

CALIFORNIA-PACIFIC CONFERENCE

WWW.CALPACUMC.ORG/CHARGECONFERENCE

CHARGE CONFERENCE FORMS

October 6, 2026
October 20, 2026

Presented by:
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dataservices@calpacumc.org



California-Pacific Conference
The United Methodist Church

TODAY'S ACTION PLAN



JENNIFER GAYLORD



- **ABOUT ME**

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, event registrations and payments, and charge conference forms. I like the color purple, dogs, and all of you.

- **DISTRICT SUPERINTENDENTS & ADMINISTRATIVE ASSISTANTS**

East District: Rev. Moonyoung Lee, Superintendent
Dany Caguin, Administrative Assistant

Hawaii District: Rev. Thomas Choi, Superintendent
Sonya Lee, Administrative Assistant

North District: Rev. Garth Gilliam, Superintendent
Jan Newton, Administrative Assistant

South District: Rev. Luis Garcia, Superintendent
Patricia Perez, Administrative Assistant

West District: Rev. Dr. Siosaia (Saia) Tu'itahi, Superintendent
Polly Sablan, Administrative Assistant

***Whatever you do, in word or deed, do everything in the name of the Lord Jesus, giving thanks to God the Father through him.
(Colossians 3:17)***

***My beloved siblings, be steadfast, immovable, always abounding in the work of the Lord, knowing that in the Lord your labor is not in vain.
(1 Corinthians 15:58)***

LET US PRAY

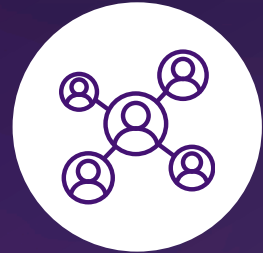
You are our Creator and Sustainer.

You are the real worker in our churches. We are so grateful that You are the reason for our work together. We work in the shade and sunshine of You, and we do Your work because You are working through us. Whether we are resting or are busy in Your name, You are working to bring us into Your Kin-dom.

Holy Spirit, in Your wisdom You have placed Your trust in us to carry out duties and responsibilities in Your name. We do Your work, knowing that we may not ever see the fruit that is born from it, but so that Your Spirit is the seed of that fruit, which will blossom and provide a life-giving future in a time of Your choosing.

Amen.

WHAT? WHY?



GOVERNANCE

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



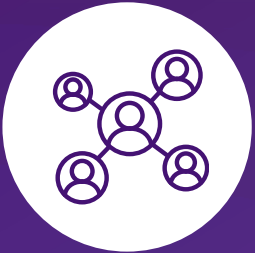
CONNECTION

The charge conference is the connecting link between the local church, the conference, and the denomination



STRATEGIZE THE FUTURE

The charge conference is responsible for evaluating and reviewing the total mission and ministry of your church.



ANNUAL DUTIES

The charge conference is the annual meeting of your church corporation and is an official business meeting of your church required to keep your corporation in good standing.

We hold annual charge conferences for several reasons.

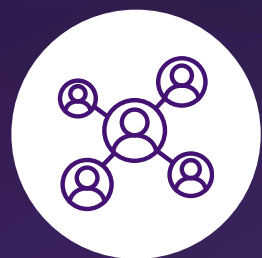
For more from The United Methodist Church about charge conferences, read ¶¶246 - 251 in the Book of Discipline 2020/2024 (pages 175-184).

Charge conference “forms” are the official annual reports of your church. When they are combined together, they represent your annual corporate report.

Why are we being asked for all this information?

- Legal Documentation (statute of limitations in California is essentially forever)
- Liability & Insurance
- Denomination Requirements
- Conference Organization Requests Information
- Clergy Benefits & Billing

KEEP HOW LONG? FOREVER.



CHURCH HISTORY

Your charge conference forms over time are a valuable record of your church's mission and ministry through the decades. They also are a treasure trove and a time capsule that you make every year. Give them the love they deserve.



DIGITIZATION

You can switch to digital storage of documents, including old records. Best practice is to create & maintain regular off-site backups of all essential documents.

If your church ever closes, all of your charge conference records and essential documents should be moved to the Conference Archives.



ANNUAL DUTIES

The charge conference is the annual meeting of your church corporation and is an official business meeting of your church required to keep your corporation in good standing.



LIABILITY & INSURANCE

We can't predict the future, or know what will happen decades from now. Information in your charge conference documents could help protect generations of your congregation and the annual conference.

