

Catawba Valley District

2021 Charge Conference Submission Instructions

Charge Conferences must be held between September 10 and November 14. All items required on the Charge Conference Checklist must be completed and submitted online **no later than November 18**.

NO PAPERWORK IS TO BE TURNED IN TO THE DISTRICT OFFICE.

Detailed Steps for 2021 Charge Conference:

1) **SELECT YOUR CHARGE CONFERENCE DATE BY SEPTEMBER 1:** Select and request your date for your charge conference. Use special care in choosing the date for your conference – **once authorization is emailed, DATES MAY NOT BE CHANGED EXCEPT UNDER EXTRAORDINARY CIRCUMSTANCES**. Official authorization letters will be emailed on or around September 1.

2) **CHARGE CONFERENCE REPORTS:**

There are 3 major components of Charge Conference reports:

- **Clergy Compensation** (to be completed 10 days **before** your Charge Conference)
- **Church Leaders** list (to be completed 10 days **before** your Charge Conference)
- **Other Charge Conference reports**

Go to the Church Dashboard for each church in your charge (www.wnccumc.org/dashboard) to complete all forms, and to complete the online sections for clergy compensation and the Church Leaders list. Look under “Submittable Forms” for the 2021 Charge Conference forms link.

See detailed steps for each component below.

1. CLERGY COMPENSATION (REQUIRED TEN (10) DAYS IN ADVANCE):

- Access the clergy compensation form from either the Clergy Dashboard or the Church Dashboard (contact the District Office if you have trouble logging in)
- Look for “2022 Clergy Compensation” and click “Start” to begin a new clergy compensation form for 2022
- Check the first screen to be sure your information is correct. If not, go no further and notify Jana at the District Office. If correct, click “next” in the lower right corner.
- Enter the start date by clicking on “Select Date” and then choosing **January 1, 2022**. Click “next.”
- Enter the required information through the rest of the form, clicking “next” or “prev” to move throughout the form.
- If you are eligible for pension, you are encouraged (but not required) to enter at least 1% of your “Pension Plan Compensation” (line 6b) into line 3a (Salary Reduction for UM PIP).
- “Household Expense Allowance” and “Housing in lieu of parsonage” are DIFFERENT.
 - **Household Expense Allowance** (3g) = part of the “salary reduction agreement”. This line lowers your taxable wages, and can include household expenses, ie: lawncare, light bulbs, power, gas, water, etc. All clergy can use this salary reduction if desired. The church still pays this amount to you, but it is not included as taxable income. YOU are accountable to the IRS to provide documentation to support this reduction should they ever require it.
 - **Housing in lieu of Parsonage** (5d) = monies paid to you by the church, IN ADDITION to salary (Line 1 Total Amount Compensation), specifically for housing allowance when a parsonage is not provided.
- PAY CLOSE ATTENTION to line 6a (“Does Pastor live in Parsonage?”). This line may affect your pension calculation / contribution from the conference. Be sure to enter it correctly.
- Click the Save button to save your work.
- Click the button to save your work, and click the SUBMIT button to submit your DRAFT 10 days before the CC
- Do not complete the section “Approvals/Submissions” until ***AFTER*** your charge conference and all compensation numbers have been approved

2. CHURCH LEADERS (REQUIRED TEN (10) DAYS IN ADVANCE):

**You will NOT find the Church Leaders list as part of the “2021 Charge Conference Forms”. From your Church Dashboard, select “Church Leaders” (left column)

- Select either “Edit Assignment” or “Add New Assignment”
- It is VERY IMPORTANT that you provide updated, accurate & complete contact information. **We especially need email addresses** for all church leaders. Please make special efforts to get email addresses. If the chair or leader does not have an email, please use an email address for another person who agrees to receive email on their behalf. It could be another committee member, or church council member, etc.

- The following offices are required:

- Chair of Governing Body (Ch. Council, etc.)/Contact
- Church Secretary
- Church/Charge Lay Leader
- Finance Chair (Local Church)
- Finance Secretary
- S/PPRC (or Contact person if chair does not have email or if there is a Charge PPRC chair for multi-church charge)
- Treasurer (Local Church)
- Trustees Chair (Local Church)

- Use the “End Date” to “end” an assignment for someone. Ex. if they are leaving the position on 12/31/2021, be sure to indicate that. They will automatically be removed from the position on that date.

- If a leader is continuing in a position, be sure their End Date is **left blank** (or fill in an end date ONLY if you know for sure what year they will end that position).

- Be sure that none of your leaders have an end date of 2021 unless they are leaving their role at the end of this year.

Otherwise, leave the end date blank.

- You can leave all other items blank.

Church Leadership

Save

Brick River ID

People

Assignment Dates ▾

Start

End

Please DO NOT enter an end date, unless you know for sure when this person will finish serving in this position.

