

# 2018 Charge Conference Instruction Form



## District Wide Charge Conference

One District-Wide Charge Conference will be held this year. The date, time and location will be provided once details are finalized. All completed forms (with attachments) are due to the district office **ONE MONTH** prior to the District-Wide Charge Conference date.

This year, all reports must be approved by the congregation's governing board (Church Council or Administrative Board) in the form of a recommendation to the Charge Conference so that your congregation's submitted materials will be properly before the District-wide charge Conference. Be sure to submit the *2018 Board Recommendations and Charge Conference Approval Receipt* along with your Charge Conference documents to indicate board approval of the entire packet and to recommend it to the Charge Conference.

## Charge Conference Packet

- Charge Conference packets/forms may be found online at [www.arumc.org](http://www.arumc.org) under the "forms" tab. ***These forms MUST be downloaded first.*** Upon downloading and saving the PDF version of the forms to your computer, you must use Adobe Acrobat or Adobe Reader to open the file in order to enter your data. The Windows 10 version of a pdf reader will not allow you to fill in the forms. Adobe Reader is free and can be downloaded from [www.adobe.com](http://www.adobe.com). If downloading Adobe Reader is not possible, the Word version of the forms should be downloaded.
- Each district office will also be sending forms via mail and/or email.
- The *Pastor's Membership Report* and the *Pastor's Compensation Form* (available in both Word and PDF versions) are set up to calculate totals. ***Navigation Tip:*** Use the "TAB" key to navigate through the forms. If you hit "Enter/Return" by accident, just backspace or "UNDO." The calculations are executed by tabbing to the next field.
- Materials should not be presented in a binder, as this must be taken apart and placed in the permanent file. Please do not staple any forms together as all staples have to be removed for scanning.
- Mail, email, or deliver **ONE (1) copy** of the Charge Conference packet for each church to your District Superintendent. Remember to print a copy for the church files.
- *The Safe Sanctuary Policy, Financial Policy, Accountable Reimbursement Policy, and Accessibility Audit/Plan are to be reviewed, signed and dated annually by the chairperson and pastor. A copy of each should be placed on file in the church office and submitted to the district office annually as part of the charge conference records.*

## 2018 Board Recommendations and Charge Conference Approval Receipt

On this date \_\_\_\_\_, 2018 at (place) \_\_\_\_\_

The following churches/charge held a meeting of the Church Council/Administrative Board/governing board to recommend actions at a meeting of the Charge Conference

The meeting was chaired by \_\_\_\_\_

*Recording Secretary should initial each item listed below to indicate that the congregation's governing board has reviewed and recommended the congregation's Charge Conference Packet (including required reports and policies) and now submit the entire packet for Charge Conference approval.*

	Congregational Board recommendation to Charge Conference <small>(Recording Secretary Initials)</small>
Membership Report Including Members Names read for Removal	_____
2019 Pastor's Compensation Package(s)	_____
Lay Servants/Speakers <small>(write N/A if None Submitted)</small>	_____
Candidate Recommendations <small>(write N/A if None Submitted)</small>	_____
Committee on Nominations Approval of officers	_____
Written Reports and Policies	_____

**District Office Use**

	Received by District Office	Approved at Charge Conference
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Board Recommendation to Charge Conference

The Church Council / Administrative Board / governing board of the pastoral charge approves of submitted recommendations and reports, and it forwards these submissions to the District-wide Charge Conference for adoption.

Signed, \_\_\_\_\_ Recording Secretary

### District Office Use

#### Submission Received and Filed for Action

The District Office is in receipt of these submissions and the packet is filed for Charge Conference Approval.

Signed, \_\_\_\_\_ District Superintendent

#### Charge Conference

The Charge Conference Approved the submitted packet on \_\_\_\_\_ (date) at \_\_\_\_\_.

