



North Carolina Conference
The United Methodist Church

2020 Charge Conference Training

Part 2: Church Reports

Annual Report of the Board of Trustees

Camping/Retreat Ministries

High School Seniors/College Students

Lay Members of Annual Conference

Nominations Report

Parsonage Checklist

Report of the Finance Committee

Safe Sanctuaries Report


State of the Church Report


Please note ALL Charge Conference reports MUST be completed 14 days before your scheduled Charge Conference.


Where to find your Charge Conference reports?


- Go to the Conference website: nccumc.org
- Scroll down to the “Helpful Resources” section and click on “Online Data Collection”:

HELPFUL RESOURCES


 Church Lookup

 Media Center

 Pastor Lookup

 Online Data Collection

The church Charge Conference reports can be accessed using the pastor username and password or the church username and password to gain access to the Online Data Collection System (OLDCS)

 **Online Data Collection**
North Carolina Conference
THE UNITED METHODIST CHURCH

Username

Password

LOG IN

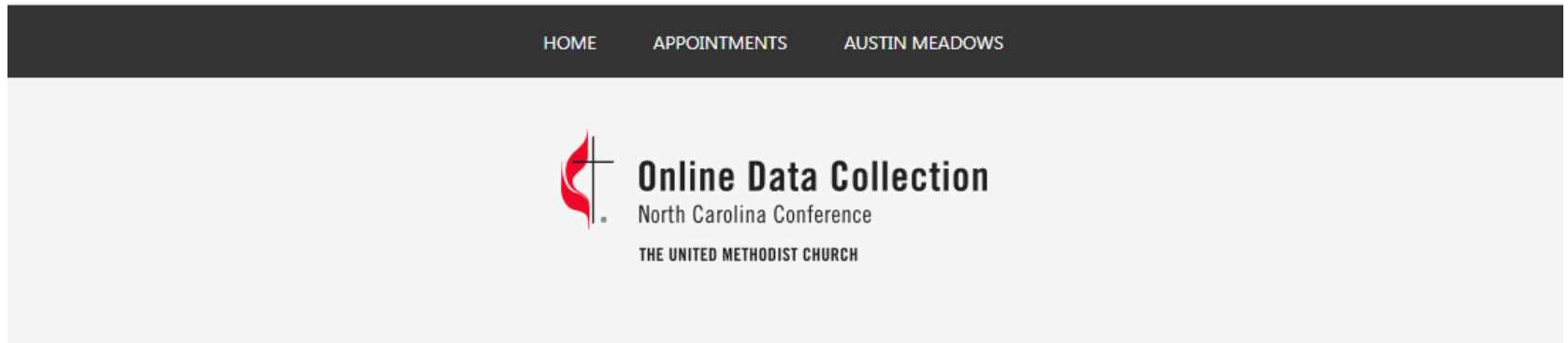
[Forgot your Username/Password?](#)

If you have forgotten the username or password for your pastor or church account, the pastor should click the “Forgot your Username/Password” link.

The password or username reset link will be sent to the pastor’s Conference email.

The password reset link is only valid for one hour.

Once you successfully enter the church username & password, this main page will open for you in OLDCS

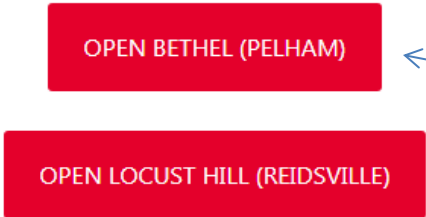


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Clergy related Charge Conference Reports, Compensation information, Conference Journal records, and biographical information may be found by clicking the Personnel button below.



Annual Audits, Church related Charge Conference Reports, Statistical Tables, and Online Payments for your church(es) may be found by clicking the church button(s) below.



For this training session, we will explore the reports in the CHURCH tab.

Now, let's see where to find the church Charge Conference reports:

Online Data Collection
North Carolina Conference
THE UNITED METHODIST CHURCH

Bethel UMC (Pelham)

[Main Menu](#)

CHURCH
CORRIDOR

DISTRICT
CASWELL

COUNTY
GCFA

LOCATION

About	Appointments	Audits	CC Reports	Contact	Donations	Leadership
Payments	Remittances	Statements	Statistical Tables	Websites		

The resources shown below are found at the bottom of the church's Charge Conference page.

Reviewing these resources before you begin and complete your church Charge Conference reports will prove beneficial to you.

Additional Resources

- [2020 Charge Conference Checklist](#)
- [2020 Charge Conference – Committee Meetings Advice](#)
- [Planning and Preparing for your 2020 Zoom Virtual Charge Conference](#)

The first step is to review and update the church leadership for the Nominations report.

