

# Charge Conference Forms MADE EASIER (but still not easy)

Cal-Pac Learning Labs, September & October 2025  
[www.calpacumc.org/chargeconference](http://www.calpacumc.org/chargeconference)

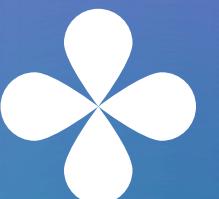


Presentation by Jennifer Gaylord  
(and the AWESOME District  
Administrative Assistants)

# Today's Plan

**Feel free to ask questions at any time!**

- ✓ Introductions & Opening Prayer
- ✓ What and why we Charge Conference
- ✓ Where to find the forms and other resources
- ✓ How to fill out a form and sign it (general process)
- ✓ Major changes from last year
- ✓ Let's practice
- ✓ Frequently Asked Questions (FAQs) & how to get help
- ✓ More Questions & Answers
- ✓ Thank you for coming!

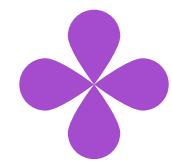


# Jennifer Gaylord



I am the current Conference Statistician and the Associate Director of Data Services & Special Projects. You may know me from Annual Conference registration, annual data updates for yourself or your church, your statistical collection (my first one was last year), event registrations and payments, and charge conference forms. I like the color purple, dogs, and all of you.

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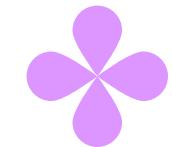


Your District Administrative Assistants are:

- East: Dany Caguin
- Hawaii: Sonya Lee
- North: Jan Newton
- South: Emilie Penuelas
- West: Polly Sablan

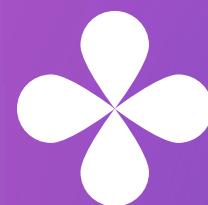


Your district administrative assistants are here to guide you through the charge conference process. They will help organize the time, the presiding elder or district superintendent's attendance, the agenda, the documentation both in advance and after, and the actual event.



# A verse from 1 Corinthians 12:28

And God has appointed in the church first apostles, second prophets, third teachers, then miracles, then gifts of healing, helping, **administering**, and various kinds of tongues.



## Let us pray.

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Creator and Sustainer,

We give you thanks and praise for all you have provided. We recognize that everything we do belongs to you. You are our ministry, your Spirit is in our people, and your glory is in our programs, finances, impact and future. We acknowledge that you have provided all that we have, and that it is enough.

During these times that challenge our faith and hope in each other, give us clean hearts in spite of ingratitude, courage and conscious integrity when faced with scary encounters, and a soul that is open to seeing good sprouting and flourishing around us.

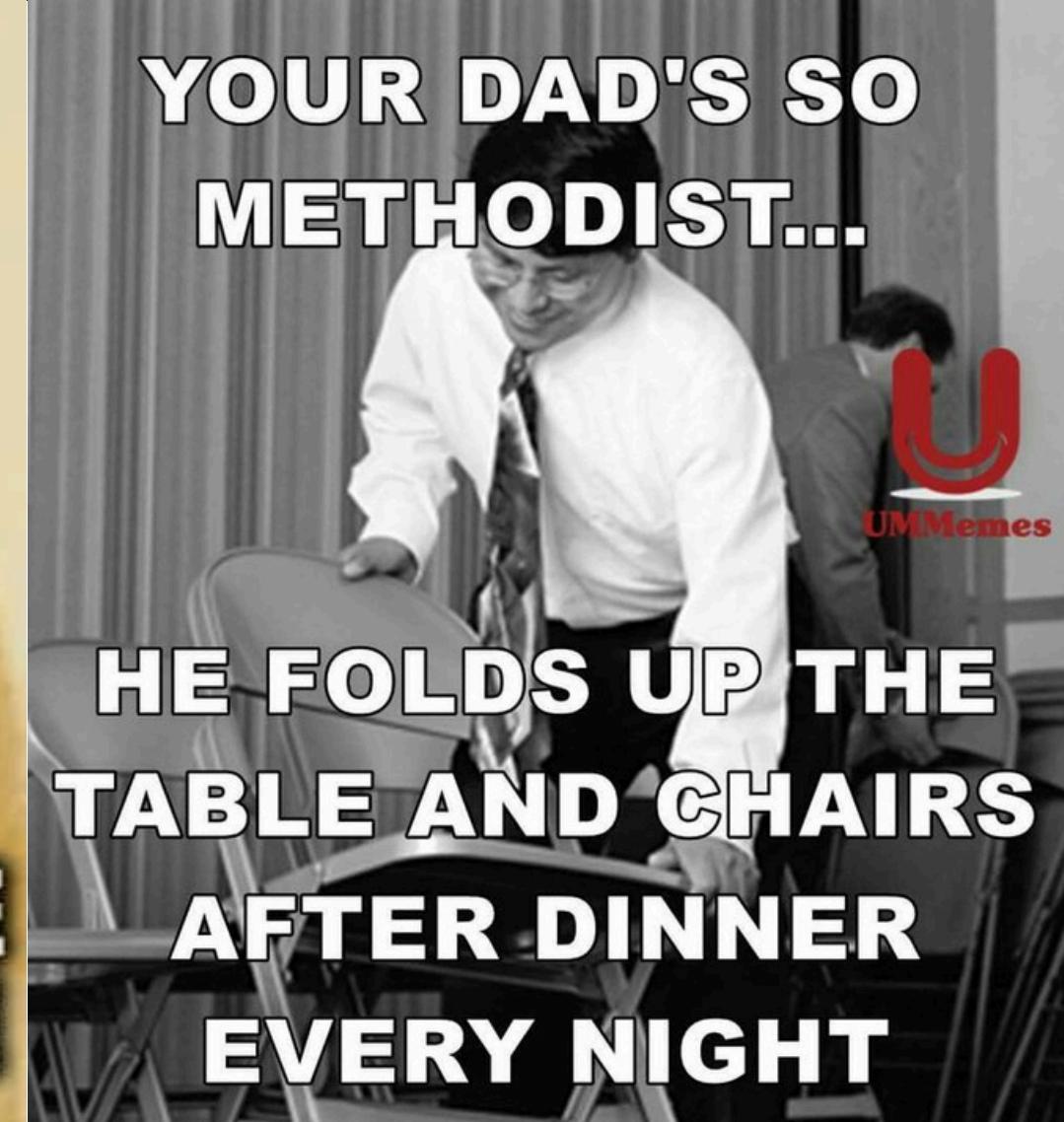
O God, by your grace alone we are accepted and called to your service. Strengthen us in the calling to administer and order the churches in our care.

