

**2020 Heritage District Charge Conference Forms Check List**

8/12/2020

<b>Clergy</b>	<b>Form Name</b>	<b>Completed By</b>	<b>Signed By</b>	<b>File Name and Information</b>	<b>Due in Drop Box</b>	<b>In Drop Box</b>	
	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		
no official form	Year End Report	Pastor	P	Lname.Fname.yer.2020	Dec. 31, 2020		
<b>SPRC</b>	<b>Form Name</b>	<b>Completed By</b>	<b>Signed By</b>	<b>File Name and Information</b>	<b>Due in Drop Box</b>	<b>In Drop Box</b>	
*New appointment will complete First Year Review not Evaluation	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		
<b>Church Council</b>	<b>Form Name</b>	<b>Completed By</b>	<b>Signed By</b>	<b>File Name and Information</b>	<b>Due in Drop Box</b>	<b>In Drop Box</b>	
	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		
Heritage District	2021 Leadership Roster	P or CCC	NR	churchname.leadership.2020	7 Days after CC		
	Agenda	Standard Format as stated on this form will be used.					
<b>Finance Chair</b>	<b>Form Name</b>	<b>Completed By</b>	<b>Signed By</b>	<b>File Name and Information</b>	<b>Due in Drop Box</b>	<b>In Drop Box</b>	
	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		
<b>Trustees</b>	<b>Form Name</b>	<b>Completed By</b>	<b>Signed By</b>	<b>File Name and Information</b>	<b>Due in Drop Box</b>	<b>In Drop Box</b>	
	GCFA Report of the Trustees	TC	TC	churchname.rot.2020	CConf		
	GCFA Accessibility Audit	TC	P, TC, DS	churchname.access.2020	CConf		
	GCFA Insurance Worksheet	TC	Preparer	churchname.insurance.2020	CConf		
(every 5 years)	Parsonage Information Report	TC	P, TC, SPRC	churchname.pars.info.2020	CConf		
	Parsonage Inspection Report	USE AS A GUIDE WHEN COMPLETING WALKTHROUGH OF PARSONAGE. DO NOT SUBMIT.					

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 slate prepared for vote at Charge Conference.						
	Representative NA Ministries	P	NR	churchname.NAministries.2020	CConf		
Miscellaneous	Form Name	Completed By	Signed By	File Name and Information	Due in Drop Box	In Drop Box	
	Engage MI 2021	Due per instructions on form.					
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 instructions on bottom of form	Cerertified Lay Servant	Lay Servant	Applicant, P, CCC	LSv.Lname.Fname.ar.2020	CConf		
	Certified Lay Speaker	Lay Speaker	Applicant, P, CCC	LSp.Lname.Fname.ar.2020	CConf		
	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**