

ALABAMA - WEST FLORIDA CONFERENCE
UNITED METHODIST WOMEN
POLICIES *(revised JULY 2020)*
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ALABAMA WEST FLORIDA UNITED METHODIST WOMEN POLICIES

I. FINANCE

All monies collected from local unites and districts belong to the conference organization. These funds are to be disbursed by the conference according to the PURPOSE.

A. SYMPATHIES SENT IN THE NAME OF THE CONFERENCE

1. The district president shall send a "Gift in Memory" card to a member of the current Conference Executive Committee residing within her district in the event of the death of a parent, child, or husband, stating that a gift to mission has been sent to National United Methodist Women from the conference organization. The amount of the gift shall be determined annually by the Committee on Finance and approved by the conference executive committee. The conference treasurer shall pay the designated amount from the conference budget.
2. In the event of the death of a member of the Conference Executive Committee, or a past conference president of United Methodist Women or predecessor organization residing within the district, the district president shall send a "Gift in Memory" card to the family that a gift has been sent to National United Methodist Women from the conference organization. The amount shall be determined annually by the conference committee on finance and approved by the conference executive committee. The president shall notify the conference secretary and treasurer. The treasurer shall pay the designated amount from the conference budget.
3. In the event of illness of a member of the Conference Executive Committee residing in her district, the district president shall send a card. She shall notify the conference president and mission coordinator for Membership Nurture and Outreach.
4. In the event of the death of a parent, child or husband of the current Conference Executive Committee, the conference president shall send a "Gift in Memory" card stating that a gift has been sent to National United Methodist Women from the conference organization. The amount shall be determined annually by the conference committee on finance and approved by the conference executive committee. The conference president shall notify the conference secretary and treasurer. The treasurer shall pay the designated amount from the conference budget.

5. In the event of the death of a member of the Conference Executive Committee or a past conference president of United Methodist Women or a predecessor organization, the conference president shall send a "Gift in Memory" card to the family. The card shall state that a gift to mission has been sent to National United Methodist Women from the conference organization. The amount shall be determined annually by the conference committee on finance and approved by the conference executive committee. The conference president shall notify the conference secretary and treasurer. The treasurer shall pay the designated amount from the conference budget.
6. In the event of illness of a member of the Conference Executive Committee, the conference president shall send a card. She shall notify the mission coordinator for Membership Nurture and Outreach. The conference treasurer shall pay the designated amount from the conference budget.

B. HONORARIA

1. Honoraria for the speakers, leaders, pianists, song leaders and other special groups at the Annual Meeting, Spiritual Enrichment Retreat or other events planned by the Committee on Program shall be an amount determined annually by the Committee on Finance, plus travel, lodging and food.
2. Speakers, leaders, pianists, song leaders, focus group leaders and other special groups shall be notified as soon as practical of the amount of the honorarium to be awarded. The amount of the honoraria shall be recommended by the committee on finance annually and approved by the conference executive committee.
3. The treasurer shall deliver honoraria checks to the leaders/speakers/musicians at the conclusion of the event and send checks for other expenses upon receipt of expense vouchers.

C. AGREEMENTS and CONTRACTS

1. Agreements shall be made between the Conference United Methodist Women and any invited speakers, leaders, pianists, song leaders and other special groups at the Annual Meeting, Spiritual Enrichment Retreat, or other events planned by the Committee on Program.
2. Agreements shall clearly state the expectations and requirements, including but not limited to the PURPOSE of United Methodist Women, of the invited speakers, leaders, pianists, song leaders and other special groups.
3. Agreements shall state the honorarium to be presented as well as any expense reimbursement limits or stipulations.