Through Jesus Christ our Lord, who is alive and at your side, and the Holy Spirit, now and forever.

Amen.

Methodists are known throughout history for

Potlucks, Committees, and Charge Conferences

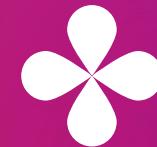


# what are Charge Conferences? and WHY????

More than one  
answer!

¶¶246 - 251  
**Book of Discipline**  
2020|2024 (p 175-  
184)

**Charge Conference  
forms are the  
official annual  
reports of your  
church.**



the connecting link  
between the local  
church and the  
denomination

oversees the work  
of your church  
council or  
leadership team &  
sets the  
organizational plan  
of the church

annual meeting of  
your church  
corporation - an  
official business  
meeting of your  
church

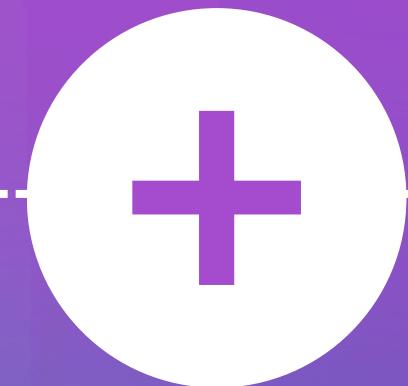
review and  
evaluate the total  
mission and  
ministry of the  
church

# a note about retention

06

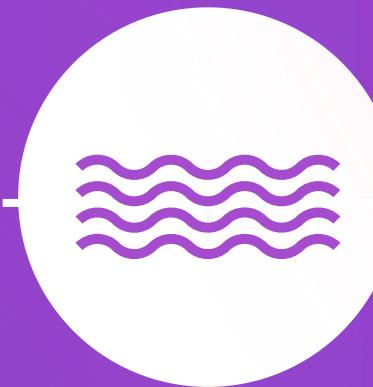
how long does my church need to keep these forms and reports around?

## FOREVER.



### Digitalization

You can switch to digital storage, for former and current records. Best practices include regular off-site backups of all files and data.



### Liability & Insurance

Things happen that we cannot predict. Information in your charge conference documents could help protect future generations of your congregation and the annual conference.



### If your church closes

The ministry of your church, including its membership and baptisms, are recorded in your various charge conference forms. If your church closes, all charge conference forms and documents should be transferred to the Cal-Pac Archives.

CLERGY BENEFITS & BILLING

CONFERENCE ORG REQUEST

LEGAL DOCUMENTATION

DENOMINATIONAL REQUIREMENT

DISTRICT SUPERINTENDENT NEEDS IT

# where to find the forms and other resources

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[www.calpacumc.org/chargeconference](http://www.calpacumc.org/chargeconference)

01.

the web page

**Community Support Space**

- Join our new community space where we'll have a chat to get answers to your questions! [Sign up at this link.](#)

02.

the forms and  
resource links

03.

the OneDrive  
download

04.

