North Carolina Conference
The United Methodist Church

2021 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":
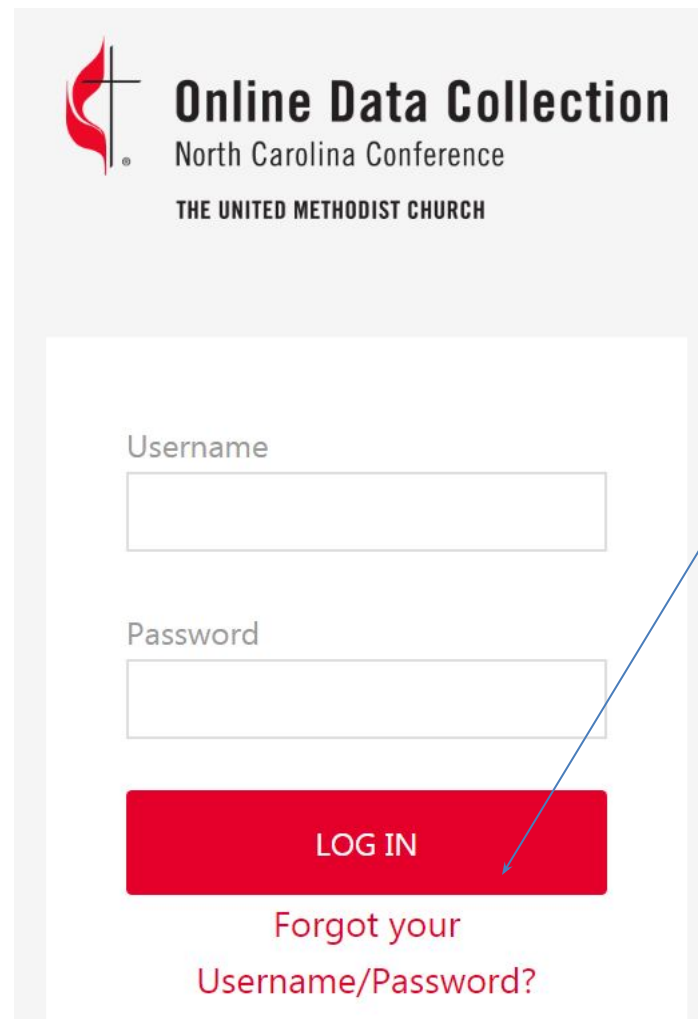
HELPFUL RESOURCES

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

HOME   APPOINTMENTS   AUSTIN MEADOWS

Online Data Collection
North Carolina Conference
THE UNITED METHODIST CHURCH

Main Menu

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

OPEN PERSONNEL RECORD

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.

OPEN BETHEL (PELHAM)

OPEN LOCUST HILL (REIDSVILLE)

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:

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

- 2021 Charge Conference Checklist

- 2021 Charge Conference – Committee Meetings Advice

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 fourteen days prior to your scheduled date.

Date | 10/18/2021   Time | 6:00 PM

Step One: Review and Update Church Leadership

The Church Leadership page outlines all of your church officers - many of whom will be used during the Charge Conference Process. You must check your church leadership report and make sure that all of your information is up to date.

UPDATE LEADERSHIP MENU

Several Updates have been made to this Report. One is an accommodation made for churches utilizing an alternative leadership structure previously approved by the DS. For these churches, contact information is collected for all committee members. The other change this year affects the traditional leadership structure: Committee members' mailing addresses, email addresses, and telephone numbers will not be required. Email addresses and telephone numbers will only be required for Chairpersons, Lay Leaders, and Annual Conference Delegate(s).

Leadership Menu

Selected church: 8 - Front Street UMC (Burlington)

Return to Church Record
Main Menu

This form collects contact information regarding the leadership of your local church. You must enter the name, email address, phone # & physical address for your lay leadership since the Conference uses this info to generate mailing/calling lists for District communications and utilized by your DS or AADS for contact info. It is not required to enter contact information for committee members (only committee chairs). Include in this list everyone you would like to receive information for that particular office. Assign as many offices to a person as applicable.