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TOUR

THE WEB PAGE AT
WWW.CALPACUMC.ORG/
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THE ONE DRIVE DOWNLOAD

- [Appendix e Compass Enrollment Change Instructions](#)
- [Appendix f GCFA Tax Packet](#)
- [Appendix g Clergy IRS Housing Allowance Explained](#)

Other Resources

- [Download all forms and links here](#)
- [Abuse & Harassment Prevention Resources](#)

[Districts](#)[Churches](#)



California-Pacific Conference
The United Methodist Church

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ANNUAL CONFERENCE

[Home](#) [Our Conference](#) [Statistics](#) [Charge Conference Forms](#)

Charge Conference Forms

Charge Conference forms for 2026-2027 are in development and will be published throughout September. Training will start in October, and registration is now open:

- General Training: Tuesday, October 6, 7 pm PDT (4 pm HST)
- Salary & Benefits Forms: Tuesday, October 13, 1 pm PDT (10 am HST)
- Trustees' Reports & Disaster Response Plans: Thursday, October 15, 7 pm PDT (4 pm HST)
- General Training: Tuesday, October 20, 7 pm PDT (4 pm HST)

ALL trainings will be recorded and made available at www.calpacumc.org/chargeconference

REGISTER FOR TRAINING

Note: Forms will be published throughout the month of September.

2026-2027 Forms

0 [Instructions in PDF](#) | [Instructions in Word](#)

CHURCH & ACTIVE CLERGY FORMS

1 [Annual Report of the Trustees](#)

- [Worksheet in PDF](#) | [Worksheet in Word](#)
- [Accessibility Audit Worksheet in PDF](#)

Appendices

- [Appendix a Salary & Benefits Guidelines 2027](#)
- [Appendix b Minimum Compensation Standards 2027](#)
- [Appendix c California Health Insurance Rates 2027 \(Oct 2026\)](#)
- [Appendix d Hawaii Health Insurance Rates 2027](#)
- [Appendix e Compass Enrollment Change Instructions](#)
- [Appendix f GCFA Tax Packet](#)
- [Appendix g Clergy IRS Housing Allowance Explained](#)

Other Resources

HOW TO FILL OUT A FORM

**1. PREPARE
WORKSHEET
CHECK TIMING**

**2. COMPLETE
FORM ONLINE**

**3. REVIEW ANSWERS
& SUBMIT.**

**4. COLLECT
SIGNATURES AS
NEEDED**

**5. DELIVERY OF
SIGNED DOCUMENT**

**TIMING DIFFERS FOR
EACH FORM. READ
INSTRUCTIONS
CAREFULLY.**

Any signer can 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.

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LET'S PRACTICE

CCF#4 Church Staffing
– completion and signing process

CCF#3 Salary & Benefits
– completion and signing process

LET'S PRACTICE

CCF#4 Church Staffing

REPORT YEAR	2026-2027				
ABOUT THE LOCAL CHURCH					
A. DISTRICT	North				
B. LOCAL CHURCH	North District Office				
C. SPRC CHAIR	Jennifer Testing				
D. SPRC CHAIR EMAIL	jgaylord@calpacumc.org				
E. CHURCH BENEFITS ADMINISTRATOR	Sonya HawaiiTest				
F. CHURCH BENEFITS ADMINISTRATOR EMAIL	hawaiidistrict@calpacumc.org				
G. PASTOR-IN-CHARGE	Dany EastTest				
H. PASTOR-IN-CHARGE EMAIL	eastdistrict@calpacumc.org				
I. CHURCH OFFICE EMAIL	southdistrict@calpacumc.org				
In the context of your local ministry setting, please answer the following questions.					
- Preschool employees should be included in your reporting if the preschool is incorporated with the church. If the preschool is a separate entity, do not include this staff in your report. - For Type: - Clergy = appointed by the bishop - Lay = assigned by the bishop as a Lay Person Assigned or otherwise hired by the local church - If your charge has more than 45 employees, please contact Data Services at dataservices@calpacumc.org before completing the form.					
i. EMPLOYMENT CLASSIFICATIONS					
1. HOW MANY HOURS PER WEEK CONSTITUTES FULL-TIME EMPLOYMENT FOR LAY STAFF? Individuals working this many hours per week or more are full-time. Individuals working less than this many hours per week are considered part-time.				35	
2. HOW MANY HOURS PER WEEK CONSTITUTES PART-TIME EMPLOYMENT FOR LAY STAFF?				Choose all that apply: 1-9 HOURS, 10-19 HOURS, 20-29 HOURS, 30-34 HOURS, 35-39 HOURS.	
3. DOES YOUR CHURCH HAVE ADDITIONAL CLASSIFICATIONS FOR LAY STAFF, OTHER THAN FULL-TIME OR PART-TIME? IF SO, PLEASE LIST HERE. If no other classifications, enter None. Examples may include temporary, seasonal, etc.				Seasonal (Christmas tree lot workers)	
ii. CURRENT EMPLOYEES					
4. HOW MANY UNIQUE EMPLOYEES DO YOU HAVE? Include appointed clergy.				5	
5. In the question below, list each employee position by name, title, benefits eligibility, type, and classification. If you are listing more than 45 employees, contact Data Services at dataservices@calpacumc.org before starting the online form.					
	EMPLOYEE NAME (Last, First)	POSITION TITLE	ELIGIBLE FOR BENEFITS?	POSITION TYPE	POSITION CLASSIFICATION
5.01.	EastTest, Dany	Pastor	YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.02.	SouthTest, Patty	Church Administrator	YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.03.	Wesley, Charles	Organist / Music Director	YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.04.	Gehry, Frank	Building Engineer	YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.05.	BenefitsAdmin, Wanda	Young People Director / Sunday School Superintendent	YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.06.			YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.07.			YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.
5.08.			YES or NO.	Choose CLERGY or LAY.	Choose FULL-TIME, PART-TIME, OTHER.