Appendix A  
Charge  
Conference  
Overview

- [App A Charge Conference Overview \(.doc\) \(OneDrive link here\)](#)

3. The full list of documents, forms, and files can be accessed in a [OneDrive folder at this link.](#)



# what are the forms?

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## Charge Conference Forms

- 1. Annual Composite Report of the Trustees ^
- 2. Annual Report of the Committee on Finance ^
- 3. Clergy or LPA Salary & Benefits Compensation Report ^
- 4. Annual Report on Church Staffing ^
- 5. SPRC Appointment Request & Pastoral Evaluation ^
- 6. Abuse Prevention Policy Verification ^
- 7. Annual Report of the Pastor
- 8. Clergy Appointment Request
- 9. Membership Audit ^
- 10. Post-Charge Conference Recap

## Special Categories of Clergy & Laity

- 11. Clergy on Leave of Absence
- 12. Deacon (not in extension ministry) ^
- 13. Clergy Appointed to Extension Ministry
- 14. Certified Lay Servants & Certified Lay Speakers (or applicants for) ^
- 15. Certified Lay Ministers (or applicants for) ^
- 16. Declaration of Candidacy for Licensed or Ordained Ministry
- 17. Annual Report of Candidate for Ministry
- 18. Clergy on Honorable or Administrative Location
- 19. Retired Clergy Elder or Deacon

Reports marked with ^ have had changes. There were a lot of changes.

## Other Annual Reports

These reports are required, but may need to be completed on a schedule not aligned with charge conference:

- a. Leadership Roles in the Local Church (Feb 1)
- b. United Women in Faith Membership Report (Feb 1)
- c. Fund Balance / Audit Report ^ (Mar 1)
- d. Certification of Payment for Clergy and LPAs ^ (Feb 1)

# how to fill out a form and sign it (general process)

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**The timing differs form to form. Read carefully.**

**Any signer can now download an unsigned form as a draft. But the form is NOT considered complete until the online signature is finished. You cannot sign in ink and file it, because then only the church will have a copy.**

**01.**

Open the form and review requirements. Print / download the worksheet if you will need it, to help you prepare.

**02.**

Gather answers to all questions. When ready, return to the form and answer each question carefully.

**03.**

On the review page, review all answers to be sure they are correct. You might use Save & Resume for other team members to review as well.

**04.**

Click Submit. Wait for attachments to upload and get confirmation of submission.

**05.**

Notify first signer, if signatures are required. Each signer should notify the subsequent signer after submitting a signature.

**06.**

After all signatures are complete, the completed form is delivered to recipients per the distribution list.

# WHAT CHANGED????

FORMSTACK NOW  
HAS TABLES!!!!

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- ✓ **1. Trustees:** Addition of a section on carbon net neutrality, per Book of Discipline changes.
- ✓ **2. Finance:** Report to your charge conference any billing delinquencies more than 60 days past due.
- ✓ **3. Salary & Benefits:** Look for changes in retirement billing by the Conference to the church, as Wespath is transitioning from CRSP to Compass as of January 1, 2026. Additional changes are expected for the salary & benefits form for Lay Persons Assigned, which is still in legal review as of September 23. (More information about Compass at <https://www.calpacumc.org/resource/recording-intro-to-compass/>)
- ✓ **4. Church Staffing:** No need to make a spreadsheet and upload it this year!
- ✓ **6. Abuse Prevention Policy:** **Have you transitioned to Ministry Safe? The questions are changed. Churches still operating under Safe Gatherings may need to work with conference or district staff this year to maintain your insurance coverage.**
- ✓ **9. Membership Audit:** The questions on this form now align with the statistical Table 1. If you complete this form as of December 31 (per the instructions), it will help you answer Table 1 Question 2.
- ✓ **d. Certification of Payment:** The questions on this form now align with statistical Table 2 Supplement. If you complete this form in January (per the instructions), it will help you answer Table 2 Supplement questions. Or, if you've completed Table 2 Supplement, you will have the answers to this report.



# let's practice

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#6 Abuse Prevention Policy (signature required)

#3 Salary & Benefits for a Clergy Member (signature required)

FORMSTACK  
NOW HAS  
TABLES!!!!

More information about Compass at

<https://www.calpacumc.org/resource/recording-intro-to-compass/>

FORMSTACK NOW  
HAS TABLES!!!!

Your Requests



JENNIFER IS  
EXCITED ABOUT  
THE TABLES!

