

# Charge Conference Paperwork Checklist

For a copy of this Checklist that includes form links visit <http://UMCPensacolaDistrict.org/ChecklistWithLinks>.

## **Send these reports to the District Superintendent at least one week before your Charge Conference meeting:**

- Summary List of Nominations and committee Members to be voted on at charge conference
- OR** Report of the Committee on Nominations and Leadership Development (Lay Leadership form)
- Report of the (Senior) Pastor  
*(The Report of the Pastor form asks for the names of those added and subtracted from the roll by category. What senior pastors are to send in advance is the total number added and subtracted by category, the number baptized, and to answer these questions: (1) Have you conducted a confirmation class this past year? and (2) How many have been confirmed?)*
- Pastor Compensation Form for all clergy serving under appointment  
*(Effective date must show start AND end dates. Home address must include city, state, and zip code.)*

**SIGNATURES are  
REQUIRED  
where requested.**

Your charge conference paperwork is not complete unless signatures are on all forms where requested.

## **At the Charge Conference meeting:**

- Welcome/ Devotion
- Appointment of the Secretary *(The secretary should sign the minutes form.)*
- Attendance Register *(Sign-in sheets must be submitted with charge conference paperwork.)*

## **Reports to be acted upon during the Charge Conference and submitted in the packet:**

- Summary List of Nominations and Committee Members to be voted on at charge conference *(Provide copies to hand out.)*
- Report of the Committee on Nominations and Leadership Development (Lay Leadership form)  
*(Neither the Summary List nor Church Dashboard update replace this report. Show complete mailing addresses, phone numbers, and e-mail addresses.)*
- Lay Servant/Speaker Annual Report(s) *(Use new forms - <http://umcpensacoladistrict.org/ccforms#layservant-layspeaker>.)*
- Lay Minister Annual Report *(if applicable)*
- Report of the (Senior) Pastor *(By each name put date added/removed/baptized. The dates help clarify Jan.-Dec. Ezra reporting.)*
- Vote on persons to be removed from the Church roll by action of the Charge Conference
- Safe Sanctuaries Covenant
- Pastor Compensation Form for all clergy serving under appointment  
*(Effective date must show start AND end date. Home address must include city, state, and zip code.)*



## **Other reports to be submitted as a part of the Charge Conference packet:**

- Minutes form *(For question 16 you can list things such as Imagine No Malaria, White Christmas, etc.)*
- Report of the Trustees
- Report of the Committee on Finance
- Most recent financial statement reflecting income, expenditures, and correct balance on ALL funds
- Pastor's Annual Continuing Education Report *(one for EACH pastor plus certificates documenting CE credit)*
- Local Church Annual History Report *(required even if your church does not currently have an historian)*
- Local Church Representative for the District Board of Church Development
- Copies of the Minutes of any special sessions of a Charge/Church Conference held during the year
- Campus Ministry Report
- Parsonage Checklist **(REQUIRED)**
- Deacon Annual Report *(if applicable)*
- Appointment to Extension Ministry *(if applicable)*

**IF A FORM  
DOES NOT APPLY**  
send a blank copy of it  
(page one)  
clearly marked "N/A"  
or "Does Not Apply."

This lets the district office know that you didn't accidentally omit it.

## **Of the forms listed above, these require one for each CHURCH on the CHARGE:**

- Minutes of the Charge Conference
- Campus Ministry Report
- Local Church Annual History Report
- Report of the Committee on Finance
- Report of the Trustees

## **Of the forms listed above, these have mailing instructions:**

- Appointment to Extension Ministry *(if applicable)*
- Campus Ministry Report
- Deacon Annual Report *(if applicable)*
- Lay Minister Reports *(if applicable)*
- Lay Servant / Lay Speaker Reports *(if applicable)*
- Local Church Annual History Update *(required)*
- Pastor's Annual Continuing Education Report *(CE credit requires sending also copy of CEU certificates)*

## **Information to submit online:**

- Update your Local Church Dashboard before **December 15. THIS FORM SHOULD BE SUBMITTED.**  
Make sure all contact info (including e-mail address) is provided for your leaders.  
Put an END DATE for persons who will be no longer serving in that particular position.  
The Summary List and the Report of the Committee on Nominations and Leadership form do not replace this report.  
For more information visit <http://umcpensacoladistrict.org/OnlineReports#database>.  
If you need assistance please contact the district office.