D. TRAVEL EXPENSES

1. Mileage rate for conference & district officers to conference events shall be paid at an amount determined annually by the Committee on Finance and approved by the executive team annually at its July executive meeting.
2. Car travel of district officers: the conference shall pay for car travel mileage at the established rate to attend United Methodist Women meetings. Car-pooling to the fullest extent and is strongly encouraged and recommended.
3. Car travel of conference executive committee members: the conference shall pay car travel mileage at the established rate to attend conference United Methodist Women meetings and other conference events. Carpooling to the fullest extent is strongly encouraged and recommended.
4. Air Travel: when it is necessary for invited guests and conference executive committee members to travel by air, the conference shall pay only coach fare. Tickets shall be purchased earlier than fourteen (14) days prior to travel. If tickets not purchased timely, the amount reimbursed will be the lesser of the actual ticket amount and the amount the ticket would have been if purchased timely.
5. When a conference officer or chairperson attends a district meeting to promote a program implemented by the conference, expenses shall be paid for by the conference. When a conference officer or chairperson attends a district meeting at districts invitation, the district pays the expense. Expenses shall be paid at the yearly approved rate by the conference executive committee.
6. When a district/conference officer or district/conference chairperson attends a meeting at a local unit to promote a program implemented by the conference or district, expenses shall be paid by the district/conference at the approved annual rate. When a district/conference officer or district/conference chairperson attends a local unit meeting at the invitation of the unit, the local unit pays the expenses at the yearly approve rate.

E. REGISTRATION FEES

1. There shall be a registration fee for the Annual Meeting and the Spiritual Enrichment Retreat which is to be determined annually by recommendation from the conference finance committee and approved by the conference executive committee. The registration fee shall be paid by conference and district officers attending.
2. The amount of the registration fee for Cooperative Mission u shall be decided by the Cooperative Mission u Planning Committee. This fee shall be paid by conference and district officers attending.
3. Registration shall be for the full period of the event, except that registration for the Annual Meeting may be for one day.
4. Commuters to events at Blue lake may register and pay registration fees and meals, plus any Blue lake charges.

5. No refund of registration fees. A refund of lodging and food costs for any cancellation after the registration deadline shall be at the discretion of the Registration Committee. No refunds shall be given to those who register but do not attend.
6. Reservations made after the deadline will be subject to a late fee and the availability of lodging and food.
7. No one is guaranteed lodging and completed registration until the registration fees, lodging and food costs have been received by the Registrar.
8. If an event is cancelled, registrants shall have credit or a refund check as they choose.
9. If a check is returned by the bank for Non-Sufficient Funds, account closed or any other reason it shall be subject to same fee imposed by the bank to our account. The amount of the check plus any fees shall be paid by cash or cashier's check.

F. CONFERENCE EVENT SCHOLARSHIPS

1. There will be one scholarship awarded to Annual Day and one to Spiritual Enrichment Retreat. The recipient of the scholarship shall be chosen from one of these categories:
 - a) *First Timer*
 - b) *Under 39*
 - c) *Newly Retired women*
2. Applications for these scholarships shall be requested from the Conference Secretary or on the Conference United Methodist Women Website. Applications shall be submitted to the Conference Secretary thirty days (30) prior to the event. No application shall be considered that does not meet this deadline.
3. A committee of the secretary, coordinator for spiritual growth and the vice-president shall review the applications and choose the scholarship recipient.
4. The recipient and the conference treasurer shall be notified two (2) weeks prior to the event.
5. The recipient shall submit a registration form immediately to the registrar and the treasurer will cover the expenses.
6. If the chosen recipient is unable to attend, funds will revert to the scholarship fund.
7. The conference treasurer shall pay the designated amount from the conference budget line item for each of the events.

G. EXPENSE VOUCHERS/REIMBURSEMENTS

1. Expense vouchers shall be signed by the conference president and the conference secretary prior to payment at least quarterly by email authorization. Checks made payable to the treasurer shall be signed by the president.
2. All expense vouchers shall include receipts attached to the voucher.
3. Expense vouchers shall be sent to the treasurer itemizing each line that relates to a budget line item. Annual Day expenses: If the expense is more than the budget the conference vice-president must sign off on the voucher. Spiritual Enrichment Retreat: if the expenses are more than the budget the Spiritual Growth Coordinator must sign off on the voucher. An email authorizing overage of the expense payment must be attached by the conference president.

