

# MUMC

# Leadership Development Handbook

March 2023



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# Contents

LEADERSHIP - BLESSED TO BE A BLESSING .....	4
MUMC DECISION PROCESS .....	5
Purpose .....	5
LEADERSHIP DEVELOPMENT TEAM .....	6
Purpose .....	6
Leadership Positions .....	6
Elements of a Role & Responsibility Description .....	7
Identify Leaders .....	7
Develop Leaders.....	8
Support Leaders.....	9
WHAT IS EFFECTIVE LEADERSHIP .....	10
Defining Effective Leadership Development (LD) .....	10
Leadership Development Success Criteria:.....	10
ELECTED LEADERSHIP PROCESS TIMELINE .....	12
Leadership Development Team – Key Activity by Month.....	12
ELECTED LEADERSHIP ROLES & RESPONSIBILITIES .....	14
Our Rule of Life .....	14
Attributes for Service.....	14
ROLES AND RESPONSIBILITIES .....	16
Administrative Council Servant Leader.....	16
Lay Leader .....	16
Administrative Council Member .....	17
Finance Ministry Team Servant Leader.....	18
Finance Ministry Team Member.....	18
Staff Parish Relations Committee Servant Leader .....	19
Staff-Parish Relations Committee Member .....	20
Trustees Ministry Team Servant Leader .....	20
Trustees Ministry Team Member.....	22
Leadership Development Team .....	22
Lay Delegate to Annual Conference.....	22
Global Impact Team Servant Leader (Missions).....	23
Global Impact Team Member (Missions).....	24
Endowment Ministry Team Servant Leader .....	24
Endowment Ministry Team Member.....	25
APPENDIX.....	26
<b>MUMC STAFF LIST Staffing Model as of March 23, 2023 .....</b>	<b>27</b>

LEADERSHIP RECOMMENDATION FORM.....	29
FIRST LETTER TO CANDIDATE.....	30
SAMPLE QUESTIONS FOR CONVERSATION WITH CANDIDATES .....	31
CANDIDATE CONVERSATION FORM.....	32
LETTER TO KEY LEADERS .....	33
CHURCH LEADERSHIP COVENANT .....	34
LEADERSHIP SUPPORT DISCUSSION CHECKLIST.....	35
NEW LEADER ORIENTATION .....	36
ADDITIONAL RESOURCES FOR LEADERS .....	37
SOURCES FOR THIS DOCUMENT .....	37

# LEADERSHIP - BLESSED TO BE A BLESSING

## Dear Church Leaders:

You are about to read an amazing document on leadership at Matthews United Methodist Church (MUMC). It is born out of the hopes and dreams of a number of folks who care about the leaders in our midst. We know leadership is challenging, engaging, difficult, painful, costly and so rewarding. Leadership is all that when it comes to MUMC but rest assured expectations will be realistic and goals will be reachable. However, when it is all said and done, we want you to be able to say, "That built me up in my spiritual life!"

You are in for the adventure of lifetime ... helping to lead a dynamic, vital, spirit-filled transforming community to make disciples and to make God's love real to our community, to our region, to our world.

You are first and foremost a spiritual leader. Nothing will happen through you unless it has first happened to you. You will not be able to lead people beyond where you've been yourself. Hence, the need for deepening the spiritual life. I will continue to maintain the mantra that the best thing any of us have to bring to leadership is our transforming self. Thus, each of us must be committed to personal and corporate spiritual disciplines that support and catalyze our spiritual transformation.

One ancient practice used by communities of Christians for almost 2000 years is called a **Rule of Life**. The meaning of the word "rule" comes from the Greek word for "trellis." A trellis is a tool designed to enable a grapevine to get off the ground and grow upward, becoming more fruitful and productive. In the same way, a Rule of Life can be the trellis that helps us abide in Christ and become more spiritually fruitful.

We work on these spiritual practices all the time around MUMC. You can read more about them on page 14. These seven time-tested, biblically-grounded spiritual practices are at the heart of a healthy group of leaders and a healthy church. These seven spiritual practices place us in a position of spiritual growth and transformation.

These materials will stretch and cause you to grow. You can't imagine how fortunate MUMC is to have you serving, caring and giving through leadership.

## We are in this together,

Dr. Charles (Chuck) Wilson II  
Chuck@MatthewsUMC.org

# MUMC DECISION PROCESS

The Methodist Church was born in the cauldron of the early days of our country. Our structure and design resemble much of our government branches, i.e., executive (President/Bishop), legislative (Congress/Annual Conference), and judicial (Supreme Court/Judicial Council). Hence, much of what you observe below is an extraordinary system of checks and balances on how decisions are made at Matthews United Methodist (MUMC). It is by no means perfect, but it does provide for accountability at every level. I know you are thankful for it.

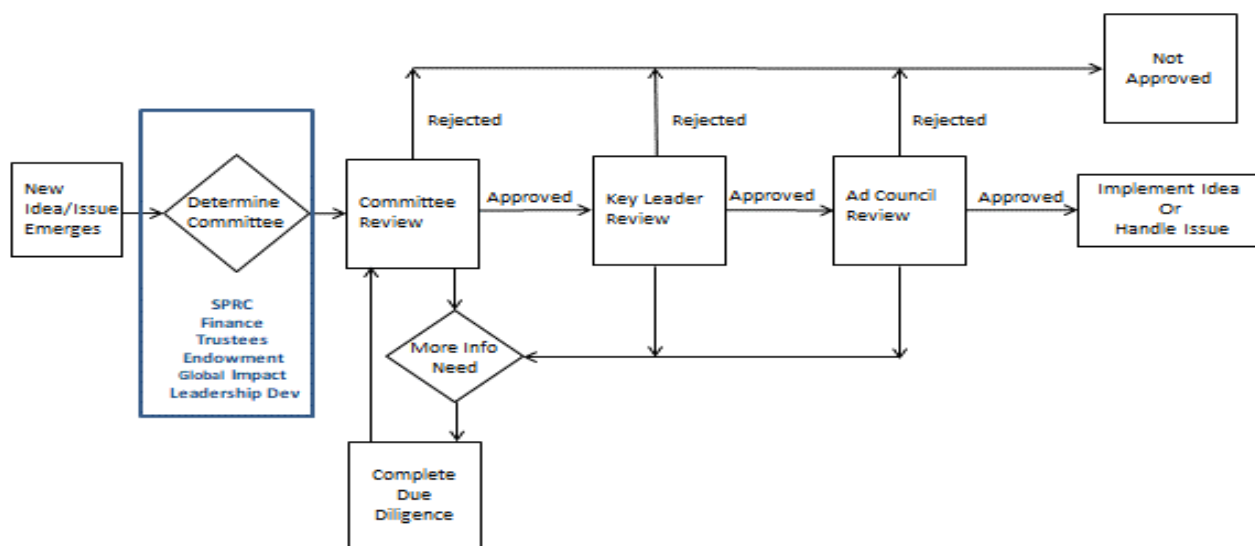
## Purpose

The purpose of the MUMC decision process is to apply and execute a repeatable approach to how new ideas or issues that surface from within the congregation or arise from outside the church are reviewed, vetted and a final decision reached.

Generally speaking, new ideas or issues that come to the church fall into one of the three jurisdictions of responsibility as noted in the table below. Each jurisdiction has people (Staff and Laity) specific to that area responsible for gathering facts and reaching a decision on the path forward based on both the short-term impacts and the long-term viability of the church (see table below).

Pastoral / Staff	Admin Council / Charge Conference	Staff Parish Relations Committee
<ul style="list-style-type: none"> <li>Spiritual / Congregational Care</li> <li>Church Operations</li> <li>Existing &amp; New Ministries</li> </ul>	<ul style="list-style-type: none"> <li>Physical Church Property Usage</li> <li>Capital Improvements &amp; Maintenance</li> <li>Financials / Operating Budget</li> <li>Legal Issues</li> </ul>	<ul style="list-style-type: none"> <li>Salaries (Pastoral &amp; Staff)</li> <li>Personnel Issues</li> <li>Organizational Structure</li> </ul>

- The “Decision Process” depicted in the diagram below addresses only those issues falling under the jurisdiction of the Administrative Council / Charge Conference.
- Key Leaders is a small group made up of the servant leader from each of the committees, the Administrative Council Servant Leader, the laity servant leader and the senior and executive pastors.
- Key Leaders serves as a “due diligence” function prior to issues going to the admin council for the larger group to discuss, debate and provide a final decision on behalf of MUMC.



**Notes:**

- Sharing ideas/issues is encouraged for all members of MUMC. Once the idea is raised to a leader of committee member, the decision making process can begin.
- Due diligence is any process that gathers information to enable the decision making process.
- When possible, the result of the decision making process should be communicated with the person who raised the idea/issue.

# LEADERSHIP DEVELOPMENT TEAM

## Purpose

The Leadership Development Team is responsible to identify, develop and support spiritual leaders as they work to achieve the mission of MUMC. The team should conduct their efforts to increase the effectiveness of laity in leadership roles and demonstrate the inclusive nature of MUMC by rotating members of the church through leadership roles to achieve a goal of having 2-3 percent of the people describe themselves as leaders. Leadership development should consist of both formal processes (specific classes, nomination criteria) and informal connections (mentoring, coaching, observation, and encouragement).

The function of the Leadership Development Team is more than filling empty slots and passing those names to the charge conference. Developing leaders means that you have a role in helping the people of your congregation recognize their value in God's sight, and you can help them become what God intends for them to be. As United Methodists, we believe that God expects us to grow and learn through our whole lives.

The Leadership Development Team is chaired by the senior pastor and should consist of 9 members. One or more member should represent the youth at MUMC, one or more member should represent young adults. The team should reflect diversity and inclusivity of the membership of MUMC.