Signed, \_\_\_\_\_ District Superintendent

*Please save the completed receipt with the congregation's copy of the Charge Conference File.*

## 2018 CHARGE CONFERENCE MINUTES

On this date \_\_\_\_\_, 2018 at (place) \_\_\_\_\_

The following churches/charge held annual Charge Conference:

\_\_\_\_\_

\_\_\_\_\_

The meeting was chaired by \_\_\_\_\_

### **Items that require a vote to approve:**

#### **Within Membership Report**

- Initial reading of names of members recommended for later removal by charge conference action
- Second Year (final) reading of names of members recommended for removal by charge conference action

#### **Pastor's Compensation Record**

- 2019 Pastor's Compensation Package

#### **Lay Servants (attach list if necessary)**

##### **Certified (Advanced) Lay Servant**

Name(s): \_\_\_\_\_

- Initial Year Approval       Renewal

##### **Certified Lay Speaker**

Name(s): \_\_\_\_\_

- Initial Year Approval       Renewal

#### **Candidates for Ministry**

- Initial Year Approval (Form 104)

List name(s): \_\_\_\_\_

- Approval for continuance as certified candidate (Form 104)

List name(s): \_\_\_\_\_

#### **Committee on Nominations**

- Any revision to nominations (include nominations from the floor of the conference)

List name(s): \_\_\_\_\_

- Approval of the slate of officers (slate must be in charge conference packet)

### **Required Written Reports**

*(signed and filed but not normally presented or voted on)*

- Pastor's Written Report
- 200,000 Reasons Report
- Trustee Report
- Policy on Misconduct of Sexual Nature
- Finance Report
- Local Church Leadership List

### **Other Policies to Submit**

*(to be reviewed annually, signed by chairperson and pastor, and filed in church office and submitted to District Office)*

- Safe Sanctuary Policy
- Financial Policy
- Accountable Reimbursement (if applicable)
- Accessibility Audit and Plan (if applicable)

**Optional Reports** *(may be handed in and reviewed but not presented orally at Charge Conference)*

- United Methodist Women
- United Methodist Men
- United Methodist Youth

**Additional Notes: If needed please attach your notes.**

**Signed,**

\_\_\_\_\_  
**Recording Secretary**

**Pastor's Membership Report  
2018 Charge Conference**

*This report is done on a yearly basis and is from **Charge Conference to Charge Conference***

**Church** \_\_\_\_\_ **Date** \_\_\_\_\_

**I. Total Full Members at 2017 Charge Conference**

- A. List those who have been received into Full baptized membership since the last report. **(Attach as a list.) Do not include these in the total.** \_\_\_\_\_
- B. List those who have been received into Full professing membership since the last report. **(Attach as a list.)**
  - 1. On profession of faith or restored. \_\_\_\_\_
  - 2. From other United Methodist churches. \_\_\_\_\_
  - 3. From other non-United Methodist churches. \_\_\_\_\_

**Total Full Members Received:** \_\_\_\_\_

- C. List those who have been removed from the professing membership since the last report. **(Attach as a list.)**
  - 4. By action of the Charge Conference. \_\_\_\_\_
  - 5. By trial court, or by withdrawal. \_\_\_\_\_
  - 6. By transfer to other United Methodist churches. \_\_\_\_\_
  - 7. By transfer to other non-United Methodist churches. \_\_\_\_\_
  - 8. By death. **(Please include date of death.)** \_\_\_\_\_

**Total Full Members Removed:** \_\_\_\_\_

**II. Total Full Members at 2018 Charge Conference:** \_\_\_\_\_  
*This number should reflect changes made in IV below*

**III. Names of Persons Filed with Charge Conference for Next Year's Removal:**  
(1<sup>st</sup> year reading)

**IV. Names of Persons Being Recommended for Removal at this Charge Conference:**  
(2<sup>nd</sup> year reading)  
*Note that the Discipline requires these to be considered individually!*

