

# 2019 CHARGE CONFERENCE FORM #0

## Charge Conference Report Tracking Sheet

**Instructions:** Set a date for those in leadership roles below to return documents to you so that you can prepare your charge conference materials for publication. Use the list below to help manage the charge conference documents you will need to hold a successful and complete charge conference. Churches may not need to complete all forms. Please review carefully and use those documents and forms applicable to your charge.

The submission information in the "Submit Document To" column are for signed copies of these reports to be delivered to offices outside of your local church. For more information and direct links to online forms for completion, please refer to the Conference website at [www.calpacumc.org/chargeconference](http://www.calpacumc.org/chargeconference).

NOTE: Equitable Compensation applications are no longer considered a charge conference form. Please contact your district office for a copy if you need one.

Form #	Form Name	Form completed by	Submit Document to	Due Date	Church Use
0	Charge Conference Forms Tracking Sheet		None	None	
<b>Forms #1 - #7 are related to the employment of appointed pastors &amp; Lay Persons Assigned.</b>					
1	Clergy Salary & Benefits Package (for Clergy appointed to ONE charge)	All Clergy Members appointed to <b>one</b> charge.	District Office	District Office by Charge Conference Date or 12/1/2018	
2	Clergy Salary & Benefits Package (for Clergy appointed to TWO charges)	All Clergy Members appointed to <b>two</b> charges.	District Office	District Office by Charge Conference Date or 12/1/2018	
3	Salary & Benefits Package (for Lay Persons Assigned by the bishop)	Lay Persons Assigned to a charge.	District Office	District Office by Charge Conference Date or 12/1/2018	
4	Housing Allowance Exemption Form	Clergy and churches who are not paying a housing allowance or providing a parsonage to appointed clergy.	District Office	District Office by Charge Conference Date or 12/1/2018	
5	Pastor's Certification of Payment	All Clergy Members appointed to a local church.	District Office.	1/15/2019 for 2018; one month after appointment end for mid-year changes	
6	SPRC Appointment Recommendation & Pastor Evaluation	All SPRCs at churches with Clergy Member(s) appointed or LPAs assigned.	District Superintendent. <b>This is not a public document.</b>	District Superintendent by Charge Conference Date or 12/1/2018	
7	Clergy Appointment Request Form (online form)	All Clergy Members and LPAs appointed or assigned to a local church.	District Superintendent. <b>This is not a public document.</b>	District Office by Charge Conference Date or 12/1/2018	
<b>Forms #8 - #15 are related to the charge conference, congregation, or buildings &amp; property of the church</b>					
8	Disciple-Making Report	Pastor-In-Charge	District Office	Charge Conference Date	
9.0	Report of the Pastor (online form)	Pastor-In-Charge	Submit via online form.	Charge Conference Date	
9.1	Addendum to the Report of the Pastor: Membership Audit Form	Pastor-In-Charge or designee	District Office	Charge Conference Date	
9.2	Addendum to the Report of the Pastor: Lay Leadership in the Local Church (online form)	Pastor-In-Charge at each church or designee	Submit via online form.	Charge Conference Date or 12/31/2018 for 2019 leadership	
10.0	Report of the Trustees	President of the Board of Trustees	District Office	Charge Conference Date	
10.1	Addendum to the Report of the Trustees: Facility User Groups Form (online form)	President of the Board of Trustees or designee	Submit via online form.	Charge Conference Date	

Form #	Form Name	Form completed by	Submit Document to	Due Date	Church Use
10.2	Addendum to the Report of the Trustees: Accessibility Audit of the Local Church	President of the Board of Trustees or designee	District Office	Charge Conference Date	
10.3	Addendum to the Report of the Trustees: Disaster Response Plans	President of the Board of Trustees or designee	District Office	Charge Conference Date	
11	Parsonage Report	President of the Board of Trustees or designee	District Office	Charge Conference Date	
12	Report of the Finance Committee	Chair of the Finance Committee	District Office	Charge Conference Date	
13	Fund Balance Report (Annual Audit) 2017	Auditor or Audit Committee chair at each church.	District Office	At charge conference date for 2017 audits, after Jan 1, 2019 for 2018 audits	
14	Abuse Prevention Policy Verification	Pastor-In-Charge with additional signatures required	District Office	Charge Conference Date	
15	Lay Compensation Analysis Verification	Pastor-In-Charge with additional signatures required	District Office	Charge Conference Date	
<b>Forms #16 - #23 are related to church members and clergy associated with your charge. Use as needed.</b>					
16	Lay Servant Minister Report (online form)	All local church Lay Servants, Certified Lay Servants, and Lay Speakers	Submit via online form.	After charge conference completion or 12/31/2018.	
17	Certified Lay Minister Report (online form)	Certified Lay Ministers or those applying as Certified Lay Ministers	Submit via online form.	Charge Conference Date	
18	Declaration of Candidacy for Ordained Ministry	Individuals <b>declaring</b> candidacy for licensed or ordained ministry	Send copies as directed.	After charge conference completion	
19	Candidate for the Ministry Yearly Report	Individuals <b>renewing</b> candidacy for licensed or ordained ministry	Send copies as directed.	After charge conference completion	
20	Annual Report of the Deacon in Provisional or Full Membership (online form)	<b>Provisional deacons or full deacons</b> who are related to each church by appointment or charge conference	Submit via online form.	Charge Conference Date	
21	Annual Report of Clergy On Leave (online form)	Clergy Members <b>who are on leave</b> and related to a church by charge conference	Submit via online form.	Charge Conference Date	
22	Annual Report of Extension Minister (online form)	Clergy Members <b>who are serving an extension ministry</b> and relating to a church by charge conference	Submit via online form.	Charge Conference Date	
23	United Methodist Women Local Unit Membership Report for 2018 (online form)	President or designee of local UMW unit	Submit via online form.	Charge Conference Date	
<b>APPENDIXES &amp; RESOURCES: The information below is provided to assist you in completing charge conference forms.</b>					
A	Salary & Benefits Guidelines				
B	Minimum Compensation Standards				
C	Clergy Tax Packet, includes <ul style="list-style-type: none"> <li>Housing Allowance Q&amp;As</li> <li>Clergy Housing Allowance Clarification Act of 2002</li> <li>Accountable Reimbursement Policy (Long Form Sample)</li> <li>Accountable Reimbursement Policy (Short Form Sample)</li> <li>Group Ruling Request on Tax Exempt Status for Churches</li> </ul>		This information is provided online by the General Council on Finance & Administration (GCFA). Refer to your tax professional for more information.		
D	Local Church Audit Guide		This information is provided by the General Board of Discipleship (GBOD).		
E	FAQs About Local Church Audits				
F	2019 Medical, Dental and Vision Rates		When available, visit <a href="http://www.calpacumc.org/bophb/health">www.calpacumc.org/bophb/health</a> for more information.		