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DEEP BREATHING. 5 MIN BREAK.

**HAVE A DRINK
OF WATER.**

**YOU CAN DO
THIS.**

A well-functioning church administration is critical to a church's success in its mission and ministry.

The church cannot be its full and missional self without the excellent work you do.

WITHOUT YOUR GOOD WORK
members leave
staff turnover
missional programming fails

**FINANCIAL
MISMANAGEMENT**

LAWSUITS

**MORE EXPENSIVE
BUILDING COSTS &
REPAIRS**

**YOUR ADMINISTRATIVE WORK IS
FUNDAMENTAL TO THE LIFE OF THE CHURCH.**

LET'S PRACTICE

CCF#3 Salary & Benefits

Timing

Before the charge conference, send your worksheet to the district offices.

Complete this online AFTER your charge conference has voted it and approved it.

2027 Minimum Salary Schedule FM (Elders & Deacons in Full Connection) Using MCS rules from the 2015 Annual Conference				
	Year	Percent of MCS	Salary	Year
7	11	86%	\$64,225	21
4	12	87%	\$64,972	22
0	13	88%	\$65,718	23
7	14	89%	\$66,465	24



CCF#3a PASTOR COMPENSATION PACKAGE WORKSHEET (SINGLE CHARGE)

A. Pastor Name	Sonya HawaiiTest	F. Is Pastor Appointed while Retired (AR)?	No
B. Church Name	Hawaii District Office	G. Is Pastor Waiving Any Benefits?	No
C. Position Title	TestPastor	H. Minimum Compensation Schedule	FM
D. Comp Start Date	1/1/2026	I. Year on Schedule for this start date	12
E. Appt %	Full-time (100%)	J. Required Minimum Cash Salary Line a	64,972.00

CASH SALARY & ALLOWANCES

ALLOWANCES (paid without receipt)	
a. Cash Salary (not tax-adjusted)	68,000.00
b. Hawaii District Geographic Variant	1,200.00
c. Additional Salary in lieu of health insurance	0.00
d. Other Allowances (taxable)	3,750.00
ADJUSTED SALARY (Salary + Allowances)	72,950.00

REIMBURSABLES or PAID DIRECTLY TO VENDOR	
e. Other Reimbursables & Direct Payments	1,500.00

This non-taxable amount is not included in the Adjusted Salary or Plan Compensation.

HOUSING

f0. Does this pastor live in a parsonage?	No
f1. Housing & Utilities Allowance	40,000.00
f2. Parsonage Value (35% of Adjusted Salary)	0.00

Enter Yes or No
See notes to right. Enter housing allowance + utilities allowance.

PLAN COMPENSATION (a + b + c + d + f1 + f2)	
PLAN COMPENSATION	112,950.00

Used to calculate pension contributions & CPP premiums

BENEFITS (Church Portion of Total Cost)

g0. Is the pastor waiving health insurance?	No
g1. Health Insurance (conference plans)	12,348.63
g2. Dental insurance (conference plans)	439.68
h1. Health Insurance (church plans)	0.00
h2. Vision Insurance (church plans)	0.00
h3. Dental insurance (church plans)	0.00
i. Comprehensive Protection Plan premiums	3,501.45
j. What is the pastor's Compass status?	Enroll
j1. Compass Retirement Fixed Contribution	1,800.00
j2. Compass Retirement Percentage Expense	10,165.50

Enter Yes, No, or Not Eligible

Carrier	
Carrier	
Carrier	

3.1% of Plan Compensation for 3/4 (75%) and full-time clergy.
See notes to right.
\$1800 for full-time clergy, pro-rated for 3/4 and 1/2 time
9% of Plan Compensation for clergy serving 1/2 or more

TOTALS

ADJUSTED SALARY (Salary + Allowances)	72,950.00
Other Reimbursables & Direct Payments	1,500.00
Housing Sub-Total	40,000.00
PLAN COMPENSATION	112,950.00
Benefits Sub-Total	28,255.26
TOTAL SALARY & BENEFITS	142,705.26

Total Salary & Benefits =
Adjusted Salary + Other Reimbursables + Housing &
Utilities Allowance + Benefits (does not include Parsonage)

Some forms have been
renumbered. Be sure to
look through the entire list.