The NC Conference is committed to using any contact list in accordance with our privacy policy.

Alternate Leadership Structure

Does your church use an alternate plan, model, or structure for leadership? If so, click the button below to report your alternate leadership structure.The Minutes and Nomination Reports will be modified to reflect your leadership structure.

EDIT STRUCTURE

Click "Edit Structure" if your church uses an approved alternate leadership structure.

Data Entry Instructions

= required field

The Book of Discipline of The United Methodist Church (2016), each charge has some flexibility in determining the structure and organization for the administration within the local church. Paragraphs 243, 244 and 247.2 in particular give each individual local church the latitude to develop a system of governance and leadership that allows the church to be more efficient and effective in ministry.

☐ An alternate leadership structure has been adopted for this church. *

When was this structure approved?*

Which District Superintendent approved this structure? *

Briefly describe your approved leadership structure. *

Be sure to enter when the alternate leadership structure was approved by the DS.

SAVE

You must provide the name of the DS in this box.

Offices

Select all offices for which this person serves.

Administrative Council

Your church/charge is using an Alternate Leadership Structure. Under this structure, there is a single administrative committee for the entire church/charge. The following offices are recorded under this structure.

The following positions must be held by different individuals.

- Administrative Committee Chairperson
- Lay Leader
- Treasurer
- PPRC/SPRC Representative

These positions must be held by different individuals.

Persons may hold multiple roles within this group and may also hold one of the roles from the above list.

- Lay Member of Annual Conference
- Trustees Representative
- Finance Representative
- Stewardship Representative
- At-Large Member

Leadership Menu

Selected church: 18 - Bethel UMC (Pelham)

Current List

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

ADD NEW PERSON

When first opened, this page will display the 2021 Lay Leadership

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

Once you have updated your lay leadership for 2022 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 or 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.

- 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

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

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, 2021 and the ending date should be the date of your 2021 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
Main Menu

* = required field

For the period beginning [   ] * and ending [   ] *

Form complete ☐

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

SAVE

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 2021 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)

2021 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.For new entries....we are only requiring them to enter students at the schools with an active Wesley Fellowship on campus

High School Seniors/College Students Report

Selected church: 18 - Bethel UMC (Pelham)

2021 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)

2021 Charge Conference

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

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

Current List

Name	Address	Email Phone number	Grade 6-12
			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

- At the conclusion of the Charge Conference, the pastor, recording secretary, the Zoom screen sharer (if held virtually) 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 and make other corrections if needed and update other business if applicable..

Form complete ☐

SAVE

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

2021 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)

2021 Charge Conference

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

Blank 2021 Parsonage Checklist
View Past Charge Conference Reports
Church Detail Record
Main Menu

You must complete this ~~church does not provide a pastor(s) by answering t~~

* = required field

Data Entry Instructions

Click the button below to begin the Parsonage Checklist.

START PARSONAGE CHECKLIST

Blank 2021 Parsonage Checklist
View Past Charge Conference Reports
Church Detail Record
Main Menu

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, 2021 and the ending date should be the date of your 2021 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)

2021 Charge Conference

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.

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

Main Menu

Be mindful that this report has two steps to complete.

Step One | Step Two

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 -
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- Report of The Finance Committee -
- Safe Sanctuaries Report -
- State of The Church Report

Then 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)

Main Menu

| CHURCH | DISTRICT | COUNTY | GCFA |
| | CORRIDOR | CASWELL | |

LOCATION

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| 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 (if held virtually) 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

Capital/Fairway AADS
Nancy Martinez

Corridor/Heritage AADS
Sarah Carter

Gateway/Harbor AADS
Mary Hartsell

akennedy@nccumc.org

nmartinez@nccumc.org

sarah.carter@nccumc.org

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)**