H. DEPENDENT CARE/CHILD CARE

1. Dependent care of an amount to be determined annually by the Committee on Finance shall be paid per day for home care to Conference Executive members who have dependent family members. The amount shall be paid for meetings at which the member's attendance is required.

I. LOVE GIFTS and SPECIAL MISSION RECOGNITION

1. Anyone leaving the leadership team after serving an elected term will receive a \$40 Special Mission Recognition Pin.
2. Anyone serving eight (8) consecutive years on the conference or district mission team shall receive a \$60 Special Mission Recognition Pin.
3. If a person serves as conference or district president for four (4) years shall receive a \$60 Special Mission Recognition Pin. The conference or district may take a love offering and the pin will be determined by the amount of the love offering in addition to the \$60.
4. A \$40 Special Mission Recognition Pin and certificate shall be presented to members of the Committee on Nominations at the conclusion of their four (4) year term.
5. Members of the Committee on Nominations who do not complete a four (4) year term shall be given a Gift to Mission card.
6. The Chair of the Committee on Nominations shall advise the Conference Treasurer of all pin recipients.

J. EXCESS FUNDS

1. When money is collected for a specific purpose and the amount exceeds the amount required, the excess funds shall go into the Unexpected Opportunities Account.
2. Officers shall not spend more than the amount budgeted unless the excess has been approved by the Committee on Finance and the Executive Committee prior to the expenditure.

3. The minimum balance of the conference general checking account shall be maintained at the required minimum balance of the financial facility as to not incur monthly fees.

K. EXPENSES FOR SPECIAL MEETINGS ATTENDED by OFFICERS

1. Members of the Conference Executive Committee shall present to the Committee on Finance requests to attend unbudgeted meetings held in connection with their officer responsibility.
2. The conference president may, upon invitation, represent the conference at the Annual Meeting of National United Methodist Women.
3. The conference president, or designated representative, is authorized to attend at conference expense, any meeting of annual conference boards, commissions, and committees of which she is a member, or any meeting to which she may contribute or from which she may receive information pertinent to United Methodist Women.
4. The conference shall pay the expenses of all conference and district officers, officers elect, and chairpersons at:
 - a) *Conference sponsored meetings of the Conference Executive Committee, standing committees, or called meetings of the conference.*
 - b) *Meetings when designated to represent the conference and expenses are not otherwise provided.*
5. Travel, food and lodging expenses of each of the three voting delegates to Southeastern Jurisdiction Quadrennial Meeting shall be paid for by the conference at a rate not to exceed \$600 each.
6. Conference officers may submit an estimate of expenses for authorized trips and draw money in advance. Estimates must be submitted in time for approval by the president and secretary.
7. Lodging expenses will be paid for district officers who do not have first night meeting responsibilities when they carpool with conference officers, if the first night expense is more cost effective than individual mileage.

L. OFFICER REIMBURSEMENT

1. All conference and district officer reimbursement include proper receipt of expenses and be on a voucher form.
2. Must be authorized and/or approved by the committee chair of that event⁶ if expenses are other than meal or lodging.
3. Must be sent to the conference treasurer no later than two (2) weeks after the event. d. All reimbursement checks are void after 90 days of date on check.