Charge Conference Reports

Complete the following reports prior to your scheduled Charge Conference (date below). Contact your Administrative Assistant to The District Superintendent (AADS), if your charge conference date is not listed. All Charge Conference reports are due to be completed seven days prior to your scheduled date.

Charge Conference Date: 10/03/2020

Step One: Review and Update Church Leadership

The Church Leadership page outlines all of your church officers. Many of them will be used during the Charge Conference Process. Please check your church leadership and make sure that all of your leadership information is up to date since the information contained in this report was entered in 2019.

[UPDATE LEADERSHIP MENU](#)

Leadership Menu

Selected church: 18 - Bethel UMC (Pelham)

To add a person not shown in your list from last year, click "Add New Person"

To make changes or delete names, click the "Edit" link

Current List

[ADD NEW PERSON](#)

Name	Address	Email Phone Number	Youth Young Adult	Gender	Office(s) (Class)	Edit
					Lay Member of Annual Conference	Edit
					Education/Nurture Chairperson Finance Chairperson	Edit
					Treasurer	Edit
					PPRC Chairperson	Edit
					Trustees Chairperson	Edit

When first opened, this page will display the 2019 Lay Leadership

Once you have updated your lay leadership for 2021 and made any necessary additions of names, review the list once more for accuracy.

Name	Address	Email Phone Number	Youth Young Adult	Gender	Office(s) (Class)	Edit
					Lay Member of Annual Conference	Edit
					Education/Nurture Chairperson Finance Chairperson	Edit
					Treasurer	Edit
					PPRC Chairperson	Edit
					Trustees Chairperson	Edit

Return to Church Record
Main Menu




Then click, "Return to Church Record" to continue working on Charge Conference reports.

Now you are ready to move to Step 2 where you will complete the church's Charge Conference reports:

Step Two: Complete Reports Before Charge Conference

Review/Complete the following reports. You may review reports from previous years here: [Print Past CC Reports.](#)

Note you can view previous year's Charge Conference reports by clicking this link in OLDCS.

- Annual Report of The Board of Trustees -   
- Camping/Retreat Ministries -   
- High School Seniors/College Students -   
- Lay Members of Annual Conference -  
- Minutes of The Charge Conference -   
- Nominations Report -  
- Parsonage Checklist -  
- Report of The Finance Committee -   
- Safe Sanctuaries Report -   
- State of The Church Report   

Annual Report of the Board of Trustees

Click on “Annual Report of the Board of Trustees” and enter the requested information for this report. You will note that this report has been cleared from last year. Enter the dates for this report at the top of the report as well as the date in question 1 and update any information that has changed since last year’s report. The beginning period for this report should be January 1, 2020 and the ending date should be the date of your 2020 Charge Conference.

Annual Report of The Board of Trustees

Selected church: 18 - Bethel UMC (Pelham)

[View Printable Page](#)

[View Past Charge Conference Reports](#)

[Church Detail Record](#)

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* = *required field*

For the period beginning * and ending *

Form complete

SAVE

Once you have entered all information for this report, click the “Form Complete” box and then click the red “SAVE” button.

Camping and Retreat Ministries

Click on “Camping and Retreat Ministry Report” to enter the requested information. The names entered on this report from last year have not been cleared. If you choose to remove all the first grader info that was entered last year, click the “Purge First Grade Records” box. Click on the “Add A Person” link in order to enter the names of the families which have first grade children in your church for the 2020 year. You will need to click the “Add A Person” link for each family you need to enter.

Camping and Retreat Ministry Report

Selected church: 18 - Bethel UMC (Pelham)

2020 Charge Conference

ADD A PERSON

PURGE FIRST GRADE RECORDS

For churches with more than 25 records to enter:

Records Import

If you are entering information for more than 25 records you may consider using an import file. Use the information below to build a file using the required format. Email your information to support@nccumc.org when complete.

- [Online Data Collection System Import Guide](#)
- [Sample Camping/Retreat Ministries Import File](#)

Form complete

SAVE

Once you have entered all information for this report, click the “Form Complete” box and then click the red “SAVE” button.

High School Senior/College Students

Click on “High School Senior/College Students to enter the requested information. The names entered on this report from last year have not been cleared. You will be able to promote all the students you entered last year to the next grade by clicking on the “Promote High School Students” button. Click on the “Add A Student” link to enter the names of any high school or college students who were not on your list last year. Click the “Add A Student” link for each new student you need to enter.

