

## 2022 INSTRUCTIONS FOR THREE RIVERS CHARGE CONFERENCE FORMS

The purpose of Church/Charge Conference forms is for each local church to annually assess their effectiveness in making and maturing disciples and to chart their intended course for the coming year. These forms are opportunities to tell your church's story of ministry and mission. **2022 paperwork is available on [TR district website](#) under the "forms" tab. Each form has been redesigned and is required.** The new designs have streamlined much of the information, eliminating duplicity. Churches should save the pdf for annual updates, reducing the need to 're-type' information each year. The best practice is to submit completed digital copies via email. Digital signatures are acceptable or forms may also be signed during consultations. **Each district will send instructions with a schedule specific for their churches and pastors.** District due dates and instructions override general directives. **Submit all forms to your District Office 2-3 weeks prior to meetings or as otherwise requested by your D.S.**

**Three Rivers Clergy:** The following are due as indicated on the accompanying Three Rivers schedule; **approx. 2 weeks before your consultation with the District Superintendent**

- Clergy Self-Assessment (formerly known as CPA – Clergy Profile Annual)
  - Deacons Only Report (if applicable; attached to the Clergy Self-Assessment form)
- Clergy Personal Info Form (aka Clergy BIO) – required for new clergy or those that did not update in 2021
- Clergy Profile – Long Term Information (CPL) – needs updated every 3 years

**Three Rivers S/PPR:** The following are due per attached schedule (approx. 2 weeks before meeting the D. S.)

- Clergy Assessment Form (formerly known as Ministry Assessment) – **S/PPR & Clergy Complete TOGETHER!**
- Local Church Self-Assessment (formerly known as the LCPA – Local Church Profile Annual)
- Church BIO (replaces the LCPL)

**Three Rivers Charge Conferences are on Sunday, October 16.** (see attached schedule for times and locations)

- The Church Board or Administrative Council, working with the Trustees & Finance Committees, along with the clergy, need to send the following forms to the Three Rivers District Office **by October 4.**
- Charge Conference Minutes, including the following reports
  - Pastor Report
  - Lay Leader Report
  - Candidacy/Ministry Recommendation Report
  - Church Leadership Nominations Report
    - **All leadership information must be entered into Brick River no later than December 1**
  - Church Membership Report
  - Church Safe Sanctuaries Policy Report
  - Church Trustees Report and Parsonage Inspection Report
  - Church Volunteer in Mission Team Report, if applicable
- 2023 Compensation Forms & Budget
  - 2023 Clergy Compensation Report **\*include all worksheets\***
  - Clergy Housing Exclusion Resolution, if applicable
  - 2023 Local Church Budget – due December 1, 2022
- Lay Servant Reports
  - Submit to the District Office after Church Council approval and signed by clergy. Upon Charge Conference approval, the DS will sign & send to the District Lay Committee Director.
    - Only CERTIFIED Lay Servants, Certified Lay Minister, & Lay Speakers submit reports
      - Lay Servants **MUST** attend training every 3 years.
      - Lay Speakers & Certified Lay Minister standards are explained on their forms

## *Pastor & Church Conference Preparation List*

Use this checklist as a planning tool to assist in planning your fall calendar for timely completion of charge conference forms and other paperwork. First, determine dates of S/PPRC meetings and Conferences. Then calculate the due date for paperwork which is a minimum of 2 weeks prior to each meeting. **Refer to your district's specific instructions for precise scheduling!** **Work backwards from that date** to establish the best time frame to complete the necessary committee meetings and related tasks taking into consideration your local church agenda as well. This list is not inclusive. You may add meetings and make adjustments as best suits your local congregation.

1. \_\_\_\_ **Record Dates/Times/Locations on Calendars** for Clergy & S/PPRC consultations and Charge Conferences.  
Refer to the instructions specific to your regard when and how to complete forms. **Most are due 2-3 weeks prior!**
2. \_\_\_\_ **Call SPRC Chair.** Inform them of date, time and place of the S/PPRC Meeting with the DS.  
\_\_\_\_ Ask the chair to notify the entire committee of same.
3. \_\_\_\_ **Schedule meetings with leadership** (see items # 8,9 & 10 below for detail) to start necessary tasks
4. \_\_\_\_ **Announce** in Bulletin (3 consecutive weeks prior to date) the time/place of the S/PPRC meeting & Charge  
\_\_\_\_ Inform Lay Leader and Committee Chairs of all meetings and deadlines.
5. \_\_\_\_ **Schedule Nominations Committee** meeting at least one month prior to Charge Conference. You will need time to confirm names to include on the Leadership Report due before Charge Conference.
6. \_\_\_\_ **Schedule S/PPR Pastor-Parish Relations Committee Meeting** to complete following tasks  
\_\_\_\_ Ministerial Matters: complete Clergy Assessment, LCPA & Church BIO (2 weeks before DS consult)  
\_\_\_\_ set Pastor's salary/reimbursements; discuss healthcare/pension per EOC benefit guidelines.  
\_\_\_\_ evaluate Staff performances; establish salaries/compensation
7. \_\_\_\_ **Contact Lay Servants** [forms on conference website for Lay Servant, Lay Speaker and Lay Minister]  
\_\_\_\_ Provide your lay servants with Annual Report and a return date prior to the church council meeting where their request or renewal will be approved. (See item #10) *Encourage new applicants!*
8. \_\_\_\_ **Schedule Finance Meeting** (new year apportionment figures will be available by end of September)  
\_\_\_\_ Set due date for committee budget requests.  
\_\_\_\_ Set due date for books/funds to be submitted to Audit Committee for review (see # 15)  
\_\_\_\_ Stewardship planning if applicable  
\_\_\_\_ Budget ( review recommendations from S/PPRC for pastor and staff salary and benefits)
9. \_\_\_\_ **Schedule Trustees Meeting** to complete the following:  
\_\_\_\_ Goals \_\_\_\_ Budget \_\_\_\_ **Parsonage Inspection\*** (complete prior to charge conference)
10. \_\_\_\_ **Schedule Administrative Council or Board Meeting** several weeks prior to charge conference  
\_\_\_\_ Appoint Membership Committee (if applicable to perform a membership audit)  
\_\_\_\_ Set Goals for coming year (**NEW IN 2022:** See Local Church Self-Assessment Form)  
\_\_\_\_ Approve lay servant requests (annual form as described above in item # 7)  
\_\_\_\_ Set due dates for info needed to complete year end reports (i.e. attendance, finances) (see #13)  
\_\_\_\_ Approve pastor's housing exclusion if applicable (this can also be done at Charge conference)
11. \_\_\_\_ **Submit all required paperwork** to your District Office per your district instructions
12. \_\_\_\_ **December 1, 2022 is deadline for 2023 budget** to be sent to district office if it was not included at Charge Conf.
13. \_\_\_\_ **December 1, 2022 is deadline to enter leadership into new database, Brick River** (or send to district office)
14. \_\_\_\_ **January 20, 2023 -- Year End Local Church Reports are due** (submit on the EZRA website).  
Emails with reminders, details, instructions and links to website will be sent out in December.
15. \_\_\_\_ **March 28, 2023 — Audits are due** in the district office

\*If your **parsonage was inspected** by the District Board of Building & Locations this year, you may notify the district office to substitute that report for the current year only. Updates completed from their recommendations can be noted/attached to the Trustees & Property Report as part of Charge Conference required reports.