

2021 Charge/Church Conference Packet

Directions for Preparing for the Charge/Church Conference

The primary responsibilities of the charge/church conference in the annual meeting is to review and evaluate the total mission and ministry of the church, receive reports, and adopt objectives and goals recommended by the church council that are in keeping with the objectives of The United Methodist Church. The charge/church conference forms are provided to assist in preparing for your annual meeting.

While it is the pastor's responsibility to make sure that these forms are completed each year, lay leaders and staff are often involved in the completion of the charge/church conference forms. Please be certain that this information is shared with those in leadership roles.

Please remember that your charge or church conference must be authorized by the district superintendent and an authorized elder must preside. The conference also must be announced in advance - how far in advance is dependent on the church's incorporation (15 days for 315 unless sale of property is involved when it then is 30 days, two weeks for 317A, or in accordance with other applicable state laws). The conference also must be announced in at least two of the following methods: from the pulpit of the church, in its weekly bulletin, in a local church publication, or by mail.

Report/Form	Due to district/conference offices	Body that needs to act on form/report	Where the form/report needs to be sent	Additional Information
Clergy Compensation - Forms 5 & 7	By December 1, 2021	charge or church conference	Email as an attachment to ccforms@minnesotaumc.org	The payroll worksheet portion of the document does NOT need to be completed before sending forms 5 & 7 to ccforms@minnesotaumc.org .
Leadership List – Form 1	No later than 2 weeks after the charge/ church conference or March 15, 2022 (whichever is first)	charge or church conference	Online form is automatically submitted to district/conference offices and conference registrar... but only if you hit the "Submit Form" button.	Any changes in leadership after this form has been submitted should be reported to the district administrative assistant.
Reports of Certified Lay Speaker, Certified Lay Servant, and Certified Lay Minister – Form 2	No later than 2 weeks after the charge/ church conference or March 15, 2022 (whichever is first)	charge or church conference	Online form is automatically submitted to district/conference offices and conference lay ministry team...but only if you hit the "Submit Form" button.	If your church does not have any <u>certified</u> lay speakers, servants, or ministers, these reports do not need to be completed.
Recommendation of Candidate for Ordained Ministry – Form 3	No later than 2 weeks after the charge/ church conference or March 15, 2022 (whichever is first)	charge or church conference	Online form is automatically submitted to district/conference offices and conference registrar... but only if you hit the "Submit Form" button.	If your church does not have any current candidates for ordained ministry, this form does not need to be completed.
Inactive/Unresponsive Membership Report – Form 4		charge or church conference	Retained only in church records – do <u>not</u> submit to district/conference offices	
Parsonage Allowance Resolution – Form 8a		church council	Retained only in church records – do <u>not</u> submit to district/conference offices	If the church does not have a parsonage or if it is being rented out to someone other than the appointed clergy, this form does not need to be completed.

Report/Form	Due to district/conference offices	Body that needs to act on form/report	Where the form/report needs to be sent	Additional Information
Housing Allowance Resolution – Form 8b		church council	Retained only in church records – do <u>not</u> submit to district/conference offices	If the pastor does not receive a housing allowance, this form does not need to be completed.
Annual Parsonage Evaluation – Form 9		to be given as a report to charge or church conference but no action required	Retained only in church records except if the church experiences a change in pastoral appointment when it is then to be included with the updated church profile	If the church does not have a parsonage, this form does not need to be completed.
Report of the Trustees – Form 10	No later than 2 weeks after the charge/ church conference or March 15, 2022 (whichever is first)	to be given as a report to charge or church conference but no action required	Email as an attachment to ccforms@minnesotaumc.org	
Checklist for Protection of Church Finances – Form 11		church council	Retained only in church records – do <u>not</u> submit to district/conference offices	
Fund Balance and Certification of Annual Audit – Form 12		to be given as a report to charge or church conference but no action required	Retained only in church records except if the church experiences a change in pastoral appointment when it is then to be included with the updated church profile	
Annual Budget	No later than 2 weeks after meeting at which approved or March 15, 2022 (whichever is first)	church council	Email as an attachment to ccforms@minnesotaumc.org	No specific form is provided. Please submit in whatever format the church uses.
Missions Report – Form 13	No later than 2 weeks after the charge/ church conference or March 15, 2022 (whichever is first)	to be given as a report to charge or church conference but no action required	Online form is automatically submitted to district/conference offices...but only if you hit the “Submit Form” button	
Annual Report of Appointed or Assigned Clergy - Form 14		to be given as a report to charge or church conference but no action required	Retained only in church records – do <u>not</u> submit to district/conference offices	Provided form does not have to be used. A personal narrative with similar information may be substituted.
Annual Report of Retired Clergy (<u>not</u> serving under appointment or assignment) - Form 15		to be given as a report to charge or church conference but no action required	Retained only in church records – do <u>not</u> submit to district/conference offices	Provided form does not have to be used. A personal narrative with similar information may be substituted.

A copy of the minutes and attendance roster from the charge/church conference are to be forwarded to the district administrative assistant.

While not part of the charge/church conference packet or action, please remember that the annual year-end Tables I, II, and III are due by March 15, 2022. These forms are completed online. You should receive a notice when the Tables are posted for your access. Additional information is available at www.minnesotaumc.org/tables.

Two Logistical Requests:

- Please submit the required forms only by emailing them to ccforms@minnesotaumc.org if at all possible. With some of the conference/district office staff having a hybrid working arrangement (some days working remotely, some days in the office, mailing print copies of the forms/reports will delay how soon they are received and filed. Thank you for honoring this request.
- When emailing the required forms to ccforms@minnesotaumc.org, please attach each form/report as an individual document. Please do not combine the forms/reports into one document. We do not need your full conference packet. (You definitely may include multiple attachments on one email.) We appreciate your following of this request.

Technical Information:

- **Online Forms:** It may be helpful to print a copy of the form to use in gathering needed information. However, your final information needs to be submitted using the online form. Please remember to hit the "Submit Form" button at the bottom of the form so that your form is actually submitted. To save a copy of your completed online form, proceed as though you are going to print a copy but change the printer option to "save as PDF"
- **PDF Forms:** Fill PDF forms using Adobe Reader (Windows or Mac) or Preview (Mac). It is recommended that you download each PDF form, save it, and then complete it (remembering to save as you go along).
- **How to electronically sign a fillable PDF:**
 - **Windows:** Open the PDF in Adobe Reader. (Install if you do not already have this software. <https://get.adobe.com/reader/>.) Click "Fill & Sign". For detailed instructions, go to <http://bit.ly/2ITIO2A>, scroll down to the Windows instructions and follow the step-by-step directions.
 - **Mac:** Open the PDF in Preview, an application already on your computer. Click the toolbox shaped button, then click "Sign." For detailed instructions, go to <http://bit.ly/2ITIO2A>, scroll down to the Mac instructions and follow the step-by-step directions.
- **Problems with a fillable PDF:** After first making certain that you are using the current version of Adobe Reader (<https://get.adobe.com/reader/>), if you continue to have problems with formatting within a form, contact ccforms@minnesotaumc.org to ask if the form template is available in an alternate format.

May the time spent completing these reports/forms and preparing for the charge/church conference help you gain a deeper awareness of the important work that you are doing in your communities to reach new people, help people grow in their love of God and neighbor, and heal a broken world.