

Charge Conference Reports: Preparation and Instructions for Local Churches

Want to be AHEAD of the game for Charge Conferences? Schedule your parsonage inspections and air quality tests now, while the weather is nice and there is no rush. Air quality tests are due every other year.

Several things have been added to the annual cycle of reports and one is linked to charge conference reports:

1. Instead of an appointment recommendation from pastors and SPRC, that will be covered within the clergy assessment.
2. Clergy/ministry assessments from pastors and SPRC committees will be due December 1. Information will be sent in early September.
3. Every pastor or lay person serving will need to have a background check completed by December 1. Go to <http://inumc.org/backgroundchecks>

Prepare: Schedule essential meetings now

- SPRC: to set the pastor's salary and housing for 2023; pastor should also set a housing exclusion (only clergy may claim a housing exclusion) and make adjustments to UMPIP if applicable.
- Trustees:
 - **inspect the parsonage* annually, and test air quality*** every other year;
 - identify all fund balances and income to funds since 1/1/2022 and specify the use of income;
 - conduct the annual accessibility and insurance audits*;
 - make sure deeds and other legal documents are *secured off site* in the care of a trustee and that the location of deeds recorded in county records is identified.
- Membership:
 - gather names for baptisms, professions of faith, transfers in and out, and deaths since 1/1/2022.
 - Contact inactive members to determine membership wishes;
 - List names to be read 1st year, and 2nd year listing to remove by charge conference action.
- Nominations and Leadership Development to verify leaders who will continue to serve *in the coming year* and identify and recruit new leaders. The Leadership Report is to list those who will serve in 2023.

Access

Pastors' emails *only* are retained year to year. No laity emails are saved from the previous year. A pastor may add a user.

Access directly through the Charge Conference Website [here](#). Use your Conference email address.

- To reset your password, click on "Forgot your password?"
- If someone other than the pastor will fill out the charge conference forms online (such as charge conference secretary, church secretary, etc.):
 - The pastor needs to add them as a new user and the person will need to access the forms by going [here](#).
 - Users can also be added by request [here](#).

Charge Conference Date and Reports Submission Deadline

It is recommended that your board or council meet to review and approve the information in all the reports to be submitted to the charge conference. After submitting reports are approved, a signature page will be the cover sheet of the charge conference reports

- The date shown on the charge conference report header is the date of the actual conference. *Reports are due prior to this date* to allow time to review, make corrections if necessary, and approve them. (Each district has different deadlines for submitting reports.)
- Signature pages of approved reports are due as directed by your district.
- These deadlines are so your conference assistant and superintendent may prepare properly and to allow time for any corrections before the reports are approved. *Each assistant has at least 200 churches' reports to review.*

Eighty-five percent of charge conference reports are not approved the first time. Common issues are addressed in this guide.

Completing the Reports

1. Church Information

Make *changes* only; do not fill in information unless you are making a change or correction.

2. Parsonages

If your church has a parsonage, you will need to submit the Parsonage Inspection (Pastor/Church Agreement Parsonage Condition) form. Annual parsonage inspection is addressed in the 2016 Book of Discipline, par. 258.2.g.16. You may complete the inspection and air quality test at any time of the year.

Your charge conference reports require the dates of your annual parsonage inspection (every year) and the air quality test (every other year). You may use the air quality test provided by an environmental services company such as ServePro, a county health department, or another testing company. Send a copy of each report to the district center.

- Whether your parsonage is occupied by the pastor, rented, used for another purpose, or vacant you are still required to inspect the parsonage annually. Be sure to mark how the parsonage is used: pastor's home, rented, other (and what the 'other' purpose is).
- An air quality (mold) test must be done every other year.
 - If inspected/AQ test since the date of last CC, please fax or email the inspection report to your district center;
 - Enter the date(s) on the parsonage form.

3.Compensation Report to report clergy compensation is for the *coming year*.

The amount of compensation shown is the *current, 2022* salary. *Change this amount to reflect the 2023 compensation.* Any pastor currently at minimum salary must be at least at the 2023 minimum beginning Jan. 1. If serving more than one church, the total salary from all churches must equal at least the minimum salary for 2023. (see the chart below)

UMPIP Form

ALL pension participants in UMPIP must complete and submit the “Contribution Election” form to the Conference Center, 301 Pennsylvania Parkway, Suite 300, Indianapolis, IN 46280. On the Compensation report you may mark “No Change” if the dollar amount or the percentage remains the same as the current year.

Due to the updates in our systems and changes in our infrastructure, we are requiring all participants to submit the form even if no changes are desired. Even if a waiver has been done in the past. On the Compensation report, the clergy person may simply state, "No Change in Contribution" where the amount or percentage goes if they like.