Ad-Interim Addition

Church Leader Assignment ▾

Position

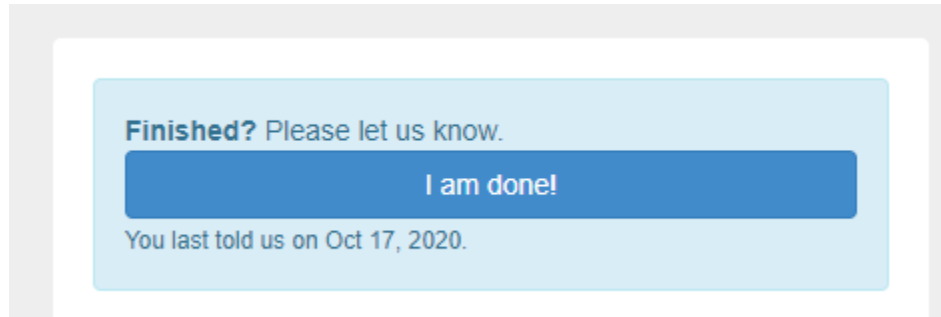
Role

Notes

Save

- To add a new church leader, click the green button “Add New Assignment”. Select the position you are adding. If the person you want to select is already in your church list, click “Pick this Person.” If they are not on your church list, check to see if they are in our entire conference database by typing their name in the box at the bottom of the screen. **Be careful – if your person shows up in this database, be sure it is the right person and not someone with the same name. If they are not in our entire conference database, click “Add a brand new person to our database”. Enter their contact information and click “Add new contact and create assignment.”

- Click the blue “I am Done!” button in the right hand corner to indicate that your Church Leaders list is up-to-date.



3. CHARGE CONFERENCE REPORTS:

Charge Conference reports will be completed directly online. This means that someone from your church will input all the data that is found on each committee report. You can designate one person, or you can have each committee chair input the data for their own committee. **Forms should be mostly completed online before the actual Charge Conference is held.**

- From your Church Dashboard, click “Submittable Forms” (notify the district office if you need help logging in)
- Click “2021 Charge Conference Forms” – You can share these forms with other persons in your church for completion via the “Share This” link
- Below is a listing of the reports in this section – click “Start this Form” for each
 - Agenda and Minutes for Charge Conference (use this to conduct your Charge Conference)
 - Charge Conference Checklist
 - Complete List of Church Committees/Teams (*This is NOT your “church leaders” form which must be updated / submitted through the Church Dashboard)
 - Fund Balance Report (for the previous year)
 - Report of the Finance Committee
 - Report of the Parsonage Committee (if applicable)
 - Report of the Pastor
 - Report of the Trustees
 - Safe Sanctuaries
- Click “Edit/Review This Form” for each form to begin working on it. The information from LAST YEAR will appear in the form. Be sure to review and make all needed updates and corrections.
- Click “Save Your Progress” to save.
- **To print a copy of a form** in order to write on it before filling it out online, click “Review and Print” to open the form. Click “Print Full Size” or “Print Condensed” (at the top of the screen). You can enlarge the size of the printout by choosing “advanced options” on the print dialog box.

AFTER YOUR CHARGE CONFERENCE:

- All required Charge Conference reports, forms, and required minutes must be completed and submitted **BY THE EARLIER OF: (1) two weeks after the date of your charge conference, or (2) November 18**. No paperwork will be accepted in the district office.
- Complete & submit your Clergy Compensation form:
 - CLICK the red “SUBMIT” button now that all has been approved.
 - Enter the names of the clergy, the treasurer, and the PPR chair to indicate their approval, and click “Submit with signatures for final approval” to submit.
 - CLICK THE RED “SUBMIT WITH SIGNATURES FOR FINAL APPROVAL” BUTTON
 - After you have submitted, the district office will review & approve the clergy comp form. You can open yours back up to see when the DS has approved the form, and then print that for your records if so desired.

Status Draft Submitted

Signatures

Do NOT complete this section until your Charge Conference has voted and approved the draft.

Please enter the names as digital signatures of the people signing the document. By writing their name, each individual has given their consent that the document has been completed to the best of their knowledge. Each person understands that this data at the time of signature will be used by the WNCC benefits administrator.

Clergy Name This field is required

Treasurer Name This field is required

SPPRC Name This field is required

Submit with Signatures for Final Approval

- Officially Submit your Charge Conference Reports
 - On your Church Dashboard go to “Submittable Forms”
 - Once all forms have been completed you are ready to submit and you will see the blue button below:
 - Enter YOUR NAME in “Submitted By” then click the “Officially Submit My Form(s)” button.

Your progress: READY FOR SUBMISSION

Ready to submit your forms? If you have completed all your forms and are ready to submit them, enter your name

Submitted By **Officially Submit My Form(s)**

- Once you have submitted your reports, check back in a few days to your Submittable Forms, click on the 2021 Charge Conference Reports, and scroll to the bottom to see this message:

Your progress: *SUBMITTED ON 10/15/2019*
APPROVED ON 10/16/2019 BY JANA ALEXANDER

- You are now completely done with charge conference reporting!

As always, don't hesitate to call Jana Alexander at the District office (704-865-3580) if you have any questions!