High School Seniors/College Students Report

Selected church: 18 - Bethel UMC (Pelham)

2020 Charge Conference

Please note: Information entered on this report will be shared with Wesley Fellowship Foundations

ADD A STUDENT

PROMOTE HIGH SCHOOL STUDENTS

Form complete

SAVE

Once you have entered all information for this report, click the “Form Complete” box and then click the red “SAVE” button.

Lay Members of Annual Conference

Click on “Lay Members of Annual Conference” report to enter the requested information. The name(s) which appear on this report are pulled from the Church Leadership page (completed in Step 1). To add/edit a name, you must visit the Church Leadership page.

Remember each charge is entitled to one lay member per appointed clergy person to your church. For Charges, please enter your Lay Member(s) to Annual Conference on the report from which church they are a member.

You have entered the correct number of Lay Members.

You will have a green box at the top of the report if you've entered the correct number of Lay Members to AC

Lay Members of Annual Conference

Selected church: 18 - Bethel UMC (Pelham)

2020 Charge Conference

Lay Equalization Plan Statistics

Number of churches on this charge: 2

Number of clergy appointed to this charge: 1

Total Lay Members of Annual Conference entered (on all churches on this charge): 1

The Lay Members to Annual Conference report is never locked so that churches can make any necessary changes throughout the year.

Current List

Name	Address	Email Phone number	Grade 6-12
[Redacted]			No

Minutes of The Charge Conference

Click on “Minutes of the Charge Conference” to enter the requested information. Fill in the information on the form starting with the line that asks for the name of the Recording Secretary and continue to the end of the report.

The information from the Pastor(s) Compensation Worksheet and Church Officers report will auto-fill the Minutes.

As per the *Book of Discipline*, the names of the committee members for the Committee on Nominations and Leadership Development, Committee on Pastor-Parish Relations, Committee on Finance and the Board of Trustees must be approved at the Charge Conference. These names will also auto-fill this report from the Church Leadership section.

Minutes of The Charge Conference

Selected church: 18 - Bethel UMC (Pelham)

Other areas that you may need to complete on the Minutes report:

- If your pastor wishes to have a housing exclusion, this can be voted on at the Charge Conference and there is a text box to enter the amount approved.
- If your church has any first time or continuing candidates for ministry, you will need to enter their names.
- If your church has any Certified Lay Servants, Certified Lay Speakers or Certified Lay Ministers, you will need to enter their names.
- If you have names to be removed from the church membership record, you will need to enter those in the text box provided.

Minutes of The Charge Conference - continued

- This year since all Charge Conferences are being held virtually through Zoom, at the conclusion of the Charge Conference, the pastor, recording secretary, the Zoom screen sharer and the District Superintendent will remain on the meeting so that the names of those attending the Charge Conference can be entered into the “Attendance” text box.

Form complete



Once you have entered all information for this report, click the “Form Complete” box and then click the red “SAVE” button, while the DS is on the Zoom meeting with you.

- **It is imperative that you make sure all the information on the Minutes report is completed 14 days before the Charge Conference so that your Administrative Assistant to the District Superintendent (AADS) can check the report.**
- **The Minutes report will be displayed for all who can join the Charge Conference by video and will need to be mailed to all who will need to call into the Charge Conference.**

Nominations Report

Click on “Nomination Reports” to view what has been entered in the Church Leadership page in step 1 of the Charge Conference instructions.

To edit/add any names to the Nominations Report, return to the Church Leadership page to enter those changes.

Nominations Report

2020 Charge Conference

Form complete

SAVE

Once you have verified the accuracy of all information in this report, click the “Form Complete” box and then click the red “SAVE” button.

[Parsonage Checklist](#)

Click on “Parsonage Checklist” to enter the requested information. The information from last year’s Parsonage Checklist has been cleared since this form must be completed every year in totality.

Parsonage Checklist

Selected church: 18 - Bethel UMC (Pelham)

If you’d like to print out a blank sheet for the committee to use, click here.

[Blank 2020 Parsonage Checklist](#)

Data Entry Instructions

Answer the following question.

- Does your church have a parsonage?*

You must complete this form even if your church does not provide a parsonage for the pastor(s) by answering the first question.

SAVE STEP ONE

Historical Parsonage Checklists

Print Historical Parsonage Checklist reports.

You can view previous year’s parsonage checklists here

Annual Report of The Finance Committee

Click on “Report of the Finance Committee” to enter the requested information. The beginning period for this report should be January 1, 2020 and the ending date should be the date of your 2020 Charge Conference.

Annual Report of the Committee on Finance

Selected church: 18 - Bethel UMC (Pelham)

[View Printable Page](#)

[View Past Charge Conference Reports](#)

[Church Detail Record](#)

[Main Menu](#)

Form complete

SAVE

Once you have entered all information for this report, click the “Form Complete” box and then click the red “SAVE” button.