**V. Have Membership Books Been Audited?**  Yes  No  
If not, why not?

# 2019 Pastor's Compensation Form



**Pastor:** \_\_\_\_\_

**Church:** \_\_\_\_\_

**For Period of: January 1, 2019 through December 31, 2019**

**2018**

**2019**

<b>Housing</b>	<b>Parsonage Provided – Write Yes or No</b>			
	<b>Date of (S)PPRC chairperson parsonage inspection</b>			
	<b>Housing Allowance - May only be used in lieu of parsonage</b>			
<b>Payment</b>	<b>Church Contribution to Pastor Compensation (Salary from Church)</b>	1		
	<b>Equitable Compensation or Mission Local Church Support - Compensation support received from the Annual Conference</b>	2		
	<b>Cash Allowances</b> paid directly to pastor without documentation required (non-accountable plans not already included in line 1)	3		
	<b>Utilities and Appurtenances</b> – Amount paid to pastor for utilities and other housing related expenses under designation by the church. See IRS Publication 517 for more information.	4		
	<b>TOTAL OR GROSS CASH PAYMENT - Add Lines 1-4</b>	<b>5</b>		
<b>Deductions</b>	<b>Flexible Spending Plan</b> - This is a FSP that the pastor sets following IRS Cafeteria Plan Section 125 Rules. This may NOT be used for health insurance premiums. It is a before tax payroll deduction which is elected annually and is a Use it or Lose it amount.	6		
	<b>UMPIP Contribution</b> - This is a voluntary amount elected by the pastor to be paid into UMPIP. FOR CHURCH MATCH, PASTOR MUST CONTRIBUTE AT LEAST 1% OF COMPENSATION.	7		
	<b>UMPIP Contribution</b> - Is this tax-deferred? Write Yes or No	7b		
	<b>403B Contribution to Other than UMPIP</b> - This is a contribution to an IRA held with a bank or investment firm. <b>There must a voluntary compensation reduction agreement on file with the church and you may elect it to be tax-deferred.</b>	8		
	<b>Total Payroll Deductions - Add lines 6-8</b>	9		
<b>Net</b>	<b>Net Compensation - Subtract Line 9 from Line 5</b>	10		
<b>Total</b>	<b>TOTAL CASH COMPENSATION - Transfer from Line 5</b>	<b>11</b>		
<b>Reimburse</b>	<b>Accountable Reimbursement</b> - This is only paid out via voucher, with receipts required, and represents maximum available. <b>Written Reimbursement Policy Must Be Agreed Upon and On File at Church</b>	12		
<b>Appointment</b>	<b>TOTAL COMPENSATION AND REIMBURSEMENTS - Add Lines 11 and 12</b>	<b>13</b>		
<b>Benefits</b>	Does the church provide group insurance for the staff in which the pastor participates? <b>Write Yes or No</b>	14		
	<b>How much vacation time will be given your pastor this year?</b> (p. 409 2015 Arkansas Conference Journal)	15		

**For all full-time pastors, the church will be responsible for a pension benefit of 14% of total comp plus housing and will be direct billed by Wespath. This is a benefit and not included in the total compensation paid to the pastor.**

The Pastor Parish Relations Committee recommends compensation after consultation with the pastor and the District Superintendent. The recommendation is reported to the Finance Committee and the Administrative Board/Council for discussion and agreement. The Charge Conference sets compensation. The church is obligated to compensate the pastor as this level until the end of the conference year. (§1624.1)

\_\_\_\_\_  
**Pastor**

\_\_\_\_\_  
**Treasurer**

\_\_\_\_\_  
**S/PPRC Chairperson**

\_\_\_\_\_  
**District Superintendent**

## Pastor's 2019 Compensation Form Instructions

### Housing

- **Parsonage Provided** – If your church provides a parsonage answer “Yes” otherwise answer “No”
- **Date of Parsonage Inspection** – Write the date of the last inspection of the church owned parsonage. If the church does not provide a parsonage then leave this line blank.
- **Housing Allowance** – List the amount of money the church provides for the pastor's housing allowance. This is only in lieu of a church owned or leased parsonage. The pastor does not have to provide the church receipts for reimbursements and these funds. This amount may be reported on box 14 of the pastor's W2.

### Payment

- **Church Contribution to Pastor Compensation** – List the total pastor's salary as approved by the charge/church conference prior to any deductions. Do not include other compensation items listed below (Equitable Compensation, Cash Allowances, or Utilities and Appurtenances).
- **Equitable Compensation or Mission Local Church Support** – List all funds received from the Conference for the support of the salary for the pastor.
- **Cash Allowances** – List any amount paid to the pastor for non-accountable cash allowances. This may include, but not limited to car or travel allowance, discretionary funds, and/or expense accounts.
- **Utilities and Appurtenances** – List funds designated for use by the pastor for housing related expenses as provided for by IRS section 107. This may include utilities, furnishings, or other non-consumable housing related expenses. More information on this topic can be found in IRS Publication 517 or by visiting [www.umc.org/gcfa/tax-packet](http://www.umc.org/gcfa/tax-packet).

