

## Metro District Charge Conference Checklist

### REQUIRED REPORTS:

#### 1. Minutes of Charge Conference. \*

- \_\_\_\_\_ a. "Minutes of Charge Conference" form (Form available online at [www.northtexasumc.org/connectional-resources/forms](http://www.northtexasumc.org/connectional-resources/forms))
- \_\_\_\_\_ b. Minutes taken by Recording Secretary during Charge Conference (**a narrative report**)  
(Due in District office 1 week after conference.)
- \_\_\_\_\_ c. Name and e-mail address of recording secretary for Local Church conference
- \_\_\_\_\_ d. Sign in Sheet (A sign – in sheet. Please turn in with minutes.)

#### 2. Pastor's Report. \*

- \_\_\_\_\_ a. State of the Church
- \_\_\_\_\_ b. Pastor's Continuing Education Form (Form available online at [www.northtexasumc.org/connectional-resources/forms](http://www.northtexasumc.org/connectional-resources/forms))
- \_\_\_\_\_ c. Membership Report: (Completion of items 1, 2, 3 & 4 on Report of the Pastor  
(Form available online at [www.northtexasumc.org/connectional-resources/forms](http://www.northtexasumc.org/connectional-resources/forms))  
.(This should include all church members, names, addresses, phone numbers, and e-mail if they have it

#### 2. Trustees Report (Form available online at [www.northtexasumc.org/connectional-resources/forms](http://www.northtexasumc.org/connectional-resources/forms))

- \_\_\_\_\_ a. Annual Report \*
- \_\_\_\_\_ b. Parsonage Inspection & Report. \*
- \_\_\_\_\_ c. Annual Accessibility Audit \*

#### 3. S/PPRC Report

- \_\_\_\_\_ a. Ministerial Compensation
- UMPIP Calculation Worksheet (to be completed online at <http://ntc.umconline.org>  
– worksheet must be done before report can be completed.)
  - Report -- use form provided by NTC [printed from online submission]
  - Reimbursement Policy. \* (no form provided, Go to <http://www.gcfa.org/TaxPacket.html> )
  - Housing Allowance Resolution\*
- \_\_\_\_\_ b. Candidates for Ordained Ministry
- Recommendation for Candidacy Continuation by S/PPRC. \* (Complete Part V. of "Minutes of Charge Conference" form. Use additional pages if necessary)

#### 4. Finance Committee (Form available online at [www.northtexasumc.org/connectional-resources/forms](http://www.northtexasumc.org/connectional-resources/forms))

- \_\_\_\_\_ a. Report. \*
- \_\_\_\_\_ b. Budget – no form provided, format of your choice  
(Turn in a copy of 2022 budget to District office as soon as approved by Ad Council)
- \_\_\_\_\_ c. Fund Balance Report
- \_\_\_\_\_ d. 100% Apportionments paid by \_\_\_\_\_ (date)

#### 5. Nominations Committee Report – no form provided, format of your choice. \*

(This should include the names of all committee members, not just the chair and the dates they roll off.)

#### 6. Local Church Leadership Roster (This should include all chair persons, names, address, phone number, and e-mail if they have one) [printed from online submission <http://ntc.umconline.org>]

#### 7. Local Church Agencies Reports (e.g., UMW, UMM, Youth Council)

– no form provided, format of your choice written. \*

#### 8. Report of Lay Servant Annual Report (Form available online at [www.northtexasumc.org/connectional-resources/forms](http://www.northtexasumc.org/connectional-resources/forms))

\* Please refer to the *Guidelines for Charge Conference Reports* sheet for individual report instructions.

**All forms are to be completed and submitted on or before the date you were notified of with the date of your Charge Conference.**

#### ADDITIONAL REPORTS OR INFORMATION

- Equitable Salary Request (supplied by District Office as needed)
- Appointee and/or Dependant Health Insurance Supplement  
(You must call the District Office to request application forms)