## Leadership Positions

The following is a list of elected leader positions at MUMC that fall within the responsibility of the Leadership Development Team:

- Administrative Council Servant Leader
- Administrative Council Vice Servant Leader
- Lay Leader
- Vice Lay Leader
- Finance Ministry Servant Leader
- Finance Ministry Vice Servant Leader
- Staff Parish Relations Committee Servant Leader
- Staff Parish Relations Committee Vice Servant Leader
- Global Impact Missions Team Servant Leader
- Global Impact Missions Team Vice Servant Leader
- Trustees Ministry Team Servant Leader
- Trustees Ministry Team Vice Servant Leader
- Endowment Team Servant Leader
- Endowment Team Vice Servant Leader

Pool of candidates for future leadership positions:

- Delegates to Annual Conference
- Admin Council Members at Large
- Committee Representative "At Large" that are not the Servant Leader or Vice Servant Leader

The Leadership Development Team will create and maintain a written "Role & Responsibilities" description for each position which will provide clear expectations for each position so that anyone considering filling a role will have an understanding of what the role entails. It is anticipated the expectations of all roles will change over time to meet changing social, cultural and spiritual expectations of MUMC. To address changing conditions, all Role & Responsibility descriptions will be periodically reviewed to align the written description with current expectations of any position.

## Elements of a Role & Responsibility Description

- **Position Title** - Adapt the title to reflect the unique ministry of your congregation. For example, the church council might be called the leadership team or Administrative Council.
- **Result Expected** - This describes the ministry contributions this position will make to the congregation and the mission of making disciples. An example for a coordinator of older adult ministry is “an effective coordinator will work with church and community leaders of all ages to address the needs and opportunities for older adults to grow as Christian disciples.”
- **Spiritual Gifts and Helpful Qualifications** - This lists the knowledge, skills, and spiritual gifts needed and desired for the position.
- **Responsibilities** - State the specific tasks of this leader or committee. This is a list of tasks assigned by the Book of Discipline or by your congregation to this position. Include specific information on reporting and accountability.
- **Getting Started** - Help a new leader launch the ministry and begin knowledge transfer to the new servant leader as well as new committee members. This might include some things the congregation has done in the past and wants to continue or evaluate. List resources for this ministry and their location. Include the names and contact information of individuals who can help during the transition period as part of the succession plan for the new leader.

The term for each elected servant leader is three years. Exceptions to the typical term can be made to meet the needs of the church and/or to accommodate changes in the personal lives of the leader.

The vice servant leader position may be filled by an existing member of the associated team or from outside the team. The vice servant leader should be used to support the mission of the team by being the representative to other teams. The term of the vice servant leader is one year and should be rotated through the team. A vice servant leader should be appointed to overlap the last year of the servant leader in anticipation of transitioning to the servant leader role. This method will provide a mentoring opportunity and ease the transition from one leader to the next.

Parishioners may be appointed to lead focused, short duration efforts at the discretion of the senior pastor and in consultation with the Key Leaders as warranted. Although the leader of this type of effort does not fall within the structured approach of the Leadership Development Team, the candidate should be screened using the same criteria and provided support commensurate with the effort being led. Consideration should be made to utilize the pool of future leaders to fill leadership roles in these smaller efforts to gain experience.

### Additional Considerations:

- No one will hold more than one elected leadership position at a time.
- An evaluation of the leader and committee members should be conducted to remove any conflict of interests or remove the potential for an imbalance of influence while conducting committee activities.
- Leadership rotation is vital to bring fresh perspective and new ideas to a position. Although it is important for people to fill different roles in order to gain experience as a leader, it is equally important to maintain a flow of new leaders to promote a shared responsibility for leading the church. Consideration should be given to provide leaders with a break between leadership appointments to prevent burnout due to fulfilling consecutive leadership assignments.

## Identify Leaders

The Leadership Development Team has the privilege of helping people hear and respond to the call of God by linking their gifts, strengths, talents and abilities to meet leadership needs within the MUMC congregation and community. The development of church leaders will broaden the talent base of the Church and lead to more active engagement of a diverse group of members.

Potential leaders can be identified by several methods. Parishioners should be encouraged to express their interest to a member of the Leadership Development Team if they feel a calling to serve as a leader. Talent surveys can be utilized to invite people to reflect on their stewardship of the membership vow to participate in ministry through “prayers, presence, gifts, service, and witness” which may include leadership. A nomination process is also used by existing leaders to identify a member of the church who they believe would be a good candidate for a leadership role.

When approaching someone regarding a leadership position, committee members need to frame it as a ministry of service to God's mission and not simply as an elected position. (If it is simply an elected position, either change the position into a vital ministry role or eliminate it!)

### **Considerations for Leadership Roles**

The following are considerations when identifying candidates for leadership positions. In addition to the listed criteria, personal qualities, interests, life experiences, knowledge and skills of the candidate should be considered.

- Must be a member of MUMC for a least one year.
- Evidence of supporting the church through prayers, presence (regular worship attendance), gifts (regular pattern of giving to God through the ministries of MUMC), and service (faithfully serving in an ongoing ministry), and witness.
- Completion of the MAGI Spiritual Gifts Workshop is required, if the candidate has not already done so. The dates are available on the church website under the Teach tab.
- Teachable spirit (still willing to learn new things) and a willing servant's heart.
- Solid, growing relationship with God, through devotion time and continuing Bible study.

MAGI workshops should be utilized to identify members of MUMC with leadership as a spiritual gift. MAGI should be administered by a certified member of the Leadership Development Team, or a certified designee, at least twice a year. Lists of members' MAGI gifts are maintained in Realm by the MUMC Database Administrator.

The LDT should maintain a list of current leaders and leadership candidates. The list should be reviewed as development opportunities arise to match positions with candidates.

Part of the initial discussion is a review of the supportive mission of the LDT so they know that they are not walking alone and to set the expectation there will be ongoing interactions throughout their leadership tenure.

## **Develop Leaders**

Development comes through study and experience. The Leadership Development Team should work with existing church leaders, pastoral staff, and church council members to provide opportunities for leaders to grow in faith and self-understanding while accomplishing the mission of MUMC. The focus would be with an attitude of leadership development rather than "recruitment". Additionally, the Leadership Development Team should create and maintain a connection with all leaders to ensure that growth as a leader continues beyond identification. All existing leadership should demonstrate a willingness to personally develop while also nurturing the development of other members of MUMC through mentoring, coaching, and encouraging.

Christian leadership can be a position of influence, so all leaders need to be aware of their public persona / role. To be a positive influence, leaders treat questions and disagreements with respect and discretion while publicly supporting the essential work of the pastor, the church, and the Methodist denomination.

Leadership development should include spiritual development and skills development. Spiritual development may include many activities including prayer, Bible study, worship, and discipleship. Skill development may include listening, leading a meeting, delegating, organizing, and setting priorities.

The LDT should implement an orientation plan for new leaders to establish a connection with the current Servant Leader and exchange information that will enable the leader to start with the information they need to be successful. Utilize the *New Leader Orientation* form on page #35 to facilitate the orientation discussion. The LDT may consider a workshop for all new leaders instead of conducting orientations separately.



## Support Leaders

Leaders at every level of the organization with all levels of experience need the support of the LDT and the congregation in order to be effective in their role and feel appreciated for their efforts. Support is demonstrated through outward signs of acknowledgement and recognition by members of the clergy and the congregation. Support is demonstrated by the LDT by maintaining connections with the leader and the committee, team or group. This also ensures business is being conducted in an efficient manner, goals are being met, and the leader is effectively leading the group.

Leadership support discussions should be held semiannually with each servant leader and vice servant leader utilizing the *Leadership Support Discussion Checklist* on page #36. Prior to the discussion, information about the leader's performance and committee performance should be gathered to provide feedback to the leader. The support discussion is meant to be a positive experience which demonstrates the common goal of maintaining connections in support of spiritual and leadership skill growth. When opportunities for growth exist, the discussion should include actions to facilitate changes to create better outcomes.

The LDT should conduct a semiannual review of their internal efforts to support MUMC leaders to ensure that support connections have been established and maintained with each leader.

The LDT should working closely with the pastor and church council to plan a time of prayer and commissioning for servant leaders. This could be during a worship service or a part of the charge conference or church council meeting. This public recognition is an opportunity to remind the congregation of their role in leadership support. Occasional recognition reminds people to support and encourage one another.

Here are some ideas for supporting and recognizing leaders:

- Begin the church year with a commissioning service for people who will begin and continue their service.
- Hold an annual service or day of recognition and appreciation.
- Provide ongoing training programs.
- Provide the necessary resources.
- Acknowledge the progress of each person's work and express appreciation.
- At the end of the term, thank the outgoing leaders and workers personally and publicly for their ministry in your church and community.
- Highlight ministry in daily life with website and newsletter articles and pictures.

# WHAT IS EFFECTIVE LEADERSHIP

## Defining Effective Leadership Development (LD)

**Purpose:** Provide guidelines on what “effective” leadership development means and LD areas of responsibility at MUMC. Also, establish LD performance metrics to help the LD team determine when they need to address “in service year” resignations and/or other open leadership positions in the current service year.

### **Guiding Principles:**

- The LD team’s goal is to achieve and maintain a 100% staffing level for all elected leadership positions during the current service year.
- The LD team’s mission is to staff all elected leadership positions with members from our congregation who exhibit a “servant’s heart” for building God’s kingdom here on Earth by meeting the following three (3) elected leadership requirements:
  - 1) Has demonstrated a history of active attendance and engagement at MUMC.
  - 2) Has a demonstrated *regular pattern* of financial giving to MUMC.
  - 3) Has already completed (or will complete in the next 3 months) MAGI training.

**NOTE** - The LD team may determine the need to remove a sitting elected leader from their current position based on demonstrated behaviors that are incongruent with the Methodist Book of Discipline and teachings of Christ.

**Effective LD Definition:** The work of a servant leader is to open a way for God to work through you and the resources available to you in a particular ministry area. As a steward of the mysteries of God (see 1 Corinthians 4:1), a servant leader is entrusted with the precious and vital task of managing and using God’s gifts in the ongoing work of transformation for you are about transforming the world into the kingdom of God.