### Deductions

- **Flexible Spending Plan** – These plans sometimes referred to as Cafeteria 125 plans may only be used in conjunction with a bona fide group health care plan. If the church does not offer the pastor health care coverage through a group plan, then flexible spending plans may not be used for health care reimbursements. In other words, these plans cannot be used to reimburse medical expenses, including premiums for plans bought through the medical exchange.
- **UMPIP Contribution** – This is the voluntary contribution by the pastor to the United Methodist Personal Investment Plan (UMPIP). These funds may be withheld on either a tax-deferred or tax-paid basis. At least 1% of plan compensation (Line 5 plus housing) must be contributed in order to receive a 1% matching contribution.
- **UMPIP Contribution Tax Deferred** – If the contribution from the prior line is contributed on a tax-deferred basis then write “Yes” on line 7b. If the contribution is being made after-tax write “no.”
- **403B Contribution Other Than UMPIP** – List any amount being contributed to a retirement fund for the pastor other than UMPIP. Please indicate whether or not this is being made on a tax-deferred basis.

### Reimbursements and Benefits

- **Accountable Reimbursement** – Fund established to reimburse the pastor for expenses. This should only be established with a written policy set by the church and requires written documentation of expenses. For more information and sample policies visit [www.umc.org/gcfa/tax-packet](http://www.umc.org/gcfa/tax-packet).
- **Does the Church Provide Group Insurance for You** – Please write yes or no if the church provides group insurance for the staff for the 2019 calendar year in which YOU participate.



# Report of the Lay Servant to the Charge Conference

## Initial Application or Request for Renewal

Report for the year ending: \_\_\_\_\_

**PLEASE PRINT OR TYPE**

### STATUS OF THE LAY SERVANT

Name (Mrs. Ms. Mr.) \_\_\_\_\_

Home Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone: Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Email: \_\_\_\_\_

Name of District: \_\_\_\_\_

Name of Church: \_\_\_\_\_

Church Street Address: \_\_\_\_\_

City: \_\_\_\_\_ County: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Church/Pastor Telephone: \_\_\_\_\_  Adult  Youth (13-16)

Begin Renew as a:  Certified Lay Servant  Lay Speaker

What year did you complete your Basic Course, if within the last 3 years? \_\_\_\_\_ Where? \_\_\_\_\_

What year did you complete your last Advanced Course, if within the last 3 years \_\_\_\_\_ Where? \_\_\_\_\_

Title of your last Advanced Course? \_\_\_\_\_

Which following Lay Servant Leading/Caring/Communicating Courses have you completed in the last 3 years?

Worship  Prayer  Discover your Spiritual Gifts  Preaching  United Methodist Heritage

United Methodist Polity District/ Online Event(s) taken in: \_\_\_\_\_

### **THIS SECTION IS FOR THE ROLE OF LAY SPEAKER ONLY (must be Certified Lay Servant first)**

Has Application been submitted to District LSM Director?  Yes  No

Waiting on approval  Approved:  Yes  No

*Upon application approval, satisfactory completion of the required information and course work, and every 3 years thereafter, the Lay Speaker (candidate) will be reviewed by the District Committee on Lay Servant Ministries and be recommended to the Conference Committee on Lay Servant Ministries for continuation.*

### **THIS SECTION MUST HAVE ALL INFORMATION/SIGNATURES COMPLETE**

**REQUEST OF THE LAY SERVANT:** Recommendation of my Pastor and my Charge Conference:

Begin  renew as a:  Certified Lay Servant  Lay Speaker / for year: \_\_\_\_\_

Lay Servant signature \_\_\_\_\_ Date \_\_\_\_\_

**RECOMMENDATION OF THE PASTOR:** I approve the request to  begin  renew as a:

Certified Lay Servant  Lay Speaker For the year: \_\_\_\_\_

Pastor signature \_\_\_\_\_ Date \_\_\_\_\_

**RECOMMENDATION OF THE CHARGE CONFERENCE:** Church/Charge District \_\_\_\_\_

recommends the above person to  begin  renew as a:

Certified Lay Servant  Lay Speaker For the year: \_\_\_\_\_

District Superintendent/Circuit Elder signature \_\_\_\_\_ Date \_\_\_\_\_

**MINISTRIES BY THE LAY SERVANT**

During the past year I have participated in the following ministries:

**CARING MINISTRIES.**  Served as volunteer in a care-giving institution  Provided one-on-one caring  At a hospital, nursing home, or to a shut-in  In membership/evangelism visitation  Served in caring/outreach projects (food pantry, prison ministry, etc.)  Other Caring activities (please list):

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**LEADING MINISTRIES.**

Served as a member of a committee, board, commission, council, taskforce, commission, etc.  Volunteer at a community agency  At my local church  Beyond my local church  In my District  Conference  Jurisdiction  General Church level  Other Leading activities (please list):

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**COMMUNICATING MINISTRIES.**  Brought message in \_\_\_\_\_ worship services  Served as worship leader in \_\_\_\_\_ worship services,  Delivered \_\_\_\_\_ devotional messages,  Taught \_\_\_\_\_ Sunday School classes,  Taught Lay Servant Ministry classes,  Shared my faith story,  Other Communicating activities (please list):

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**PERSONAL AND SPIRITUAL GROWTH BY THE LAY SERVANT**

In what activities have you engaged and/or what books have you read or used during the past year to help you develop your devotional life, improve your understanding of the Bible, improve your understanding of The United Methodist Church, and to improve your skills in caring, leading, communicating, and speaking?

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**FEEDBACK BY THE LAY SERVANT**

Do you feel called to be in service in any area of ministry, either in the church or outside the church, in which you are not currently involved?  Yes  No If so, please list those areas below:

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What additional training or support do you need or would suggest to further your ministry as a Lay Servant?

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Are you currently satisfied with your service opportunities as a Lay Servant?  Yes  No

Give any recommendations you have for improving the Lay Servant Ministries in your District or Conference:

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**RECOMMENDATION OF THE LAY SERVANT MINISTRIES DISTRICT COMMITTEE**

The \_\_\_\_\_ District Lay Servant Ministries Committee recommends \_\_\_\_\_

Begin/Renew as a:  Certified Lay Servant  Lay Speaker for the year \_\_\_\_\_

District Director Signature \_\_\_\_\_ Date \_\_\_\_\_

**NOTICE: After this form is completed and signed by those listed above, the Recording Secretary of the Charge Conference or Pastor is requested to reproduce TWO copies: 1) Lay Servant, 2) Local Church Records. The District Superintendent receives the original and will send a copy to the District LSM Director. These forms are needed by the Lay Servant for their permanent records.**



**THE UNITED METHODIST CHURCH  
DECLARATION OF CANDIDACY FOR ORDAINED MINISTRY  
CHARGE CONFERENCE RECOMMENDATION  
(or equivalent body)**

*This form is to be completed on all new or continuing candidates for ministry.*

**For Continuing Candidates:** I hereby request **continuation** of my candidacy for ordained ministry in The United Methodist Church and request support and recommendation of the Charge Conference for continued certification as a candidate for:

Order of Deacons       Order of Elders       License as Local Pastor

Signed: \_\_\_\_\_ Date \_\_\_\_\_

**For New Candidates:**

I hereby declare my candidacy for ordained ministry in The United Methodist Church and request the support and recommendation of the Charge Conference or equivalent body as specified by the district committee on ordained ministry for certification as a candidate for:

Order of Deacons       Order of Elders       License as Local Pastor

Signed: \_\_\_\_\_ Date \_\_\_\_\_

Signature of the Declared Candidate

**I. CHARGE CONFERENCE RECOMMENDATION (or equivalent body)**

Let those who consider recommending persons for candidacy as ordained ministers in The United Methodist Church ask themselves the following questions which were first asked by John Wesley at the third conference of Methodist preachers in 1746. (See Discipline ¶310)

1. Do they know God as a pardoning God? Have they the love of God abiding in them? Do they desire nothing but God? Are they holy in all manner of conversation?
2. Have they gifts, as well as grace, for the work? Have they a clear, sound understanding; a right judgment in the things of God; a just conception of salvation by faith? Do they speak justly, readily, clearly?
3. Have they fruit? (Elder and Local Pastor) Have any been truly convinced of sin and converted to God, and are believers edified by their preaching? (Deacon) Are others edified by their service?