M. SCHOLARSHIPS and SUBSIDIES

1. Cooperative Mission u shall be subsidized by the Conference United Methodist Women at a rate to be determined annually by the Committee on Finance and approved by the conference executive committee.
2. Conference and district officers and nominations committee members shall receive a scholarship and travel expenses to the Cooperative Mission u at a rate determined annually by the conference finance committee and approved by the conference executive committee.
3. To receive a scholarship and travel full attendance to the event is required.
4. Conference Spiritual Enrichment Retreat shall be financed by the Conference United Methodist Women according to the budget at an annual rate determined by the finance committee and approved by the conference executive committee.
5. Members of the conference and district executive committees and nominations committee members shall receive travel and a scholarship to the retreat. The purpose is to get acquainted with local women and district officers for the purpose of securing conference leadership. To receive a scholarship and travel full attendance to the event is required.
6. Conference Annual Meeting shall be financed by the Conference United Methodist Women, according to the budget at an annual rate determined by the finance committee and approved by the conference executive committee.
7. Registration fees to conference sponsored events shall be paid by conference officers, district officers and committee on nominations members.
8. All conference and district officers and committee on nominations, request for conference reimbursement must:
 - a) Include proper receipt of expense
 - b) Be on a properly completed voucher form
 - c) Expense is other than meal or lodging
 - d) Must be authorized and/or approved by the committee chair of that event if expense is other than meal, lodging or travel
 - e) Must be sent to the conference treasurer no later than two (2) weeks of event
 - f) All reimbursement checks not cashed are void after 90 days of the date on the check.

N. CONTRIBUTIONS to OTHER AGENCIES

1. The Conference Organization shall annually contribute an amount recommended by the Finance Committee and approved by the Executive Committee to Church Women United, in the following manner: 25% to Florida Church Women United and 75% to Alabama Church Women United.
2. IMPACT/ARISE Membership
 - a) Conference shall pay for membership to Alabama ARISE and Florida IMPACT at an amount to be determined annually by the Finance Committee and approved by the conference executive committee for the Conference Social Action Coordinator and the Social Action Coordinators for the districts within the boundaries of the state of Florida, which currently are Pensacola and Marianna/Panama City Districts.
3. Other Agencies
 - a) In order for an agency to be considered for monetary support from the Alabama West Florida Conference United Methodist Women they must be in compliance with the guidelines and bylaws of the National United Methodist Women's Organization, They must complete the Annual Financial Account Report sent to them by the conference president. Failure to comply with the due date and the requirements stated on the Annual Financial Accounting Report will result in the immediate cease of funds to that organization.

O. GUESTS at MEETINGS and EVENTS

1. Retired Missionaries and deaconesses residing within the bounds of the conference may attend the Annual Meeting, Cooperative Mission u and Spiritual Enrichment Retreat as a guest of the conference with the expense of the lodging, registration and meals paid.
2. Nominees for conference office, who are not current members of the conference executive committee, shall be guests of the conference Annual Meeting including Friday evening with all expenses paid.
3. The Bishop and District Superintendents and their spouses, past Alabama West Florida and Central Alabama Conference, Women's Society of Christian Service and United Methodist Presidents, Wesleyan Service Guild Presidents/ Secretary shall be invited to the one-day United Methodist Women Annual Meeting (Saturday) with expense of registration and noon meal covered by the conference.
4. Nominees to National United Methodist Women, who are not members of the Executive Committee, shall have their expenses paid to the Jurisdiction Quadrennial Meeting in the same proportion as members of the conference executive committee.

P. CONFERENCE PLEDGE to NATIONAL UNITED METHODIST WOMEN

1. The conference treasurer shall report to the conference executive committee at each meeting of the executive committee the amount of the conference pledge to mission that has been remitted to National United Methodist Women and the amount that is still due to meet the pledge.

Q. ACCOUNTS and DESCRIPTIONS HELD by ALABAMA WEST FLORIDA CONFERENCE UNITED METHODIST WOMEN:

1. Account Excess funds shall be transferred on an annual basis.

R. LOVE OFFERING

1. A love offering may be given each year by each member of the Alabama West Florida Conference of United Methodist Women. The distribution of the Love Offering shall be approved by the conference executive committee, upon recommendation of the finance committee.
2. The distribution percentage shall be voted on annually. Current recipients are: Dumas Wesley, Cooperative Mission u, Administrative and Membership Development Fund, Assembly and Jurisdiction meetings. Allocations for each shall be recommended by the conference finance committee and approved by the conference executive committee.