## Leadership Development Success Criteria:

The success / performance metrics and guidance provided in this section are aspirational and may be redefined as needed to address changing congregational needs and priorities.

### **Elected Leadership (EL) Staffing Levels:**

- 1) **Goal** – 100% of all EL positions are filled at the start of a current service year (February) and maintained at 100% through-out the current service year.
- 2) **Acceptable Operating Level** – 95% or higher of all EL positions are filled for current service year.
- 3) **Action Required** - 94% or lower of all EL positions are not filled and the LD team is required to take steps to fill open EL positions to meet the 95% threshold.
- 4) **Action Required** – If any committee member misses three meetings in a row, the Servant Leader is to reach out & contact to determine ongoing service commitment to the committee ministry.
- 5) **Action Required** – New leader orientation plan is completed for new leaders by March. Leadership support discussions are held semiannually with each Servant Leader and Vice Servant Leader. Semiannually, the Leadership Development Team reviews their internal efforts to support and develop each leader.

### **Succession Plans:**

- 1) Any needed succession plan(s) to replace an elected servant leader position (Chair or Vice-Chair) rolling off at the end of their current service year are identified by April 1 of the current service year.
- 2) Candidates for targeted succession plans for leaders rolling off at the end of the current service year are identified and confirmed no later than August 1 of the current service year.
- 3) Succession plan training and execution to start no later than September 1 of the current service year.

4) Per the Methodist Book of Discipline, the Trustee committee elects its own Chairperson in the first meeting of the new service year. As such, Trustees will not follow the same schedule for succession planning and subsequent knowledge transfer / training for the Trustee servant leader (Chair) role.

#### **Leadership Connection:**

- 1) The LD team is responsible for organizing and leading each year's MUMC Leadership Connection Conference.
- 2) The Leadership Connection Conference serves as the start of the new elected leader service year and should be conducted no later than the first Saturday in February of the new calendar year.
- 3) The LD team will partner with MUMC clergy and staff to determine the Leadership Connection date, agenda, guest speakers, and any supporting content & materials.

#### **Leadership Development Process Manager:**

The senior pastor may elect to appoint a Leadership Development "Process Manager" from within the Leadership Development Team (or outside the Team) to support execution of the LD process throughout the current service year. The Process Manager will be a member of the LDT.

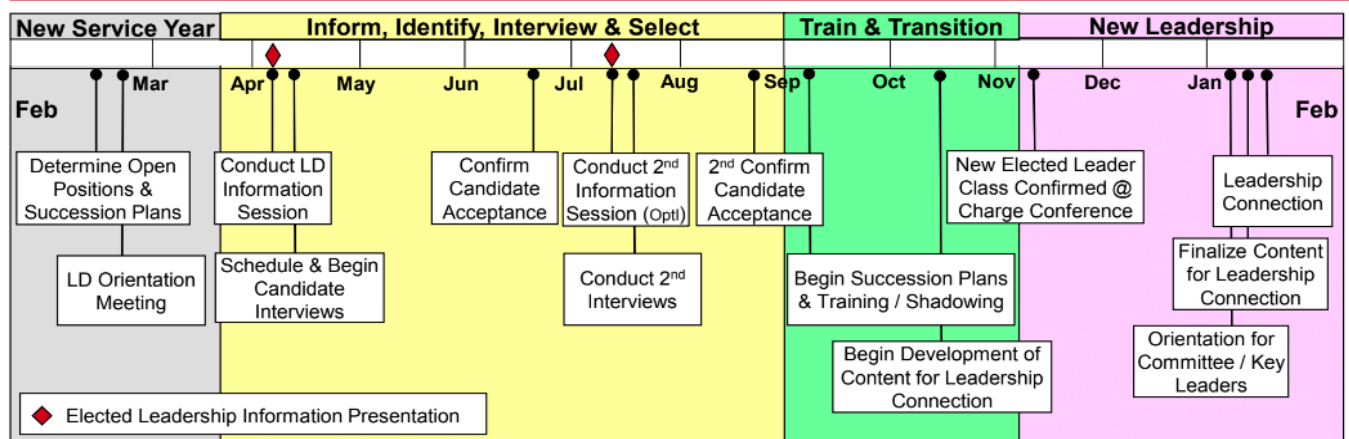
- 1) The "Process Manager" position would be responsible for leading execution of the LD Process in the current service year as defined in the LD Process Timeline document (See LD Process Timeline) to ensure LD staffing level goals are maintained throughout the service year.
- 2) The Process Manager would also be responsible for ensuring execution of Succession Plans and training as defined within each leadership committee (i.e. Admin Council, Finance, Global Impact, SPRC, Endowment and Trustees). Process Manager should check in with committee heads in January and again in October. The January conversation would be to ensure that committee orientation and knowledge transfer is taking place with new members. The October conversation would focus on succession plans and shadowing. The Process Manager would then update the Leadership Development Team.

#### **Other Leadership Development Team Responsibilities:**

- 1) Special Projects & Requests – The Leadership Development team is accountable for responding to any special requests or projects at the discretion of the senior pastor.
- 2) Communication – The LD team may also be asked to provide status updates on staffing of open elected leadership positions to the Admin Council or other MUMC bodies as appropriate.

# ELECTED LEADERSHIP PROCESS TIMELINE

## MUMC – Elected Leadership Process Timeline



- The Elected Leadership Process (ELP) begins each calendar year in **February** after the graduation of the previous leadership class. Seating and orientation of the new elected leader class is part of the annual Leadership Connection event in January.
- The ELP's purpose is to identify, qualify and select members from our congregation to serve in elected leadership positions in the Church and sponsor the annual Leadership Connection event.
- The Leadership Develop Team (LDT) is a standing ministry in the church and is chaired by the senior pastor. Serving on the LDT is by invitation of the senior pastor.
- The LDT follows a structured meeting schedule as needed throughout the year to conduct MUMC business including but not limited to:
  - Review current year roll-off schedule and identify the succession plan for ministry chair positions.
  - Review other open elected leadership positions to identify and qualify potential new candidates for elected leadership.
  - Review unplanned resignations and prioritize openings to be filled.
  - Planning and conducting Elected Leadership information sessions in support of the ELP.
  - Planning and leading the annual Leadership Connection event for new and current church leadership.
- Other activities that arise are typically unplanned and are addressed by the LDT on an "as needed" basis

Matthews United Methodist Church – Elected Leadership Process Timeline

1

## Leadership Development Team – Key Activity by Month

### February / March LDT Meeting: February & March

- **(F)** LDT – Welcome and orientation for new LD team members.
- **(F/M)** Determine open positions & succession plans.
- **(F/M)** Promo for serving in elected leadership in all communications:

#### Interested in Serving in Elected Leadership at Matthews UMC?

Our Leadership Development Team is beginning their work of identifying church members to serve on our elected leadership teams beginning in February. These teams include Administrative Council, Finance, Trustees, Staff-Parish Relations, Endowment, Global Impact and Leadership Development Teams. If you are interested & would like to find out more information, please contact Pastor Chuck at [chuck@matthewsumc.org](mailto:chuck@matthewsumc.org).

- **(M)** Current leaders & congregation are asked for recommendations for elected leadership using the LDT Recommendation Form. Members may also recommend themselves.
- **(M)** All recommendations are pre-screened to ensure they meet MUMC qualifications for elected leadership and those names are added to the LDT candidate tracking spreadsheet. The 2<sup>nd</sup> tab on the spreadsheet reflects the current officer list and shows which elected leadership positions need to be filled.

#### **April LDT Meeting: April**

- Conduct LDT Information Session
- Send “first letter” and descriptions of elected leadership positions to individuals who pass qualification screen.
- Two-person interview teams (from the LDT) are assigned a list of candidates to contact after receipt of the “first letter” to see if they’d like to continue in the process, and if so, schedule an interview to discuss the following:
  - Spiritual gifts, passions, and areas of interest / best fit are discussed with candidate.
  - Requirements for serving in an elected leadership position are reviewed (i.e. attendance, giving, MAGI) as well as regular attendance and active participation in the specific committee they might serve on.

#### **May LDT Meeting: May**

- Candidate feedback & interview notes are sent to Beth (beth@matthewsumc.org) to update the candidate tracking spreadsheet which is emailed to the LDT on a regular basis.

#### **June LDT Meeting: June**

- After all conversations have taken place, the LDT reviews the candidates and then recommends candidates to fill the open position(s) accordingly, based on qualifications, gifts, passions, and interests discussed in the candidate interviews.
  - The LDT interview teams contact the “selectees” to let them know what position they are being recommended for and to confirm their willingness to serve in the specific elected leadership position.
  - Confirm Candidate Acceptance - Feedback is given to Beth to record acceptance of the position on the candidate tracking spreadsheet.

#### **July No LDT Meeting**

- Conversations continue with recommended candidates as needed. Goal is to have completed these conversations by the August meeting.
  - Conduct 2<sup>nd</sup> Information Session (optional / if needed).
  - Conduct 2<sup>nd</sup> round of candidate interviews (if needed) and 2<sup>nd</sup> Confirm Candidate Acceptance discussions.

#### **August LDT Meeting: August**

- Complete next service year’s elected leader / officer nominations for presentation at Charge Conference in November for final confirmation.

#### **September LDT Meeting: September**

- Begin executing Succession Plans and Training & Shadowing activities for targeted elected leaders. Additional detail of these plans, training & shadowing activities to be defined by the LDT.

#### **October LDT Meeting: October**

- LD team begins working with clergy and staff to develop content for the next Leadership Connection in January.

#### **November LDT Meeting: November**

After nominated leaders are officially elected / confirmed at Charge Conference (usually held in November), they are sent a letter confirming their placement. Letters are also sent to those candidates not placed informing them that their name will be carried over into next year’s candidate pool if they so desire.

- LDT continues planning and content development for the January Leadership Connection.

#### **December No LDT Meeting**

- Senior Pastor sends letter to Key Leaders (committee chairs) in late December outlining duties for the leadership transition in February and reaching out to welcome new elected leaders, etc.
- LDT continues content development and work on Leadership Connection email lists and congregational promotion.