Believing that \_\_\_\_\_ is called of God and is a suitable candidate for ordained ministry in the United Methodist Church, (the recommending body) \_\_\_\_\_ recommends him/her for certification as a candidate to the District Committee on Ordained Ministry. In making this recommendation, we attest to the fact that the declared candidate has been a professing member in good standing of The United Methodist Church or a baptized participant of a recognized United Methodist campus ministry or other United Methodist ministry setting for a minimum of one (1) year, has graduated from an accredited high school or received a certificate of equivalency, and has received by written ballot a two-thirds vote of this body.

Signed \_\_\_\_\_ Date \_\_\_\_\_  
Signature of authorized elder, district superintendent, or bishop

Conference \_\_\_\_\_ District \_\_\_\_\_

This Declaration of Candidacy for Ordained Ministry should be sent to the district office for the candidate's file.

## Committee Nominations

**Name of Church:**

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You **may** use this page to list your Nominations or submit your own Nomination List  
(If your church is using the Leadership Team Model, please submit your Leadership Structure List)

*The Local Church elects church officers (leadership team) which are then voted on at Charge Conference as required by the Book of Discipline. Include all your committees with all committee members. Each church should submit a Committee Nominations Report with your Charge Conference Report. Reminder: A CHARGE can have as many Lay Members to Annual Conference as it has clergy appointed to the **charge** (including Deacons).*

*NOTE: This does not replace your Local Church Leadership Form. We must have your Local Church Leadership with contact information included.*

<b>Administrative (Church) Council</b>	<b>Finance</b>	<b>Trustees</b>
Chair:	Chair:	Chair:

<b>Staff-Parish Relations</b>	<b>Nominations Committee</b>	<b>Lay Member &amp; Alt Lay Member to Annual Conference</b>
Chair:	Chair:	Lay:
		Alt:
		<b>Treasurer</b>

<b>Other:</b>	<b>Other:</b>	<b>Other:</b>
Chair:	Chair:	Chair:

# PASTOR'S WRITTEN REPORT

Name: \_\_\_\_\_

## **200,000 REASONS REPORT**

Please describe how your congregation is participating in 200,000 Reasons by helping hungry children and their families. What plans do you have to expand your current ministry or to start new ones?

# Report of the Trustees

## Churches with 51 or more in average attendance

*The trustees are amenable to the Charge Conference and as such are required to make an annual report.*

Church: \_\_\_\_\_ Charge: \_\_\_\_\_

District: \_\_\_\_\_ Conference: \_\_\_\_\_

Period beginning (prior Charge Conf.) \_\_\_\_\_ and ending (current Charge Conf.) \_\_\_\_\_

1. Is the local church incorporated (§2529.1)?  Yes  No
2. Name or names in which title to each piece of property is recorded, as shown by civil land records (§2538, 2536):

	Name(s)	Office	Book	Page
<b>Church Buildings</b>				
<b>Church Buildings</b>				
<b>Parsonages</b>				
<b>Other</b>				
<b>Other</b>				

3. Who is the custodian of deeds/other legal papers? \_\_\_\_\_  
Where are they kept? \_\_\_\_\_

*(It is recommended these documents be kept in a safety deposit or lock box, or contact the district office for guidance.)*

4. Does each deed contain Trust Clause (§2503)?  Yes  No
5. Do you have a long-term plan for the maintenance and replacement of facilities and equipment?  Yes  No
6. Insurance (§2533.2, 2550.7). Please list the results of the annual review as required by The 2016 Book of Discipline.

Item Insured/ Insurance	Replacement Value	Amount of Coverage	Type of Coverage	Company	Policy Number	Restricted by Coinsurance (yes or no and amount)	Expires When
<b>Church Buildings</b>	\$	\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Parsonage(s)</b>	\$	\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Church Furnishings &amp; Equipment</b>	\$	\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Parsonage Furnishings &amp; Equipment</b>	\$	\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Vehicle(s)</b>	\$	\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>General Liability</b>		\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Worker's Compensation</b>						<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Directors/Officers/Err ors &amp; Omissions/Crime</b>		\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	
<b>Professional Liability Coverage (Including Sexual Misconduct)</b>		\$				<input type="checkbox"/> Y Amount: <input type="checkbox"/> N	

7. Have the buildings been inspected for fire and other safety hazards within the past year?  Yes  No

8. Each church is required to have a Safe Sanctuary Policy. It must be reviewed and signed by the Pastor and Chair of Trustees on a yearly basis and kept on file in the church office. A copy must be submitted to the district office yearly.

