y	P, Membership Sec'y	churchname.member.2020	CConf	
Nom./Leadership	Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
	No form. Nominations/Leadership					
	Representative NA Ministries	P	NR .	churchname.NAministries.2020	CConf	
						in the state of th
Miscellaneous	Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
	Engage MI 2021	Due per instruction	ns on form.		Vi Vi	
Heritage District	2021 Leadership Roster	P or CCC	NR	churchname.leadership.2020	7 Days after CC	
	Charge Conference Minutes	CConf Sec'y	CConf Sec'y	churchname.minutes.2020	7 Days after CC	
Lay Servant	Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box
Follow	Ceretified Lay Servant	Lay Servant	Applicant, P, CCC	LSv.Lname.Fname.ar.2020	CConf	
instructions on	Certified Lay Speaker	Lay Speaker	Applicant, P, CCC	LSp.Lname.Fname.ar.2020	CConf	
bottom of form	Certified Lay Minister	Lay Minister	Applicant, P, CCC	CLM.Lname.Fname.ar.2020	CConf	

Key

Task Completed (add x or check mark)

Due in Drop Box 10 Days Prior to SPRC Meeting

Due in Drop Box 10 Days Prior to Charge Conference

Due in Drop Box at Church Conference

Examples of specifically named file path

\*\*Example Clergy File Name: mcgee.darlene.eval.self.2020

\*\*\*Example Church File Name: ann.arbor.first.cp.2020

CCC - Church Council Chair/Governance Bd Chair

CConf - Charge Conference

D - Deacon

DS - District Superintendent

FC - Finance Chair

NR - Not Required

P - Pastor

Sec'y - Secretary of Charge Conference

SPRC - SPRC Chair

TC - Trustees Chair

TR - Church Treasurer

All files acceptable in Drop Box as Excel, PDF and Word