## January    **LDT Meeting: January**        **Leadership Connection: January**

- LDT, Clergy and Staff finalize content for Leadership Connection.
- Pastor includes in his Just These Lines gratitude for outgoing leaders & welcome to new leaders. New leadership list is shared in church email.
- Elected Leader lists/rosters, meeting schedules, etc. are updated on the website and in Realm at the end of January to be ready for the new service year beginning February 1st.
- New Service Year orientation meeting for Committee & Key leaders - **January - TBD**

## ELECTED LEADERSHIP ROLES & RESPONSIBILITIES

### Our Rule of Life

One ancient practice used by communities of Christians for almost 2000 years is called a Rule of Life. The meaning of the word “rule” comes from the Greek word for “trellis.” A trellis is a tool designed to enable a grapevine to get off the ground and grow upward, becoming more fruitful and productive. In the same way, a Rule of Life can be the trellis that helps us abide in Christ and become more spiritually fruitful.

What follows are seven time-tested, biblically-grounded spiritual practices for leaders:

1. I will practice a **persistent pattern of prayer**. My relationship with God in prayer is at the center of everything I say and do.
2. I will maintain a daily practice of **study and reflection with the Bible**. I am constantly looking for the way the Bible speaks to me.
3. I will use the **gifts God has given me to serve others** as my way of participating in God’s transformation of the world.
4. Because God loves people enough to give his Son for them, I will love people enough to **invite them to experience God’s love** and become disciples of Jesus.
5. I will live out my discipleship **with other disciples** who support me and hold me accountable for my continued growth.
6. I will **worship weekly** in the gathered congregation of followers of Jesus. It takes priority on my calendar. It sets my direction for the rest of the week.
7. I will **practice the biblical discipline of tithing**, giving the first 10% of my income to God’s work as the starting point of my life of generosity.

These seven spiritual practices, this Rule of Life, places us in a position of spiritual growth and transformation. Becoming a fully devoted follower of Jesus does not happen without these spiritual practices. Each of the elected leadership positions and ministry areas are grounded in these seven spiritual practices.

### Attributes for Service

The Leadership Development Community looks for the following attributes when assessing an individual’s readiness for service in a leadership position with MUMC:

1. **MUMC Leaders are deeply devoted to Jesus Christ.** A faithful/fruitful leader is committed to a transforming relationship with Jesus Christ and to making God’s love real to as many people as possible.
2. **MUMC Leaders seek deep interior lives.** All faithful/fruitful leaders will point to the time they spend in being attentive to the spiritual life. “Time with God” is not an optional appointment. Silence and solitude are at the heart of the spiritual life.
3. **MUMC Leaders bring their history with them.** A rough childhood, a failed business, a wholesome friendship – faithful/fruitful leaders are filled with them. As with the saints of generations past, leaders channel their life experience into an architecture that God can use for good.

4. **MUMC Leaders are more concerned with making a difference than with themselves.** A faithful/fruitful leader is often self-deprecating and enjoys laughter. They don't crave the spotlight and they do good deeds when no one is around.
5. **MUMC Leaders crave a lasting legacy that is beyond themselves.** Faithful/fruitful leaders are honest about their own mortality and think beyond themselves. They build for a day when they won't be around.
6. **MUMC Leaders are discerning.** A faithful/fruitful leader lays aside her personal agenda and recognizes that knowing and doing God's will is the highest value.
7. **MUMC leaders are visionary.** A faithful/fruitful leader has the capacity to see the larger picture of the present and future ministry of MUMC.
8. **MUMC leaders recognize they are part of a community.** They know how to listen to others and to be gentle, responsive and conciliatory. They are accountable.
9. **MUMC leaders demonstrate a positive, upbeat, hopeful attitude.** But they are no Pollyanna. They are grounded in reality, but they have memorized the words of Max DePree: "The first responsibility of every leader is to define reality. The last is to say thank you. And in between the leader is to serve."
10. **MUMC leaders ask God to show us the truth of our sin and how we might become agents of God's justice, mercy, love and re-creation.** Leaders ask questions, listen to and respect diverse voices and learn how and where racism (and other forms of injustice) shows in our community and how others are harmed by its effects.

# ROLES AND RESPONSIBILITIES

## Administrative Council Servant Leader

The Administrative Council Servant Leader is one of the more important roles among the servant leaders in elected leadership. The Admin Servant Leader serves as the “Conscience” of the church while facilitating the business of the church. Working in conjunction with the Lay Leader, other ministry heads and the clergy to address the most difficult risks and issues the church faces. Always considering all points of view and weighing both the short-term benefits and long-term impacts of an issue to determine what is the best decision or course of action to follow ensuring the viability of the church and vitality of the congregation.

### Responsibilities:

- Functions as the primary advocate for and representative of the church to the clergy and staff.
- Works with the pastor(s), the Lay Leader and other ministry heads to define and fulfill the mission and vision of the church.
- Meets regularly with the pastor(s) and church leaders to discuss the state of the church and to ensure that church ministries support the church’s mission.
- Determines the agenda and facilitates/ leads the Administrative Council meeting.
- Determines the agenda and facilitates/ leads the Key Leaders meeting.
- Attends other ministry meetings (i.e. Endowment, Finance, Trustees) to provide support and guidance on issues as needed.
- Engages personally in spiritual practices that build a relationship of attentiveness to God’s will and direction.

### Helpful skills and/or experiences:

- Has previously served effectively and faithfully in other servant leadership capacities within the church.
- An effective communicator and listener with excellent written and verbal skills.
- Analytical in nature; collecting all available data and points of view to consider in reaching decisions.
- Has the ability to keep an open mind to other view points and discern God’s will when addressing the business of the church.

### Meetings:

- Serves on the Administrative Council (as Servant Leader), Finance, Endowment, and Key Leaders.
- Meets with Senior Pastor, Executive Pastor & Lay Leader each month (dates set at beginning of each year).
- Serves on various teams or task forces as needed.
- Annual Leadership Connection, meets the end of January on a Saturday, 9:00 am-12:00 pm
- Administrative Council meets quarterly, the 4th Monday of February, May, August and November at 7:00 pm, except July & December.
- Annual Charge Conference meets in November.
- Finance Team meets on the 3rd Monday of each month at 7:00 pm, except July & December.
- Key Leaders meet the 4th Monday of each month at 5:30 pm, except July & December
- Endowment meets the 3rd Wednesday of each month at 6:30 pm, except July & December.

## Lay Leader

The Lay Leader’s responsibilities touch the entire breadth of the congregation’s life. The primary task of the Lay Leader is to connect the people of the church, the leadership of the church, and the local community.

### Responsibilities:

- Functions as the primary advocate for and representative of the laity in the local church, as well as for the community
- Works with the pastor(s) to fulfill the mission and vision of the congregation and works to strengthen the relationship between the pastor(s) and congregation
- Connects the congregation with the community and the world
- Meets regularly with the pastor(s) and church leaders to discuss the state of the church and to ensure that church ministries support the church’s mission



- Collaborates with other church leaders to envision, support and celebrate ministries of laity within and beyond the local congregation
- Represents the laity on various church leadership committees, including those listed below
- Engages personally in spiritual practices that build a relationship of attentiveness to God's will and direction.
- Plans and implements the semi-annual All Church meeting.

**Helpful skills and/or experiences:**

- An effective communicator and listener
- Has served effectively and faithfully in servant leadership capacities within the church
- Has the ability to keep a broad view of the separate parts of the church

**Meetings:**

- Serves as a member of the Annual Conference, Charge Conference, Administrative Council, Finance Team, Leadership Development Team, Staff Parish Relations Team and Key Leaders Team
- Meets with pastor(s) regularly
- Serves on various teams or task forces as needed
- Annual Leadership Connection, meets the end of January on a Saturday, 9:00 am-12:00 pm
- Semi-annual All Church meeting, the 4th Monday of April and October at 7:00 pm
- Annual Conference meets in June
- Administrative Council meets quarterly, the 4th Monday of February, May, August and November at 7:00 pm, except July & December.
- Annual Charge Conference meets in November.
- Finance Team meets on the 3rd Monday of each month at 7:00 pm, except July & December.
- Staff Parish Relations Team meets on the 1st Monday of each month at 7:00 pm, except July & December
- Key Leaders meet the 4th Monday of each month at 5:30 pm, except July & December
- Lay Leadership Development Team typically meets the 3rd Tuesday of each month at 7:00 pm, except July & December

## Administrative Council Member

Members of the Administrative Council are part of the primary decision-making, evaluating and forward-looking body of the church. The Administrative Council is made up of representatives from every area of ministry within the church as well as "at-large" congregational representatives.

**Responsibilities:**

- Be accountable to and serve as the executive agency of the charge conference, overseeing the administration and organization for the mission and ministry of the congregation.
- Provide for effective pastoral and lay leadership for the mission and ministry of the congregation.
- Provide for financial support, physical facilities and the legal obligations of the congregation and to recommend to the charge conference the compensation, housing needs and benefits for pastors and other paid staff.
- Provide for the connectional responsibilities of the congregation; to see that the congregation's relations to appropriate annual conference and district programs and structures are maintained.
- Constantly monitor the current reality of the congregation: that is, have a continuous awareness of the concerns, hopes and needs of the community (including the congregation) and an understanding of how the congregation may address those concerns and needs. This will involve knowing the demographic facts of both congregation and community and understanding the congregation's standing in the community. It will also be aware of areas where new congregations can be sponsored.
- See that the congregation (a) has shared vision that is clearly understood and supported by its members and (b) sets goals which are consistent with the mission of the church and that move the congregation toward its vision.
- See the congregation's involvement in ministries of nurture, outreach and witness – to the development of leadership and to the evaluation of the congregation's discipleship in these areas of ministry.
- Promote organizational learning in the congregation.
- Encourage and support an inclusive and ecumenical spirit within the congregation.