9. Has an annual accessibility audit for church properties been conducted and placed on file in the church office (§2533.6)?  
 Yes  No (Accessibility Audit Form may be found at: <http://www.gcfa.org/forms>)

10. Provide a detailed list of income-producing and permanent funds. Please attach a written statement describing how this income is used for ministry.

Item	Date Received	Amount	Where Invested	Income

15. How is this income used for ministry? **(Please attach a written explanation)**

\_\_\_\_\_ Trustee Chair (printed) \_\_\_\_\_ Signature \_\_\_\_\_ Date

## POLICY STATEMENT ON MISCONDUCT OF A SEXUAL NATURE

*This form is to be filled out for each church, properly signed and dated. This is to be done annually. Clearly indicate the name of the church in the proper places. This policy **shall** be read by the Board/Council, Pastor(s), and staff, adopted by the local Church and signed by the pastor, all staff and volunteers in children, youth, and vulnerable adult areas.*

### I. Statement of Policy

The \_\_\_\_\_ United Methodist Church affirms the 2000 Book of Resolutions, Sexual Abuse within the Ministerial Relationship and Sexual Harassment within the Church, which states that sexual abuse within the ministerial relationship and sexual harassment within the church as incompatible with biblical teachings of hospitality, justice and healing. In accordance with the 2012 Book of Discipline (§161.F), “We affirm that all persons are individuals of sacred worth, created in the image of God.” As the promise of Galatians 3-28 states: “...you are all one in Christ Jesus.” We support equality among all persons without regard to ethnicity, situation, or gender.

Misconduct of a sexual nature within the life of the church interferes with its moral mission. For the purpose of this statement, sexual misconduct includes sexual abuse and sexual harassment. Sexual abuse within the ministerial relationship occurs when a person within a ministerial role of leadership (pastor, educator, counselor, youth leader or other position of leadership) engages in sexual contact or sexualized behavior with a congregant, client, employee, student, staff member, co-worker, volunteer, person being counseled or any other person to whom the minister relates in his/her capacity as a minister. **Sexual harassment means any unwanted sexual advance or demand, written, electronic, verbal or physical that is reasonably perceived by the recipient as demeaning, intimidating, or coercive.** Sexual misconduct involves a betrayal of sacred trust, a violation of the ministerial role or exploitation of those who may be vulnerable for any reason.

\_\_\_\_\_ United Methodist Church stands in opposition to the sin of misconduct of a sexual nature in the Church and society at large and commits itself to fair and expedient investigation of any charge of sexual misconduct within the church and to take action deemed appropriate and in compliance with the Book of Discipline. Further, this church will make reasonable efforts to create an environment of hospitality for all persons, male or female, which is free of misconduct of a sexual nature and encourages respect, equality and kinship in Christ.

### II. Procedures

A. If you experience what you consider to be sexual misconduct, you may choose to keep a written record of your experiences including dates, times, places, and witnesses and should keep any written material you may have received from the person you believed to have acted inappropriately. You may, if you wish, confront the person with the inappropriate behavior and demand that it cease. If you choose not to confront the person alone, you may ask someone to accompany you to confront the person and seek a correction of the behavior and reconciliation. **If you choose not to confront the person or if the behavior continues, you are encouraged to report the incident to the chair of the person’s appropriate evaluating committee or the staff/parish relations committee, (e.g., a member, pastor or church staff member would be reported to the chair of the staff/parish relations committee; a district superintendent to the chair of the committee on superintendency; a bishop to the chair of the committee on episcopacy).** If the conflict is not resolved to your satisfaction, the committee chair shall convene the entire committee to meet with the accused, the person bringing the accusations, and each supporting person. If the situation is not resolved to your satisfaction following these efforts, then you may follow the Discipline’s procedures for grievances, complaints, and charges.