WHAT'S CHANGED?

CCF#1 ANNUAL REPORT OF THE TRUSTEES

This document has been changed to focus more on the long-term health and status of your entity: your assets, your property, your status as a corporation, and your future.

CCF#4 ANNUAL REPORT ON CHURCH STAFFING

This document has been changed to focus on the current employees of your church, to improve benefits coordination with the conference and denomination.

CCF#3 SALARY & BENEFITS FOR CLERGY & LPAS

This document has been changed to better align this report with tax requirements for clergy and with denominational guidelines.

CCF#6 ABUSE & SEXUAL HARASSMENT PREVENTION VERIFICATION

This document has been changed to better align with standards set by our insurance companies.

FAQS

I DIDN'T GET MY SAVE & RESUME URL, OR MY 30 DAY LIMIT HAS PASSED. DO I START OVER?

Maybe.

For SPRC forms #5 and #8, which include supervisory & confidential data about employees (clergy or LPAs), 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. You may need to re-type it, as those back-ups are in PDF format. (Or copy & paste.)

BEST PRACTICE: Use the worksheet to make a list of your answers - especially the long ones - before you copy & paste them into the online form. That way you have your answers.

MY FORM EXPIRED IN THE SIGNATURE PROCESS. DO I HAVE TO RE-TYPE IT?

You have 45 days to collect the signature, that's 6 weeks. Please don't wait that long to follow up on a missing form.

But the answer is no, you do not have to re-type it.

Both your district office and Data Services can re-start the signature process without anyone filling out the form again. Everyone will have to re-sign.

Don't panic.

BEST PRACTICE: When you first submit the form, contact the first signer (if it isn't you) to let them know to look in their inbox (or their spam/clutter/junk folders) for the signature request email. If it's lost or the email address was incorrect, go ahead and contact your district office or Data Services for assistance.

FAQS

SIGNATURE OR NOTIFICATION EMAIL ADDRESSES WERE ENTERED INCORRECTLY.

District Offices and Data Services can help you resolve this issue in several different ways:

1. We can re-direct a signature request to a text message with your permission and a valid mobile number.
2. We can fix the email addresses in the document and start the signature process again from the beginning. This works best if the error is in the first signer's email address.
3. We can re-direct the signature request to a different email address without updating the document itself. This works best if the error is in a second or third signer's email.

**I KEEP GETTING SIGNATURE
REQUESTS ON A FORM I'VE
ALREADY SIGNED. MAKE IT
STOP PLEASE.**

There are two possible reasons this is happening.

1. A signer after you in the routing process may have found that corrections were needed and re-submitted the form. You are being asked to sign a new version of the form. Check with the other signers to see if this has happened before declining.
2. Multiple versions of the same form have been submitted by your church, so you are being asked to signed more than one time (one for each form). In this case, if you are certain, you can click "Decline" in the lower right on the signature page to stop further notifications.

You can always contact your district office or Data Services to resolve multiple requests on your behalf.

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FOR ADDITIONAL HELP

EAST DISTRICT

eastdistrict@calpacumc.org
(909) 984-7100

HAWAII DISTRICT

hawaiidistrict@calpacumc.org
(808) 536-1864

NORTH DISTRICT

northdistrict@calpacumc.org
(818) 882-8005

DISTRICT OFFICES

WEST DISTRICT

westdistrict@calpacumc.org
(562) 429-1441

SOUTH DISTRICT

southdistrict@calpacumc.org
(619) 239-9980

COME BACK!

Come back for more training!

Tuesday October 13 1:00 PM
(10:00 AM Hawaii)
Salary & Benefit Forms

Thursday October 15 7:00 PM
(4:00 PM Hawaii)
Trustees & Disaster Response
Plans

Tuesday October 20 7:00 PM
(4:00 PM Hawaii)
This training again.

DATA SERVICES

dataservices@calpacumc.org
(626) 568-7363

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YOUR QUESTIONS

Thank you for participating in this joyful process of reviewing the mission and ministry of your congregation.