**Helpful Skills and/or Experience:**

- Have served effectively and faithfully in servant leadership capacity somewhere in the church.
- Have a good knowledge of the mission and ministry scope of the church, or be willing to learn.
- Have a desire to be part of the overall guiding body of the church and devoid of personal agenda

**Meetings:**

- The Administrative Council meets quarterly on the 4th Monday of select months at 7:00 pm: February, May, August and November.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting replaces the Ad Council meeting on the 4th Monday of April and October at 7:00 p.m.

## Finance Ministry Team Servant Leader

The Finance Chair has responsibility for leading the Finance Committee as well as leading the financial direction of the church. The Finance leader provides financial guidance to the church leaders including senior staff as well as to lay leaders of other committees.

**Responsibilities:**

- Lead the monthly Finance committee meeting
- Compile the annual budget
- Assure that monthly and annual financial statements are accurately stated according to GAAP (Generally Accepted Accounting Principles)
- Administer the funds received according to instructions from the church council
- Provide guidance to the church Finance staff by following directions established by the church council.
- Establish written financial policies to document internal controls
- Review the adequacy and effectiveness of internal control policies annually
- Make provisions for an annual audit of the financial statements of the church and all its organizations and accounts.
- Provide a report to the annual charge conference on the audit
- Recommend to the church council proper depositories for the church's funds
- Use contributions as donors intend
- Report to the church council annually on all designated funds that are separate from the operating budget.
- Assign committee members to assist in bank reconciliation tasks and represent Finance committee on Endowment committee

**Helpful skills and /or experiences:**

- An effective communicator
- Experienced leader at a higher level of finance and/or accounting
- Experience in church and/or non-profit accounting helpful

**Meetings:**

- Serves as a member of the Finance Committee (as Servant Leader), Administrative Council, and Key Leaders Team
- Finance Committee – leader
- Meet with pastor(s) regularly
- Member Key Leaders
- Member Administrative Council
- Member Annual Conference meeting
- Serves on various teams or task forces as needed

## Finance Ministry Team Member

The Finance Ministry Team identifies, perfects, and manages the finance system for the congregation so the mission and vision of the congregation can be achieved. The Finance Ministry Team works with the Church Treasurer to accomplish the following:

**Responsibilities:**

- Compile annually a complete operating budget for the church and submit it to the Administrative Council for review and adoption.
- Administer funds received according to approved policies and procedures.
- Provide a plan for the underwriting of the ministry of the church.
- Monitor the on-going finances of the church and submit changes or amendments to the budget to the Administrative Council as necessary.
- Prepare annually a report to the Administrative Council of all designated funds that are separate from the current expense budget.

- Provide for communications to and from the congregation regarding financial matters.
- Be accountable to the Charge Conference and to the Administrative Council.
- Make provision for an annual audit of the records of the financial officers of the church and all its organizations, and report to the Charge Conference.

**Helpful Skills and/or Experience:**

- Budgeting
- Financial background, not necessarily accounting
- Familiar with financial statements
- Financial procedure and policy development

**Meetings:**

- Finance Ministry team meets on the 3rd Monday of each month at 7:00 pm, except July & December.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.

## Staff Parish Relations Committee Servant Leader

The Servant Leader of the Staff Parish Relations Committee works in partnership with other congregational lay and staff leaders to discern God’s direction for our congregation. The Staff Parish Relations Committee focuses on maintaining a strong relationship between the staff and the congregation, and between the congregation and the District Superintendent.

**Staff Parish Relations Committee Servant Leader responsibilities:**

- To encourage, strengthen, nurture, support, and respect the pastor(s) and staff and their family(s).
- To promote unity in the church.
- To confer, counsel with the pastor/staff on matters pertaining to the effectiveness of ministry; relationships with the congregation; conditions that may impede the effectiveness of ministry; and to interpret the nature and function of the ministry.
- To confer with, consult, and counsel the pastor(s) and staff on matters pertaining to priorities in the use of gifts, skills, and time and priorities for the demands and effectiveness of the mission and ministry of the congregation.
- To provide annual evaluation for pastor/staff, identify continuing educational needs.
- To communicate and interpret to the congregation the nature and function of ministry in The United Methodist Church regarding open itinerancy (“without regard to race, ethnic origin, gender, color, disability, marital status, or age”), the preparation for ordained ministry, and the Ministerial Education Fund.
- To develop & approve written job descriptions and titles for associate pastors and other staff members in cooperation with the senior pastor.
- To consult with the pastor and staff concerning continuing education and spiritual renewal and arrange for necessary time and financial assistance.
- To enlist, interview, evaluate, review, and recommend annually to the charge conference lay preachers and persons for candidacy for ordained ministry.
- To interpret preparation for ordained ministry and the Ministerial Education Fund to the congregation.
- To confer with the pastor and/or other appointed members of the staff if it should become evident that the best interests of the charge and pastor(s) will be served by a change of pastor(s). The committee shall cooperate with the pastor(s), the District Superintendent, and the bishop in securing clergy leadership. Its relationship to the District Superintendent and the bishop shall be advisory only.
- To recommend, after consultation with pastor, other needed staff positions
- To recommend to church council written statement of policy and procedures regarding hiring, evaluation, promoting, retiring, and dismissing staff persons not subject to appointment
- To recommend adequate health and life insurance and severance pay for all lay employees, and pension benefits of at least 3% of compensation for lay employees who work at least 1,040 hours per year, at least 21 years old, and have one year service.
- To recommend, when staff is large and if desirable, a “personnel committee”
- To educate the congregation on value of diversity in clergy and lay staff
- To keep themselves informed of personnel matters in relationship to the Church’s policy, professional standards, liability issues, and civil law.
- To consult on matters pertaining to pulpit supply, proposals for compensation, travel expense, vacation, health and life insurance, pension, housing, and other practical matters affecting the work and families of the pastor and staff.

**Helpful skills and/or experiences:**

- An effective communicator and listener
- Has the ability to keep a broad view of the separate parts of the church
- Familiarity with the management of the organizational and personnel functions of a complex organization

**Meetings:**

- Serves as a member of the Staff Parish Relations Committee (as Servant Leader), Administrative Council, Finance Ministry Team, and Key Leaders Team
- Meets with pastor(s) regularly
- Serves on various teams or task forces as needed
- Annual Leadership Connection, meets the end of January on a Saturday, 9:00 am-12:00 pm
- Semi-annual All Church meeting, the 4th Monday of April and October at 7:00 pm
- Administrative Council meets quarterly, the 4th Monday of February, May, August and November at 7:00 pm, except July & December.
- Annual Charge Conference meets in November.
- Finance Team meets on the 3rd Monday of each month at 7:00 pm, except July & December.
- Staff Parish Relations Team meets on the 1st Monday of each month at 7:00 pm, except July & December
- Key Leaders meet the 4th Monday of each month at 5:30 pm, except July & December

## Staff-Parish Relations Committee Member

The Staff–Parish Relations Committee is the administrative unit which integrates the church staff and congregational interests to focus on the mission of the church.

**Responsibilities:**

- Relate to the entire staff, both appointed leadership and employed lay leadership through positive relationships and strong, effective avenues of communication.
- Fully understand the pastoral and staff duties that are being performed.
- Assess/evaluate staffing of ministry areas.
- Support lifelong learning (continuing education) for all staff.
- Evaluate and make recommendations for salary and benefits for all staff.
- Identify individuals from the congregation whom God seems to be calling for ordained ministry.

**Helpful Skills and/or Experience:**

- Human resource background.
- Management, training and development.

**Meetings:**

- Staff Parish meets regularly on the 1st Monday at 7:00 pm, except July and December.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.

## Trustees Ministry Team Servant Leader

The servant leader of the Trustees leads the Trustee committee, prepares and manages the meeting agenda, and sets the meeting schedule. The chairperson is assisted by a vice servant leader and secretary. The Trustees have the responsibility to oversee and take responsibility for the maintenance and upkeep of all physical church and all other properties and capital equipment owned by the church, including grounds and parking lots, vehicles, etc.

**Responsibilities:**

- Manages capital budgets established by the church
- Establishes processes for how groups or ministries can request capital funds
- Establishes longer-term planning for capital requirements (future investments in church infrastructure e.g. boiler, chiller, air-handler replacements, etc.)
- Manages the process for requesting use of church property
- Oversee success of the property and building maintenance programs
- Overseeing, property insurance and most project work related to the building/grounds (ex: repaving of the parking lot, playground improvements, memorial garden).

**Helpful Skills and/or Experience:**

- Organization skills
- Leadership skills
- Communication skills
- Accomplishment oriented
- Experience in facilities operations and/or budget management (capital and operating)

**Meetings:**

- Serves on the Trustees Team (as Servant Leader), Administrative Council, and Key Leaders
- The Trustees meet every 2nd Monday of the month at 7:00 pm, except July & December.
- The Trustee Servant Leader also attends Key Leaders and Administrative Council meetings.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.
- The Trustee committee is also asked to have a representative attend the monthly Finance committee meeting the Endowment committee meeting (this doesn't need to be the servant leader).

## Staff Parish Relations/Pastor Liaison

The role of the Pastor/SPRC Liaison is to build a relationship with the assigned pastor and to provide a connection between the Pastor and the Staff Parish Relations Committee (SPRC).

This role is not a supervisory role. The supervisor will handle all matters of performance and assessment. All issues with and between pastors, staff members and supervisors should be redirected to the appropriate supervisor. Proper protocols are listed in the Employee Handbook.

The term of the Pastor Liaison will be one year. New liaisons will be assigned each year.

The liaison will be the same gender as the pastor to whom they are assigned.

While this liaison role provides the pastor with a personal connection to the SPRC, it is not a reporting role. It is not the role of the liaison to report back to the SPRC regarding the pastor.