S. DISTRICT CHECKING ACCOUNTS

1. District treasurers and district presidents shall both be signers of all district checking accounts.
2. The district president shall have access to all district monetary accounts.
3. The conference treasurer shall have access to all district monetary accounts only in the event of an emergency situation where both the district treasurer and district president are unable to conduct financial requirements.
4. The conference treasurer shall have all district's monetary account information on file.

II. OFFICER REPORTS

- A. Reports of meetings and activities of mission agencies that are supported by the conference organization shall not exceed five minutes. A report that is thought to be of necessity and exceeds the five-minute limit will require a suspension of the rule.
- B. Annually, at the last Executive Meeting of the year, each conference officers and each district president shall present a report of her yearly officer activities.
- C. The report shall be typed and double-spaced, not to exceed 150 words.
- D. She shall present a copy to the secretary, the president, and to her successor (if rotating off that position). Officers who are continuing in office shall include the report in the permanent file for that office.
- E. The report shall be attached to the official minutes of the conference organization.

III. PUBLICATIONS

A. REGULAR PUBLICATIONS OF THE CONFERENCE

1. The conference quarterly newsletter and the conference directory shall be the only regular publications of the Conference United Methodist Women. All conference / district newsletters/publication shall be reviewed and approved for publication by the conference president prior to being published.

B. CONFERENCE NEWSLETTER

1. There shall be a conference newsletter which shall be published quarterly. The newsletter shall be reviewed and approved for publication prior to publishing.
2. Four times a year, the purpose of the newsletter is to share information from the conference in relation to upcoming events approved by United Methodist Women and the PURPOSE.
3. Four times a year, the newsletter shall be sent to all local unit presidents (free of charge). Conference, district, local officers and all other persons that subscribes electronically at no charge or receive a printed, mailed copy at an amount to be determined annually by the Communications Committee.
4. The Winter issue of the conference newsletter shall include information about the Annual Meeting and shall reach readers six (6) weeks before the date of the meeting. Information is due to Communications Coordinator 12/10- ALERT to be mailed 1/10.
5. The Spring issue of the conference newsletter shall include information on Financial Interpretation. Information due to communications coordinator 2/10- ALERT to be mailed 3/10.
6. The Summer issue of the conference newsletter shall include information about Cooperative Mission u Event and shall reach readers six (6) weeks before the date of the school. Information due to Communications Coordinator 5/10- ALERT to be mailed 6/10.
7. The Fall issue of the conference newsletter shall include information about the Spiritual Enrichment Retreat and shall reach the readers six (6) weeks before the retreat. Information due to communications coordinator 7/10 -ALERT to be mailed 8/10.
8. All subscriptions to the conference newsletter shall run from January to December.
 - a) Annually, the mailing list of ALERT subscribers shall be purged and only those who subscribe or receive a copy because of their office shall continue to receive the ALERT. Mailed copies are sent only if they cannot be sent electronically.
9. In all cases, the use of electronic communications shall be used whenever possible.
10. Dates information is due to the communications coordinator shall be published annually in the conference directory.

11. ALERT articles written by the mission Coordinator for Education & Interpretation and the Treasurer shall be about national and international mission projects of United Methodist Women.
12. ALERT articles submitted by the Coordinator for Education & Interpretation focus on the Reading Program and include a brief book review of one of the reading program books.