Safe Sanctuaries Report

Click on “Safe Sanctuaries” report to enter the requested information.

Safe Sanctuaries Report

Selected church: 18 - Bethel UMC (Pelham)

2020 Charge Conference

[View Printable Page](#)

[View Past Charge Conference Reports](#)

[Church Detail Record](#)

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Form complete

SAVE

Once you have entered all information for this report, click the “Form Complete” box and then click the red “SAVE” button.

State of The Church Report

Click on “State of the Church” report to enter the requested information. You will note that this report has been cleared from last year. This report should be completed by the Pastor Parish Relations Committee (PPRC) in conjunction with the Pastor and then shared with the Administrative Council.

State of The Church Report - Step One

Selected church: 18 - Bethel UMC (Pelham)

[View Printable Page](#)

[View Past Charge Conference Reports](#)

[Church Detail Record](#)

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[Step One](#) | [Step Two](#)

Be mindful that this report has two steps to complete.

Once you have entered all information required for this report, click the “Form Complete” box and then click the red “SAVE” button.

Form complete








SAVE

RESET

Once you've completed the 10 church Charge Conference reports, go back to the main "Charge Conference" tab and make sure that all your reports have been completed and saved so that you have green checkmarks, as shown below:

Step Two: Complete Reports Before Charge Conference


Review/Complete the following reports. You may review reports from previous years here: [Print Past CC Reports](#).

- Annual Report of The Board of Trustees -   
- Camping/Retreat Ministries -   
- High School Seniors/College Students -   
- Lay Members of Annual Conference -  
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- Nominations Report -  
- Parsonage Checklist -  
- Report of The Finance Committee -   
- Safe Sanctuaries Report -   
- State of The Church Report   

The proceed to Step Three on the main “Charge Conference” tab to ensure that the pastor(s) have completed their “Report of Pastoral Ministry”, as shown below:

Step Three: Verify Report of Pastoral Ministry


All appointed pastors must have completed their Report of Pastoral Ministry prior to Charge Conference.

Pastor	Report Complete
Austin Meadows (Austin)	

If you serve a Charge, such as the example before you of the Bethel/Locust Hill Charge, you will need to complete these same Charge Conference reports for each church on the Charge.

Locust Hill UMC (Reidsville)





















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CHURCH  DISTRICT CORRIDOR COUNTY CASWELL GCFA 

LOCATION 

About	Appointments	Audits	CC Reports	Contact	Donations	Leadership
Payments	Remittances	Statements	Statistical Tables	Websites		

Review/Complete the following reports. You may review reports from previous years here: [Print Past CC Reports](#).

- [Annual Report of The Board of Trustees](#) -   
- [Camping/Retreat Ministries](#) -   
- [High School Seniors/College Students](#) -   
- [Lay Members of Annual Conference](#) -  
- [Minutes of The Charge Conference](#) -   
- [Nominations Report](#) -  
- [Parsonage Checklist](#) -  
- [Report of The Finance Committee](#) -   
- [Safe Sanctuaries Report](#) -   
- [State of The Church Report](#)   

After the Charge Conference, while the Pastor, Recording Secretary, Zoom Screen Sharer and DS are still on the Zoom meeting, you will be asked to complete Step Four and “Finalize and Submit” Your Charge Conference Reports.

Step Four: Finalize and Submit Your Charge Conference Reports

You will finalize and submit your Charge Conference reports immediately following your Zoom Charge Conference with the pastor, recording secretary, Zoom screen sharer, and DS. Your DS will notify the Administrative Assistant to the DS (AADS) if your Charge Conference reports are not able to be finalized and submitted immediately following the Charge Conference. The AADS will work with you to get the reports completed within seven days.

FINALIZE AND SUBMIT YOUR CHARGE CONFERENCE REPORTS

Q: Who should I contact if I need help with my church Charge Conference reports?

**A: Call or email the District Office
districts@nccumc.org
919-779-9435 or
888-661-4941 (toll free)**

A: Or email support@nccumc.org

You can also contact your Administrative Assistant to the District Superintendent (AADS) for any questions related to Charge Conference reports.

**Beacon/Sound AADS
Ashley Kennedy**



akennedy@nccumc.org

**Capital/Fairway AADS
Nancy Martinez**



nmartinez@nccumc.org

**Corridor/Heritage AADS
Sarah Carter**



sarah.carter@nccumc.org

**Gateway/Harbor AADS
Mary Hartsell**



mhartsell@nccumc.org

You may contact your AADS directly by email or by calling the District Office and ask to be connected to their extension. 919-779-9435 or 888-661-4941 (TF)