**Building a relationship with the pastor can be achieved in the following ways:**

- Pray regularly for the pastor.
- Attend worship regularly.
- Receive and read church communications. Stay informed on church issues and activities to be a resource and sounding board for the pastor. This can easily be done through the website, Just These Lines, Celebration Newsletter and MUMC News on Realm.
- Build familiarity and trust with the pastor.
- Learn about the pastor's current ministry and life circumstances. Ask about his/her background and family. What influences did he/she have in their lives? Share the same about yourself.
- Maintain confidentiality with the pastor.
- Become a champion, advocate, and source of encouragement for the pastor.
- Provide honest, thoughtful feedback for the pastor.
- Encourage the pastor to practice self-care, taking time for his or herself.

Meet with the pastor periodically. Perhaps every other month over coffee or a meal.

**Helpful skills and qualities:**

- Friendly and approachable
- Enjoys communicating with others
- Enthusiastic and desires to encourage others to the mission of the church
- A passion for life
- A servant's heart
- Excellent communication skills

## Trustees Ministry Team Member

The Trustees Ministry Team supervises and maintains all property belonging to the congregation so the ministries of the congregation can be effective.

### Responsibilities:

- Oversee, maintain and supervise all church property.
- Report annually to the Charge Conference on the state of the church's property, equipment, investments and resources.
- Responsible, in conjunction with the pastor, for all use of the church buildings and grounds.
- Maintain adequate insurance coverage on all church property and develop appropriate risk-management policies.
- Submit to the Finance Ministry Team annual budget requests for insurance, property maintenance and improvement and new property purchases.
- Be accountable to the Charge Conference and to the Administrative Council.

### Helpful Skills and/or Experience:

- Facility management and policy development.
- Architectural, engineering, landscaping experience.
- Knowledge of property insurance, legal background, construction work.

### Meetings:

- The Trustees meet every 2nd Monday of the month at 7:00 pm, except July & December.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.

## Leadership Development Team

The Leadership Development Team identifies and invites into servant leadership those persons uniquely gifted and passionate about serving in elected ministry positions.

### Responsibilities:

- Understand the mission and ministries of the church.
- Intentionally become familiar with as many persons in the congregation as possible.
- Know and understand the responsibilities and qualifications for each leadership position nominated and elected by the Charge Conference.
- Keep ministry position descriptions for elected positions up-to-date.
- Carries out the actions to implement identification, development and support elected leaders at MUMC.
- Invite persons to serve in leadership positions.
- Work with the Administrative Council and other groups to develop training plans for new and experienced leaders and workers, paying special attention to nurture and to developing leaders as spiritual leaders.

### Helpful Skills and/or Experience:

- Willingness to fully embrace MAGI and Leadership concepts and put into action through established process.
- Understanding of needs of individual ministry teams.
- Spiritual gifts of discernment, wisdom, shepherding.

### Meetings:

- By Discipline (The United Methodist Book of Discipline), the team is chaired by the Senior Pastor.
- The Leadership Development Team typically meets the 3rd Tuesday of the month at 7:00 pm, except July & December.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.

## Lay Delegate to Annual Conference

The Lay Delegates represent their home church at the Western North Carolina Annual Conference of the United Methodist Church.

**Responsibilities:**

- There is one Lay Delegate for every ordained minister in the church. MUMC currently has five Lay Delegates.
- Lay Delegates are expected to attend the Annual Conference in Lake Junaluska (generally summer, exact dates yet to be set) and participate in a Forum Group Committee.
- Lay Delegates vote on all matters that come before the conference, except Ordination. Some of these matters include the budget of the Annual Conference and delegates to the General Conference and the Jurisdictional Conference.

**Helpful Skills and/or Experience:**

- Availability to attend the conference.
- Broad overall knowledge of church mission and ministry (this is accomplished in part by attending Administrative Council meetings regularly).
- Prior service to standing ministry teams.

**Meetings:**

Lay Delegates are members of the Administrative Council and will attend monthly meetings.

- The Administrative Council meets quarterly on the 4th Monday of select months at 7:00 pm: February, May, August and November.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.

## Global Impact Team Servant Leader (Missions)

The Global Impact Team leader works with the Minister of Missions to cultivate the mission ministry of Matthews UMC outside the walls of the church. The Global Impact Team Leader works through and with the Global Impact Team to cultivate opportunities for the people of MUMC to give, serve, send and pray.

**Responsibilities:**

- Works closely with the Minister of Missions offering lay leadership to the Global Impact Team.
- Ensures that all local, regional, national and international missional partnerships are maintained in mutually healthy and beneficial ways.
- Oversees missional serving options striving to provide as many local, regional and international ones as possible so that the people of MUMC have the opportunity to serve.
- Ensures that the Global Impact team communicates the celebrations, opportunities and concerns of all Global Impact activity with the congregation.
- Oversees the faithful stewardship and distribution of the Global Impact designated fund as well as other mission related designated funds (i.e. Feed the People, Disaster Recovery and Response, etc..).
- Continues to grow in their comprehension of God's missional work in the world and in our partnership with God in mission.

**Skills/Experiences:**

- Communication in a meeting setting but also some Public Speaking for communication between members of the church and our missional partners.
- Organizational skill and time management will help to be successful.
- Oral and written communication skills.
- Ability to delegate is important.
- Creative and critical thinking for new views on existing processes and partners.

**Meetings:**

- Serves on the Global Impact Team (as Servant Leader), Administrative Council, Finance, and Key Leaders.
- Global Impact meeting currently falls on the second Monday of each month. No meeting in July.
- Attend Finance Meeting (3rd Monday), Key Leaders (4th Monday), Administrative Council (4th Monday), All Church Meetings (April and Oct.).
- Voting member of each meeting.

## Global Impact Team Member (Missions)

Members of the Global Impact Team are responsible for mission strategy, mission partnerships & provision of missional opportunities in and through Matthews UMC. This includes organization & communication of new and ongoing opportunities (locally, nationally, & internationally). This team is also responsible for the disbursement of the financial faith commitments received through the annual Global Impact Celebration.

### Meetings:

- The Global Impact Team meets the 2nd Monday of each month. No meeting in July.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meeting on the 4th Monday of April and October at 7:00 p.m.

## Endowment Ministry Team Servant Leader

Works with Senior Pastor and the Endowment Ministry Team to communicate the endowment program to all members of the congregation and to coordinate events and activities that connect congregants to the endowment program opportunities.

### Responsibilities:

- Lunch meetings with interested congregant families – target is one per month, actual is 8 – 10 per year. Along with Senior Pastor, shares the endowment program over lunch and explains the endowment program as estate planning option that we would like them to consider.
- Meets with committee members monthly through the year to plan communications strategies, engagement opportunities for the congregation, annual legacy dinner, and review performance of the endowment investments.
- Meets at least annually with representatives from the United Methodist Fund of WNCC to review performance of investments and understand trends in estate planning.
- Working with the Senior Pastor, provides agenda and planning structure for the committee's activities each year.
- Reviews the monthly reports from the UMFWNCC and tracks gifts from church office to investment in the appropriate endowment fund.
- Prepares annual report of the endowment program for review by committee and distribution to the church via website and direct mail.
- Develops tailored program opportunities as identified by donors (scholarships primarily), working with church personnel to determine criteria, selection process, funding and award amounts.
- Provide content or presentations for any group/meetings that might allow an opportunity to share the endowment program story.
- Work with church communications team and committee members to keep endowment website current and fresh, including video and written content.
- Developing recommendations for distribution of endowment earnings.
- Works with church staff to design work flow and management of endowment instructional documents and gifts.

### Helpful skills:

- Organizational and committee management skills.
- Communications skills, primarily in the good listening and relational area
- Financial Expertise, especially in the retirement or estate planning arena
- Foundation in Biblical stewardship practices and applications
- Ability to keep it simple. The attorneys and estate planners will handle the complicated issues.
- Process orientation. Ability to design operating processes that work within the limited church office resources.

### Meetings:

- Chairs the monthly meetings of the Endowment Ministry Team (usually 10 per year)
- Attends Administrative Council Meetings
- Attends annual leadership connection
- Attends annual charge conference
- Meets with Senior Pastor and church staff throughout the year to plan for events and to improve process design for endowment activity.
- Monthly lunches with interested families as scheduled



## Endowment Ministry Team Member

This committee is responsible for developing and implementing all aspects of the Matthews United Methodist Endowment Fund.

### **Responsibilities:**

- Policies and procedures related to communicating and managing the Endowment Fund.
- Develop and execution of communication and awareness plan to help congregation understand the benefits of the Endowment Fund.
- Identify opportunities for communication and engagement with potential participants
- Serve as a point of clarity for any congregant with questions about the Endowment Fund.

### **Meetings:**

- The team meets the 3rd Wednesday of each month at 6:30 pm, except July & December.
- Leadership Connection meets the end of January on a Saturday, 9:00-12:00.
- The All-Church Meetings on the 4th Monday of April and October at 7:00 p.m.