2023 Clergy Minimum Compensation

2023 DAC	\$76,221	Minimum	Formula
Elder, Deacon, Othr Conf	Full time	\$45,732.60	76,221 X .60
FE_PT, FD_PT, OT (OE, OD)	3/4 time	\$34,299.45	45,732.60 X .75
FE_PT, FD_PT, OT (OE, OD)	1/2 time	\$22,866.30	45,732.60 X .50
(Denom), Othr Methodist Denom, Othr Conf Prov			
	Full time	\$44,208.18	76,221 X .58
PE_PT, PD_PT, AM_PT, OF/OE (OM), OTP*	3/4 time	\$33,156.14	44,208.18 X .75
PE_PT, PD_PT, AM_PT, OF/OE (OM), OTP*	1/2 time	\$22,104.09	44,208.18 X .50
Local Pastor, full-time			
	Full time	\$41,921.55	76,221 X .55
Local Pastor, 3/4 time	3/4 time	\$31,441.16	41,921.55 X .75
Local Pastor, 1/2 time	1/2 time	\$20,960.78	41,921.55 X .50
Local Pastor, 1/4 time	1/4 time	UMPIP only (church becomes sponsor if church contributes)	NOT CRSP
Assigned Supply, Lay Minister			
	not eligible for CPP or CRSP	Church can sponsor UMPIP	
Retirees			
	not eligible		
EXTENSION MINISTERS (BOD 344.1)			
Clergy appointed to Conference or District	use payroll #s		

- **Membership Report**

Count those persons from January 1, 20xx (current year) to a date prior to the date forms are submitted (example: if reports are due Oct 15, choose “as of Sept 30”).

- The United Methodist Church does not recognize infant/baby/child dedications; list only baptisms.

- If removing names by charge conference action be sure these names are circulated among the membership and leaders *prior to* the charge conference. These names will have been listed for removal for the first-time last year and, with no objections, will be removed as of the second reading at a church council meeting just prior to the annual charge conference.

4.Trustee Report

- List a minimum of 3 trustees and a maximum of 9. These will be trustees for the coming year.
- The church and parsonage(s), if applicable, need to be listed under "Property Titles" and any other property the church may own with location of deeds in county records. *No reports will be approved without this information.*
- The name of the custodian of legal papers is **required** along with contact information as well as the specific location where these papers are kept. (It is recommended that all legal documents be kept off premises in the care of a trustee, either in a fireproof safe or bank safety deposit box.) *The county court house or other public entity is not the custodian nor the location of legal documents.*
- "Funds" refer to all funds *other than Operating Fund*, including long term investments or endowments, as well as designated funds for which use of income is restricted. List all current year income (or loss of investment) and the designated use of income (whether used or not). "Date" is the date that fund was *established*.

Funds Do not list Operating Fund					
List Income producing and permanent funds.					
+ Add new record	When Fund began initially	The fund balance since 1/1, as of last statement	year-to date interest, dividends, growth or (loss) if invested	Whether used or not	
Fund Name	Date Rec'd	Amount	Where Invested?	Income	Income Use

- Accessibility audits (Book of Discipline 2016, Par. 2533.6) and insurance audits (Par. 2533.2) are required annually. Use the forms found in the [Charge Conference Appendix](#). (The default setting is "NO" so be sure to check the correct response.)
- Certification of Trustees for unincorporated churches will need to be filed with your county clerk/recorder after the first meeting of the trustees when the chair is officially elected, after Jan 1 but before Jan 31.

Recommendations - list NEW persons recommended for ministry.

Candidates list the continuing candidates for ministry who are *already in the process*. Local pastors who have been appointed are not to be listed here.

Lay Servants/Speakers and Certified Lay Ministers listed will need to complete the [annual report](#) and submit to the district center prior to the charge conference.

5. Missions

List *only one time* any ongoing missions/outreach such as a food pantry that is open weekly or monthly.

You may list missions to which you have sent only contributions, but do not list Special Sundays or Advance Specials here. If you have no current (2022) mission projects, save the blank form. Please be sure to check the dates entered are 2022 only.

2023 Leadership Directory - The names listed on this report when you open it are for CURRENT year leadership; update any positions with names for the coming year. (Please double check any contact information that is auto-populated on the report to be sure it is current and correct; do not list the church address, email, or pastor's email for lay leadership contact information.) Please list those who will serve beginning 1/1/2023

- **Staff Parish Relations Committee** - No staff member or immediate family member of a pastor or staff member may serve on the committee. Only one person from an immediate family residing in the same household shall serve on the committee. (Book of Discipline 2016, Par. 258.2.a)
- The positions of **Treasurer and Financial Secretary** should not be combined and held by one person, and the persons holding these two positions should not be immediate family members. (Book of Discipline 2016, Par. 258.4)
- It is recommended that the leadership of each local church be diverse and representative of the whole congregation. *Individuals should not hold multiple positions, especially of key leadership positions.* Where this is challenging or impossible, please consult with the Conference Superintendent or the Associate District Superintendent prior to completing the leadership list.
- ****PLEASE** review the auto-populated information** to be sure the correct name, address, phone number and email are listed for each person.
- Superintendents are communicating with the leaders of the churches more than ever, so it is vital to have their correct contact info to maintain our connection.
- **Do not list the church address** for persons in leadership positions.
- **Treasurers and Staff Parish chairs need to have a private email** listed to receive critical information sent by the Indiana Conference. This email should not be the pastor's email. If that person does not have an email account, please designate an email to receive communication intended for each. Please list all known phone numbers (home, cell, work) for SPRC chairs.

Please refer to the [Charge Conference Appendix](#) on the INUMC website for additional forms. Submit only those forms requested and retain worksheets for church records.

If you have any questions, please contact the conference assistant assigned to your district.