C. CONFERENCE DIRECTORY

1. The following statement shall be printed in a prominent place in the directory:
United Methodist Women do not furnish lists of their elected leaders or members to individuals or agencies outside the organization unless authorized by the Executive Committee.
2. Copies of the Conference Directory shall be sent by the secretary to the following:
 - a) *Members of the conference and district executive committees*
 - b) *President of the Southeastern Jurisdiction Core Planning Group*
 - c) *Bishop of the Alabama West Florida Conference and the Administrative Assistant*
 - d) *District Superintendents of the Alabama West Florida Conference and administrative assistants*
 - e) *Alabama West Florida Conference United Methodist Women Committee on Nominations*
 - f) *Depository of Archival & Historical Materials at Huntingdon College*
 - g) *Dean of Cooperative Mission*
 - h) *Southwestern Jurisdiction Core Planning Group Chair of Nominations*
 - i) *Annual Conference Secretary*
 - j) *People appointed to office by the Conference United Methodist Women President*
3. In all cases, the use of electronic communications shall be used whenever possible.

D. NATIONAL CONSTITUTION AND BY-LAWS HANDBOOK

1. The link to download copy of the United Methodist Women Handbook shall be sent to the conference headquarters for the director of connectional ministries.
2. The Secretary will be responsible for sending them the link.

E. STANDING RULES AND POLICIES

1. Standing Rules & Policies will be publicized on the Alabama West Florida Conference United Methodist Women's website

F. WEBSITE/SOCIAL MEDIA

1. The conference president shall assign a designated person to be the Webmaster for the Conference United Methodist Women's website.
2. All content on the website must be pre-approved by the conference president, then she will forward to the webmaster.

3. The website shall never include any addresses or email information of United Methodist Women members or officers.
4. The cost of maintenance of the website shall be paid out of the conference A & MD budget.
5. All content of the district pages shall be directed to the district president and she will forward to the conference president for approval with any additions, deletions, updates, photos, etc., before sending to webmaster.
6. The website is maintained in a specific software, only the following formats are acceptable: Word documents, Excel spreadsheet, PDF, Photos (JPEG or GIF).
7. Email named contact@awf-umw.org shall be maintained and all links on the website shall be directed to it.
8. Only content that directly relates to the United Methodist Women's PURPOSE and/or our Alabama West Florida shall be displayed on the website.
9. The website cannot have links to external media with the exception of the National Organizations Resource Office official Alabama West Florida United Methodist sanctioned churches.

IV. DELEGATES AND ALTERNATE DELEGATES

- A. Alternate delegates shall be elected for all events where delegates are specified b. If a delegate cannot attend the event, she is to notify the president.
- B. The president will notify the proper alternate; If no alternate can attend the event, the president may appoint someone to attend.

V. ATTENDANCE AT MEETINGS

A. Mission team meetings

1. All members of the Mission Team are expected to attend all Mission Team Meetings. Notification to the president and registrar of a member's intention is required two (2) weeks prior to the meeting, (The Registrar shall remind those members expected of the deadline four (4) weeks prior to the meeting.) Failure to notify will be reported to the treasurer, by the registrar and any associated costs incurred will be deducted from the next reimbursement check.
2. The conference shall pay the expenses at the annual approved rate of all conference officers and district treasurers, officers-elect and chairpersons at conference sponsored meetings of the conference where attendance of the officer is required. Those officers who must travel four (4) hours or more may spend the night before the meeting at the conference expense of the approved rate.
3. Any member of the conference mission team, except district presidents, absent from two consecutive meetings where prior approval by the conference president shall be removed from office. The nominations committee will be notified to replace that member.
 - a) If the president is not notified in advance of a member's planned absence, the president will communicate with them to explain the attendance policy.
 - b) *The agenda for the current mission team meeting shall be received by the members one week prior to the meeting. Any member who does not receive an agenda one week prior to the meeting shall contact the conference president.*

B. Workshops/Seminar

1. For workshops/seminars with a pattern of attendance, the registrar shall send a registration form to all expected requesting specific registration. This registration form is to include a statement that a bill for the cost incurred by the conference will be sent to the one in the pattern of attendance who does not attend if cancellation occurs after the deadline or if not alternate attends.