# APPENDIX

# MUMC STAFF LIST

## Staffing Model as of March 23, 2023

### SENIOR LEADERSHIP TEAM\*

Dr. Chuck Wilson	Pastor/FE-Elder in Full Connection – (directly oversees all programming ministries in blue)
Rev. Paul Craig	Executive Pastor/FE – Elder in Full Connection (directly oversees all programming ministries in green)

### REMAINING MANAGEMENT TEAM MEMBERS\*

#### Supervised by Lead Pastor:

Craig Estep	Director of Music & Worship Arts
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#### Supervised by Executive Pastor:

Rev. Roldan F. Norona	Assistant Pastor/FL – Full Time Local Pastor – Spanish-Speaking Ministry
Rev. Corey Milliet	FD – Deacon in Full Connection – Director of Age Level Ministries
Debbie Fitts	Treasurer, Executive Director of Operations (directly oversees all programming ministries in orange)

#### Supervised by Treasurer, Executive Director of Operations

Shannon Williams	Communications Director
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### AGE LEVEL MINISTRIES

Rev. Corey Milliet is direct supervisor

Alix Arndt	United Kids Associate (4 yrs.-3 <sup>rd</sup> grade) (40 hours-salaried)
Gwynn Aycock	United Kids Nursery Coordinator (15 hours)
Rob Hunter	Associate Director of Age-Level Ministries (40 hours-salaried)
Skye Humphries	United Kids & United Youth Associate (4 <sup>th</sup> – 9 <sup>th</sup> Grades) (40 hours-salaried)
Cassidy Hronowski	Age-Level Ministry Associate & Administrative Assistant (35 hours)
Kim Layton	United Adults Associate (40 hours-salaried)
Connor Johnson	United College-Age & Young Adult Associate (30 hours-salaried)
Jamie Conder	United Youth Administrative Assistant (35 hours)
Amy Benjamin	United Youth, College-Age, Young Adult Administrative Assistant (35 hours)
Briana McClendon	United Kids Administrative Assistant (35 hours)

### COMMUNICATIONS MINISTRY

Shannon Williams is direct supervisor

Marianne Bowman	Communications Assistant (25 hours per week)
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### DAILY BREAD MINISTRIES

CURRENTLY BEING OVERSEEN BY FACILITIES

### FACILITIES

Del Funderburk	Dir. of Facilities and Property Management (40 hours-salaried)
David Smith	Facility Staff - Maintenance (30 hours per week)
Richard Sanders	Facility Staff (40 hours per week)
Jamey Norton	Facility Staff (10 hours per week)
Robert Thomson	Facility Staff (15 hours per week)
David Aguilera	Facility Staff (15 hours per week)
Julia Thompson	Administrative Assistant (20 hours Facilities; 5 hours Realm; 5 hours Daily Bread Ministries)

#### GLOBAL IMPACT/MICAH CONNECTION

Amy DeVore Director of Missions & Justice Ministries (20 hours)

#### MUSIC AND WORSHIP ARTS

Craig Estep is direct supervisor

Abigail Okland Director of Children and Youth Music; Admin. Asst. to Craig Estep (35 hours)  
Kathy White Music Ministry Associate – Organist (35 hours)  
Joel Mullis Worship Production Director (40 hours-salaried)  
Susan Chambers Volunteer Worship Coordinator  
John Woodall Director of Contemporary Worship/Assist w/Production & Youth Praise Team (40 hours-salaried)

#### OPERATIONS

Beth Lynn Executive Assistant to Pastor Chuck/Office Manager (35 hours)  
Teresa Clark Executive Assistant to Pastor Paul (35 hours)  
Leigh Ann Fesmire Accounts Receivable Coordinator (35 hours)  
Rona Swakopf Accounts Payable Coordinator (20 hours)  
Ashley Broome Administrative Assistant (5 hours) and Membership Secretary/Realm (25 hours)  
Liz Tikalsky Receptionist/Admin Asst for Amy DeVore (Global Impact) and Jenny Savage (Welcome & Hospitality) (40 hours)

#### SELF-SUSTAINING MINISTRIES

Camille Gotta Recreation Coordinator – (5 hours/week paid from recreation fees)

#### SPANISH-SPEAKING MINISTRY

Rev. Roldan Norona is direct supervisor

Herminia Gamoneda Administrative Assistant (15 hours)

#### WELCOME-HOSPITALITY

Rev. Jenny Savage Assistant Pastor/Coordinator of Welcome & Hospitality (15 hours)

\*Note: All Management Team Members are salaried.

# LEADERSHIP RECOMMENDATION FORM

Please use this form to make recommendations for elected servant leaders. Return to Beth Lynn at Church Office or by email: [beth@matthewsumc.org](mailto:beth@matthewsumc.org).

Elected leader committees include: Administrative Council, Trustees, Staff Parish, Finance, Global Impact Team, Endowment Team, Leadership Development Team, & Lay Delegates to Annual Conference.

## Attributes for Service

The Leadership Development Community looks for the following attributes when assessing an individual's readiness for service in a leadership position with MUMC:

1. **MUMC Leaders are deeply devoted to Jesus Christ.** A faithful/fruitful leader is committed to a transforming relationship with Jesus Christ and to making God's love real to as many people as possible.
2. **MUMC Leaders seek deep interior lives.** All faithful/fruitful leaders will point to the time they spend in being attentive to the spiritual life. "Time with God" is not an optional appointment. Silence and solitude are at the heart of the spiritual life.
3. **MUMC Leaders bring their history with them.** A rough childhood, a failed business, a wholesome friendship – faithful/fruitful leaders are filled with them. As with the saints of generations past, leaders channel their life experience into an architecture that God can use for good.
4. **MUMC Leaders are more concerned with making a difference than with themselves.** A faithful/fruitful leader is often self-deprecating and enjoys laughter. They don't crave the spotlight and they do good deeds when no one is around.
5. **MUMC Leaders crave a lasting legacy that is beyond themselves.** Faithful/fruitful leaders are honest about their own mortality and think beyond themselves. They build for a day when they won't be around.
6. **MUMC Leaders are discerning.** A faithful/fruitful leader lays aside her personal agenda and recognizes that knowing and doing God's will is the highest value.
7. **MUMC leaders are visionary.** A faithful/fruitful leader has the capacity to see the larger picture of the present and future ministry of MUMC.
8. **MUMC leaders recognize they are part of a community.** They know how to listen to others and to be gentle, responsive and conciliatory. They are accountable.
9. **MUMC leaders demonstrate a positive, upbeat, hopeful attitude.** But they are no Pollyannas. They are grounded in reality, but they have memorized the words of Max DePree: "The first responsibility of every leader is to define reality. The last is to say thank you. And in between the leader is to serve."
10. **MUMC leaders ask God to show us the truth of our sin and how we might become agents of God's justice, mercy, love and re-creation.** Leaders ask questions, listen to and respect diverse voices and learn how and where racism (and other forms of injustice) shows in our community and how others are harmed by its effects.

## Recommendations:

Name: \_\_\_\_\_ Recommend for: \_\_\_\_\_

Qualifications: \_\_\_\_\_

Name: \_\_\_\_\_ Recommend for: \_\_\_\_\_

Qualifications: \_\_\_\_\_

Person making recommendation (required): \_\_\_\_\_

# FIRST LETTER TO CANDIDATE

This letter is mailed prior to calling a candidate, along with a copy of the Elected Leadership Descriptions document.

*(MUMC letterhead)*

*Date*

*Name*

*Address*

*Address*

Dear \_\_\_\_\_,

The Leadership Development Team would like to discuss the possibility of you serving in elected leadership at Matthews United Methodist beginning in February. You were either recommended by one of your peers in our congregation or expressed interest yourself. Either way, it is an honor to serve, and the Leadership Development Team believes you would be an asset to one of our formal elected teams.

You will be contacted in the near future by a member of our Leadership Development Team to continue the process and have conversation about the open positions. If you would prefer not to be considered, please just let the team member know when they contact you.

I have enclosed descriptions of the elected leadership positions available to help you decide if you would like to pursue this opportunity. As you reflect on your areas of interest and availability to serve, you will want to think about the qualifications for serving as a leader in the church:

- Must be a member of MUMC for a least one year
- Evidence of supporting the church through **prayers**, **presence** (regular worship attendance), **gifts** (regular pattern of giving to God through the ministries of MUMC), and **service** (faithfully serving in an ongoing ministry), and **witness**.
- Completion of the MAGI Spiritual Gifts Workshop is required, if you have not already done so. The dates are available on the church website under the Teach tab.
- Teachable spirit (still willing to learn new things) and a willing servant's heart
- Solid, growing relationship with God, through devotion time and continuing Bible study

Thank you for your serious consideration of this opportunity to serve your church. I pray that God will speak powerfully to you in your discernment process as you consider serving the church in such a sacred and meaningful capacity.

Blessings,

Dr. Charles (Chuck) W. Wilson, II

# SAMPLE QUESTIONS FOR CONVERSATION WITH CANDIDATES

## Opening:

We thank you for participating in our process for helping us to identify leaders within our church.

Our goal is to create a pool of leaders which can be called to serve over the next several years. We have a select number of spots for elected leadership, so not all people will be elected to serve, yet we want to:

- Assist in educating you to the areas of leadership & finding the best fit for you – elected leadership *and* volunteer opportunities within all ministries.
- Identify your interests, passions, and skill set to find a good fit for you to plug in.

## Background:

- How long have you been a member of MUMC?
- Do you have children, family in the area?
- Did you attend another church prior to MUMC? Activities?
- What type of work (occupation) do you do?
- What are your strengths at work that might help us identify a good fit for you here at the church?
- Hobbies and interests?

## Current Activities & Experience:

- What groups and activities do you presently participate in at MUMC?
- Do you participate in mission trips or other ministries?
- Where do you see your gifts being utilized in the church setting?
- Do you have a preference of committee when reviewing the elected leadership opportunities? (They should have a copy of the *Elected Leadership Descriptions* document.)

Administrative Council, Lay Delegate to Annual Conference (serves on Ad Council), Finance, Trustees, Staff Parish, Leadership Development, Endowment Team, Global Impact Team

## Spiritual Journey/ Maturity:

- Are you part of a Sunday school or a bible study group?
- Are you participating regularly in worship?
- Have you taken MAGI to learn your spiritual gifts? If so, what are they?
- We ask our leaders to support MUMC through their **prayers**, **presence** (regular worship attendance), **gifts** (regular pattern of giving to God through the ministries of MUMC), and **service** (faithfully serving in an ongoing ministry), and **witness**.
- Do you support the MUMC Mission Statement?:  
As members of MUMC and members of the universal Body of Christ, we are committed to REACH others for Christ, to TEACH people (including ourselves) to mature as fully devoted Disciples of Christ, to PRAISE God through worship and in everything we do, and to SERVE God and neighbor to relieve suffering in the world.

## In Closing:

Thank you for taking the elected leadership at MUMC seriously. We are identifying church members interested in leadership, and looking at the spaces we have available in elected committees. If interested, we will be in touch in the coming months. In the meantime, as I'm sure you know, there are many opportunities to serve throughout all the ministries of our church.