B. If you are confronted by someone who believes that he or she has experienced or observed inappropriate behavior on your part, listen to the accusation and change the behavior as may be needed or otherwise resolve the situation and reconcile the relationship where possible. **If you are unable to resolve the situation with your accuser, contact the chair of your appropriate evaluating committee or the staff/parish relations committee.** Ask to meet with your accuser and committee chair to attempt to resolve the conflict. The accused and the person bringing the accusation both have the right to bring a supportive person to this meeting. If the conflict remains unresolved, the committee chair shall convene the entire committee to meet with the accused, the person bringing the accusations, and each supporting person. If the situation is not resolved to your satisfaction following these efforts, the Discipline’s procedures for grievances, complaints, and charges may be followed.

C. If you receive a report from someone else regarding a third person’s alleged inappropriate behavior, listen seriously and objectively. Help the person follow the steps outlined above. If you are a clergy/church professional in a paid supervisory position in the local church or a conference agency, and an employee or member is reportedly being harassed, you should immediately take corrective and/or preventative action.

D. Remember that all mandated reporters must immediately report any reasonably suspected child maltreatment to the Arkansas Child Maltreatment hotline in accordance with state law. Where child maltreatment is reasonably suspected, please consult the church’s Safe Sanctuary policy for additional information.

POLICY STATEMENT ON MISCONDUCT OF A SEXUAL NATURE

Date adopted by the Church Council/Administrative Board \_\_\_\_/\_\_\_\_/2018

Signatures of Administrative Board/Church Council Chairperson and all paid staff.

Signature	Signature	Signature



## 2018 Report of the Finance Committee

Churches with 51 or more in average attendance

*Church Financial Integrity Policy is to be reviewed, signed by the pastor and finance chair, and kept on file in the church office. If changes are made to the policy, a copy will need to be sent to the district office.*

Church: \_\_\_\_\_ Charge: \_\_\_\_\_  
 District: \_\_\_\_\_ Conference: \_\_\_\_\_  
 Period beginning (prior Charge Conf.) \_\_\_\_\_ and ending (current Charge Conf.) \_\_\_\_\_  
 Employer Identification Number (EIN) \_\_\_\_\_

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### I. Organization

- a) Has the committee been organized according to the 2016 Book of Discipline (§258.4)?  Yes  No
- b) Names of Officers for 2019
- Chairperson: \_\_\_\_\_ Vice Chairperson \_\_\_\_\_  
 Treasurer(s): \_\_\_\_\_ Financial Secretary \_\_\_\_\_

### II. Budget and Commitment Plan

- a) How frequently does the Financial Secretary/Treasurer send members and contributors regular reports of their giving?
- Monthly  Quarterly  Semi-annually  Annually  We do not send reports
- b) What are the plans for raising sufficient funds to meet the budget adopted by the Church Council (§258.4)?
- c) Does the Financial Secretary/Treasurer report regularly to the Church Council on the giving trends in the church/charge?  Yes  No If not, why not?

### III. The Handling of Church Funds

- a) Does the Treasurer regularly make reports to the Committee on Finance and the Church Council on the financial position of the church (§258.4b)?  Yes  No  
If not, why not?
- b) Will your church pay 100% of their Tithe and District apportionments in 2018?  Yes  No If not, why not?
- c) What bank(s) have been designated by the Church Council as a depository (§258.4d)?
- \_\_\_\_\_
- \_\_\_\_\_
- d) Church must have a Financial Control Policy on file, as well as an Accountable Reimbursement Policy (if applicable). Policies must be reviewed and signed by your pastor and finance chairperson and submitted to the district office on a yearly basis.
- e) Are the church offerings counted by a counting committee of at least 2 (two) unrelated individuals? (§258.4a)?
- Yes  No List names: \_\_\_\_\_
- \_\_\_\_\_
- f) Are all funds deposited promptly in accordance with procedures developed by the Committee on Finances (§258.4a,d)?  Yes  No

g) Are financial officers of the church bonded (§258.4b)?  Yes  No

If not, why not?

h) Have the financial records of the church and all its organizations been audited (or financially reviewed) for the prior fiscal year (§258.4c)?  Yes  No

a. If not, why not?

b. When will you conduct an audit or financial review?

c. Were there any recommendations or exceptions?  Yes  No

d. If there were recommendations or exceptions, how has the church addressed them?

\_\_\_\_\_ Finance Chair (printed) \_\_\_\_\_ Signature \_\_\_\_\_ Date