C. Committee on Finance

1. Pattern of attendance at the winter Committee on Finance meetings shall be all members of the conference executive committee who are members of the committee on finance (treasurer as chairperson, president, vice-president, secretary, mission coordinators, communications coordinator and representation from the district presidents).
2. Pattern of attendance at the summer Committee on Finance meetings shall be all members of the conference executive committee who are members of the committee on finance and all district treasurers.
3. The agenda for the summer and winter finance meetings shall be set by the conference treasurer.

D. Committee on Nominations

1. Members of the conference committee on nominations may attend two events per year with the expenses to be paid by the conference at the annual approved rate and approval of the conference executive committee with the exception of the registration fee. The purpose for attending is to gain an understanding of the program of the conference and the responsibilities of each office.
2. Any member of the committee on nominations who fails to attend two consecutive meetings of the committee shall be replaced by the committee.
3. District committee on nominations may attend conference leadership development for district officers with expenses to be paid an amount recommended annually by the finance committee and upon approval of the conference executive committee, with exception of the registration fees, in applicable.

VI. APPOINTMENTS

- A. The conference president shall appoint one district president to each of the following committees:
 1. Communications,
 2. Finance,
 3. Membership Nurture & Outreach,
 4. Program,
 5. Registration, and
 6. Standing Rules and Policies.
- B. The chair of the district presidents shall be on the Administrative Committee and the process for the district president who serves on the Committee for the Charter for Racial Justice is outlined in the Handbook.

VII. RESPONSIBILITIES OF OUTGOING OFFICERS

- A. Each conference officer/mission coordinator and/or appointee, with the exception of the treasurer shall deliver to her successor in office all records and documentation pertaining to her office on or before December 1st of the year in which her term is concluded. At the conclusion of the term of secretary, treasurer, chair of nominations and president, those records of the previous quadrennial shall be sent to the archives, For example: at the end of the 2008 quadrennial, the 2004 quadrennial records shall be archived.
- B. **Conference Treasurer**
 1. Immediately prior to the conclusion of her term in office, the outgoing treasurer shall request the conference executive committee issue a resolution authorizing the removal of her name on accounts and certificate(s) of deposit and adding the name and signature of the incoming conference treasurer to said accounts and certificate(s) of deposit at the appropriate bank/foundation. A copy of the Resolution shall be made a part of the official minutes of the organization.

2. On or before 15th day of January of the year following the conclusion of her term in office, she shall deliver to the incoming treasurer all records, including but not limited. to:
 - a) check books,
 - b) savings account(s) records,
 - c) certificate(s) of deposit, and
 - d) all other records of accounts together with supporting documentation necessary to affect an orderly transfer of responsibility.
 3. She shall see that a full scope audit is performed annually by an accountant in accord with generally accepted auditing standards using the cash basis of accounting and present the auditor's report to the conference executive committee and to the National United Methodist Women. All district treasurers shall submit the district books annually, to the conference treasurer by the Annual Meeting immediately following the conclusion of her term for an audit review.
 4. Immediately after office on January 1st the incoming treasurer shall present the resolution of the Conference Executive Committee to the appropriate banks(s) /foundations and execute the necessary signature card(s)/documents as an authorized signer on behalf of the Alabama West Florida Conference United Methodist Women.
 5. The outgoing treasurer (district and conference) should destroy the financial records she has in her possession, keeping only the last 7 years of records. A permanent binder should contain annual reports and audit reports and should be passed on to the incoming treasurer. As much as possible all records should be digitized and stored on the Alabama West Florida Conference United Methodist Women's Drop Box. Those records should include bank statements, financial reports and audit reports. Expenditure (reimbursement) Forms and invoice/receipts can be digitized but should be kept for seven years in a folder or binder.
- C. **Conference Secretary** should keep all minutes, Standing Rules and Policies, list of conference officers and other important documents in a permanent binder. As much as possible all records should be digitized and stored on the Alabama West Florida Conference United Methodist Women's Drop Box.

These policies were presented and approved at the July 2020 Executive Mission Team Meeting. Betty Helms, Chair Standing Rules & Policies Committee.