# CANDIDATE CONVERSATION FORM

**Comments, Observations & Recommendation: Return to Beth Lynn**

**Candidate:** \_\_\_\_\_

**Met with (LDT members):** \_\_\_\_\_

**Date:** \_\_\_\_\_

**BACKGROUND:**

**EXPERIENCE, ACTIVITIES, INTERESTS & PASSIONS:**

**SPIRITUAL JOURNEY:**

**OBSERVATION & RECOMMENDATIONS:**



# LETTER TO KEY LEADERS

*Sent end of December/First of January*

Dear \_\_\_\_:

2022 lies behind us and 2023 is now ahead of us. Who could have imagined all we have faced ... and now, all that is ahead. Dr. Luke in Acts 2:26 quotes David, *"I saw God before me for all time. Nothing can shake me; he's right by my side. I'm glad from the inside out, ecstatic; I've pitched my tent in the land of hope."* This is my prayer for the days ahead, as it has been my prayer during all our challenges of the last few years. We have and will continue to plant our tent in the land of hope, and we will do this together.

I know you are already preparing for a new leadership year beginning on February. A few things might helpful during the transition month of January:

1. **Prayerfully consider the year ahead.** Seek God's direction for your work. Listen closely to how God might be nudging your heart.
2. **Reach out to all your committee/community members who are rotating off.** Some of you have already done so. Thank you. Celebrate with them the work of your committee for the past year, even in the midst of the most trying of circumstances. I will be sending a special gift of gratitude from the church to all persons who have completed their term of faithful service.
3. **Reach out to your new committee members.** They will be anxious about their service. A phone call from you will make a huge difference. Help them to prepare for virtual meetings. Also, please consider reaching out to them each month for the first few months (through May) to clarify issues, asking about their questions, and to make sure they know their voices matter.
4. **Take full advantage of our Realm platform.** We've included a step-by-step process to help you in sending notes, keeping files, etc.
5. **Consider anything from "Our Next Faithful Steps" plan** that might fall in your area. Determine how you might be able to carry out these hopes, dreams and wishes of our congregation.
6. **Make sure all your committee members (new and old) know of the Leadership Connection .** Of course, we (the church office) will be communicating to them about this important leadership development time as well. As we approach the date, we will provide all with a link.
7. **At 12:30 pm that day (January 30), we will have a virtual Administrative Council meeting to finalize our 202\_ church budget.**
8. Beth Lynn will be in touch with you about a time for the two of us to have a virtual meeting before the end of the January. I look forward to this personal time of checking in with you.
9. **Key Leader Training in January**

Thank you again for taking the mantle of leadership. Our church would be infinitely less without you.

New Year hope,

Dr. Charles (Chuck) W. Wilson II

[Chuck@MatthewsUMC.org](mailto:Chuck@MatthewsUMC.org)

# CHURCH LEADERSHIP COVENANT

The covenant that follows offers us goals that are in keeping with the values and teaching of our faith. They give us a way to talk about the behavior and practices we adopt in our work together as leaders who wrestle with change and with differences.

These covenantal behaviors are offered to leaders not as constraining prohibitions, but as spiritual habits for our leadership community.

## **Our Covenant with God ...**

*We covenant to pray, alone and together, to thank God and to ask for God's help in our lives and in our work for our church, and we covenant to listen to God's answer to us.*

## **Our Covenant with our Matthews United Methodist Church Family ...**

*We covenant to demonstrate our leadership and commitment to our church by our positive example.*

*We covenant to faithfully worship with the community of faith called Matthews United Methodist Church.*

*We covenant to embrace tithing and generosity in our living and giving.*

*We covenant to support our church's pastors and staff so that their efforts can be most fruitful.*

*And we covenant to try to discover what is best for our church as a whole.*

## **Our Covenant with Each Other as Spiritual Leaders ...**

*We covenant to respect, care, and pray for each other.*

*We covenant to treat our time as an opportunity to make an important gift to our church.*

*We covenant to listen with an open, non-judgmental mind to the words and ideas of others in our church.*

*We covenant to discuss, debate, and civilly disagree openly in meetings, expressing ourselves as clearly and honestly as possible, so we are certain that our point of view is understood.*

*And we covenant to support the final decision of the Council, team or committee, whether or not it reflects our view or opinion.*

# LEADERSHIP SUPPORT DISCUSSION CHECKLIST

Ongoing support discussions are an opportunity to lift up who/what is doing good work and to provide support where improvements can be made. Don't wait until things are going badly to make changes. Be proactive in the work and assessment of progress of both your committee and the various ministries and leadership over which you have responsibility. Consider scheduling time for formal evaluation of your committee's progress toward goals at least quarterly.

## **Here are the basic steps of that approach:**

- What is going well? Appreciate and value the work that has been done.
- What might be? Envision how it could be even better.
- What should be? Talk about what is important—essentials.
- What will be? Discuss innovative ideas about ways to work in the future and changes that you need to make.

## **Here are some other evaluative questions you might ask. Your responses will help you plan future committee efforts to identify, develop, deploy, evaluate, and monitor leaders.**

- Are those recruited for leadership positions practicing servant leadership principles?
- Are the missions or ministries they are leading effective? (How do we define effective?)
- Has the committee followed through with support and training?
- Are the resources used appropriate? If not, what changes are needed?
- What challenges have you experienced?
- How can your committee function be improved? Are there processes that need to be redesigned or improved?
- Are the committee members following their commitments to spiritual disciplines and confidentiality? If not, how can they improve?

## **Ongoing Assessment for Improvement.**

Check the progress of your work regularly, and avoid making it a once-a-year assessment. Increasingly, congregations and work groups end every meeting with three questions:

- What has gone well?
- What have we learned?
- What can we do better next time?

# NEW LEADER ORIENTATION

Leader: \_\_\_\_\_

Role: \_\_\_\_\_

LDT member: \_\_\_\_\_

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

## **An Orientation Packet**

Prepare an orientation packet for new and continuing leaders. The packet might include:

- The mission of the church and the statement of ministry goals for the year.
- The policies and procedures of the church and of the particular position role & responsibilities.
- A description of the ministry responsibilities.
- A calendar of church events for the year.
- A MUMC organizational chart including names of staff.
- The times and dates of meetings and events—including training events.
- Resource materials and appropriate guidelines.
- Budget information for the church and for that area of ministry.
- The process used to report the work of the committee to others.
- A review of the church organization chart and how they work together.

## ADDITIONAL RESOURCES FOR LEADERS

### **Website Resources:**

Appreciative Inquiry tools and process information (<https://appreciativeinquiry.case.edu/>).

Discipleship Ministries (<http://www.umcdiscipleship.org>) has a training module for the committee on nominations and leadership development and for leadership development of administrative leaders (trustees, finance, church council, lay leader, staff/pastor-parish committee, etc.). There are sample job descriptions, devotional materials for church committees, and practical tools for church leaders.

Ministry Matters™ is a community of resources for church leaders™ in congregations of all sizes. New articles and resources are added weekly. You can sign up for a weekly email. <http://www.ministrymatters.com>.

The Lewis Center for Church Leadership offers free and low-cost resources for church leaders (<http://www.churchleadership.com>).

The Faith and Leadership site has resources for church leaders. Resources of the former Alban Institute are incorporated in this site developed by the Leadership Institute at Duke Divinity School. Explore the “topics” tab at <http://www.faithandleadership.com>.

### **UMC Agencies & Helpful Links:**

General Board of Church and Society, [www.umc-gbcs.org](http://www.umc-gbcs.org), 202-488-5600; Service Center, 1-800-967-0880

General Board of Discipleship (d/b/a Discipleship Ministries), [www.umcdiscipleship.org](http://www.umcdiscipleship.org), 877-899-2780; Discipleship Resources, <http://bookstore.upperroom.org>, 1-800-972-0433; The Upper Room, [www.upperroom.org](http://www.upperroom.org), 1-800-972-0433; email: [info@umcdiscipleship.org](mailto:info@umcdiscipleship.org)

General Board of Global Ministries, [www.umcmmission.org](http://www.umcmmission.org), 1-800-862-4246 or 212-870-3600; email: [info@umcmmission.org](mailto:info@umcmmission.org)

General Board of Higher Education and Ministry, [www.gbhem.org](http://www.gbhem.org), 615-340-7400 General Board of Pension and Health Benefits, [www.gbophb.org](http://www.gbophb.org), 847-869-4550 General Commission on Archives and History, [www.gcah.org](http://www.gcah.org), 973-408-3189

General Commission on Religion & Race, [www.gcorr.org](http://www.gcorr.org), 202-547-2271; email: [info@gcorr.org](mailto:info@gcorr.org)

General Commission on the Status & Role of Women, [www.gcsrw.org](http://www.gcsrw.org), 1-800-523-8390 General Commission on United Methodist Men, [www.gcumm.org](http://www.gcumm.org), 615-340-7145 General Council on Finance and Administration, [www.gcfa.org](http://www.gcfa.org), 866-367-4232 or 615-329-3393

Office of Civic Youth-Serving Agencies/Scouting (General Commission on United Methodist Men), [www.gcumm.org](http://www.gcumm.org), 615-340-7145

The United Methodist Publishing House, [www.umph.org](http://www.umph.org), 615-749-6000; Curric-U-Phone, 1-800-251-8591; Cokesbury, [www.cokesbury.com](http://www.cokesbury.com), 1-800-672-1789

United Methodist Communications, [www.umcom.org](http://www.umcom.org), 615-742-5400; EcuFilm, 1-888-346-3862; InfoServ, email: [infoserv@umcom.org](mailto:infoserv@umcom.org); Interpreter Magazine, [www.interpretermagazine.org](http://www.interpretermagazine.org), 615-742-5441

United Methodist Women, [www.unitedmethodistwomen.org](http://www.unitedmethodistwomen.org); 212-870-3900

## SOURCES FOR THIS DOCUMENT

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- Lay Leader Handbook
- Metro District (March 2017 Fourth Edition) Western NC Conference, The United Methodist Church, Guidebook Local Lay Leader
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