FORMSTACK NOW  
HAS TABLES!!!!

# Frequently Asked Questions

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## **Q: Our signer / leader doesn't do email or doesn't get the signature requests**

Signing can be facilitated by the pastor or in the church office.

Suggestions include:

- Use the church office email for the signer, and have the leader come into the office or meet the pastor to sign.
- The district office & Jennifer can facilitate signing on a mobile device via text message if needed.
- The district office & Jennifer can send the pastor or church office a dedicated unique URL for the leader to sign.



## **Q: I didn't get the signature request email. What do I do?**

This does happen.

Try these steps:

- Be sure it is your turn in the route to sign. The pastor usually goes last.
- Check all Spam, Junk, Clutter, Social, and other folders for the missing email. Your email provider may be filtering your email to 'help' you.
- Email your district office or Jennifer & team at [dataservices@calpacumc.org](mailto:dataservices@calpacumc.org) for help. We can re-send the email, provide you with a text message to your mobile device, or send you a dedicated, unique URL to sign.



# Frequently Asked Questions

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**Q: I lost or didn't get the Save & Resume URL, or my 30 day limit passed. Do I have to start over?**

Maybe or maybe not. It depends.

For forms #5 and #8 that include supervisory or confidential information, you will have to start over.

For most other forms, we may be able to reconstruct or provide you with the answers that were entered prior to the Save & Resume point. But you may have to re-type it.

Best practice is to use the worksheet to make a list of your answers - especially long ones - before you enter any information in the online portal.



**Q: My form expired in the signature process? Can we revive it without re-typing everything?**

You had 45 days to sign it! That's a few days past 6 weeks!

The answer is yes. Do not re-type it!

Both your district office and Jennifer & team can re-start the signature process without anyone filling out the form again.

Don't panic.



**DID WE MENTION THE NEW TABLE FEATURE IN FORMSTACK?**

# Frequently Asked Questions

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## **Q: I keep getting signature reminders for a form I've already signed? What's going on?**

There are two possible reasons this is happening:

1. It's possible that multiple versions of the same form have been submitted, and so you are being asked to sign a duplicate of a form you've already signed, because more than one is in the system.
2. A signer after you in the signature routing may have declined to sign and the form has been re-submitted with changes or corrections, so you are being asked to sign a new version of the form.

You can use the Decline Document function or email your district office or Jennifer & team to help end the unnecessary repeat.



## **Q: Our church needs to apply for Equitable Compensation. Where is the application?**

The Equitable Compensation application this year is moving to Formstack!

It is no longer an Excel file and a pile of supporting documents.

If you are eligible for Equitable Compensation, you can get the link from the district office. It is not published online.



# Your Questions???



# Remember, your work is important to the church.

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A flourishing church administration is crucial to the success of your church's mission and ministry. We know things go badly when administrators aren't successful in their ministry. We value (and cherish) your excellent work.

Without a properly functioning administrative back-end to church operations, your church risks

- staff frustration & ultimately turnover
- potluck fails without plates or lemonade
- missing documentation & preparation for missional programs
- lawsuits
- financial mismanagement
- more expensive repairs and building costs
- higher expenses than absolutely necessary
- its future and present mission and ministry work
- unhappy members who go elsewhere



## Thank you for your ministry.

# For additional assistance

(WILL YOU  
REMEMBER THERE  
IS A NEW TABLE  
FEATURE IN  
FORMSTACK?)



1. Visit <http://www.calpacumc.org/chargeconference>
2. Join the Cal-Pac Mighty Network to connect with staff and others who are also deep in charge conference preparation. Let's build a network that utilizes our collective knowledge and experience together.
3. Ask your District Office at
  - a. East District (Dany): [eastdistrict@calpacumc.org](mailto:eastdistrict@calpacumc.org)
  - b. Hawaii District (Sonya): [hawaiidistrict@calpacumc.org](mailto:hawaiidistrict@calpacumc.org)
  - c. North District (Jan): [northdistrict@calpacumc.org](mailto:northdistrict@calpacumc.org)
  - d. South District (Emilie): [southdistrict@calpacumc.org](mailto:southdistrict@calpacumc.org)
  - e. West District (Polly): [westdistrict@calpacumc.org](mailto:westdistrict@calpacumc.org)
4. Contact Jennifer & team at [dataservices@calpacumc.org](mailto:dataservices@calpacumc.org) or [jgaylord@calpacumc.org](mailto:jgaylord@calpacumc.org).
5. Come back to the Learning Lab! There are four Sessions, and recordings to re-watch after those are completed.
6. For more information about Compass retirement changes, go to <https://www.calpacumc.org/resource/recording-intro-to-compass/>