



2025 Church Conference Forms Checklist

Submission Process:

Before the Church Conference: *due 7 days before the Church Conference*

- a. **Complete and save each form in the Church Dashboard** (Make sure all attachments are uploaded if the form requires them. Example: Report of the Trustees).
 - b. After the forms are saved, they will become accessible for the District Superintendent's review.
2. **After the Church Conference:** *due 7 days after the Church Conference*
- a. **Complete & save remaining reports** (e.g., Minutes, Clergy Compensation, any missing reports).
3. **After completing and saving all the forms**, the “Officially Submit” button will become visible at the bottom of the page, allowing you to sign and submit them to the District Office.

For Questions and Support:

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Forms Due 7 Days Before the Church Conference:

These forms must be printed and available for the voting members of the Church Conference.

	Church Conference Form	Who is responsible for submitting this form?	Where is the form found?
	Report of the Pastor	Clergy	Church Dashboard
	Report of Additional Appointed Clergy (<i>if applies</i>)	Clergy	Church Dashboard

	Report of Clergy in Extension Ministry, Retired Clergy, or in Honorable Location (<i>if applies</i>)	Clergy	Church Dashboard
	Membership Report	Clergy, Membership Chair	Church Dashboard
	Nominations Report	Clergy	Church Dashboard
	Profile of the Local Church	SPRC Chair	Church Dashboard
	Recommendations Report of the Charge Conference (<i>if applies</i>)	SPRC Chair	Church Dashboard
	Report of the Finance Committee & Financial Summary	Finance Team	Church Dashboard
	2026 Budget	Finance Team	Church Dashboard
	Report of the Trustees	Trustees Chair	Church Dashboard
	Accessibility Report	Trustees Chair	Church Dashboard
	Safe Sanctuaries® Report	Trustees Chair	Church Dashboard
	Parsonage Report (<i>if applies; one report for each church-owned parsonage is required</i>)	Trustees Chair	Church Dashboard

Forms Due 7 Days After the Church Conference:

	Church Conference Form	Who is responsible for submitting this form?	Where is the form found?
	Charge Conference Minutes	Church Administrator	Church Dashboard

2025 Church Conference Reports Instructions

Report of the Pastor (due one week before the CC)

Please use the following heading and content for your report.

HEADING: 2025 Report of the Pastor, Pastor's Name, Church Name (City: Church Name)

CONTENT: The Pastor shall give a report on the state of the church and an account of pastoral ministry as it relates to (para. 340): providing support, guidance, and training to the lay membership in the church; ministering within the congregation and to the world; and administering the temporal affairs of the congregation. Include as a part of the report a statement outlining the pastor's program of continuing education and spiritual growth for the past year and plans for the year to come (para. 350.1).

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

If you come back to upload a new version, first click the trash can icon next to the file name to remove the prior version, then upload the new version.

Report(s) of Additional Appointed Clergy to the Church (due one week before the CC) If there is only one appointed clergy to your church, you may disregard this report.

All clergy appointed to a local church are required to submit an annual Report to the Charge Conference. The lead Pastor will submit the *Report of the Pastor*; any others will submit their annual Report(s) here.

Please use the following heading and content for your report.

HEADING: 2025 Additional Appointed Staff Report, Appointed Person's Name, Church Name (City: Church Name)

CONTENT: For churches where there is more than one clergy or staff person who is appointed to serve the church by the Bishop, each appointed person not serving as the lead pastor will give an account of pastoral ministry as it relates to (para. 340): providing support, guidance, and training to the lay membership in the church; ministering within the congregation and to the world; and administering the temporal affairs of the congregation. Include as a part of the report a statement outlining the pastor's program of continuing education and spiritual growth for the past year and plans for the year to come (para. 350.1).

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

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Reports of Clergy in Extension Ministry, Retired, Honorable Location (due one week before the CC) If there are no NIC United Methodist clergy related to your church in these categories, you may disregard this report. All NIC United Methodist Clergy in Extension Ministry, Retired Clergy (*not under appointment*), and Clergy in Honorable Location must submit an annual report to their Charge Conference.

Please use the following heading and content for your report.

HEADING: 2025 Clergy in Extension Ministry Annual Report, Appointed Person's Name, Church Name (City: Church Name)

CONTENT: Clergy appointed to Extension Ministries (para. 344) "shall establish membership in a church/charge conference in their home annual conference....They shall submit to their home church/charge conference an annual report of pastoral duties and the fulfillment of their licensing or ordination through their special appointment, including ministerial activities in the church/charge where they have an affiliate membership relation and in other units of the Church at large, as well as continuing formation experiences completed and anticipated." (para. 344.3a)

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

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Membership Report (due one week before the CC)

The Pastor with the assistance of the Membership Secretary shall include the names of all persons involved in the changes in membership outlined in The 2020/2024 Book of Discipline (para. 231, 234).

Nominations Report (due one week before the CC)

Please use the following heading and content for your report.

HEADING: 2025 Nominations Report, Pastor's Name, Church Name (City: Church Name)

CONTENT: The 2025 Nominations Report is a complete listing of persons who are recommended and elected to serve in the local church for the 2026 calendar year, including specific officers such as the Lay Leader and Church Treasurer, lists of all team/committee members, optional committees (such as a lay personnel committee or an investment committee), members at large of Church Council or other committees, and additional leaders for specific ministries of the

congregation. If possible, please include the email addresses for your Committee/Team Chairs, as well as your Lay Members and Alternate Lay Members to Annual Conference.

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

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Profile of the Local Church (due one week before the CC)

The Profile of the Local Church is to be completed by the Staff/Pastor-Parish Relations Committee annually. It will be on file with the District Superintendent to expedite the appointment process, if and when necessary.

Recommendations of the Charge Conference (due one week before the CC)

If there are no members in these categories, you may disregard this report.

The Recommendations Report is simply the list of members who are required to receive the recommendation of the CC at this Charge Conference. This includes Candidates for Ordained Ministry (first-time candidates para. 310.1e & continuing candidates para.131.1); Lay Servants, Lay Speakers, and Lay Ministers (para. 247.11, 266-269); and Candidates for Church-related vocations (para. 247.11).

Report of the Finance Committee & Financial Summary (due one week before the CC) The annual report of the Finance Committee shall include the **Report of the Finance Committee form, as well as a Financial Summary** (simply, a copy of the church's most recent financial report to the Finance Committee.)

Report of the Finance Committee

Download the [Report of the Finance Committee](#) Form. This is a fillable pdf - download in Adobe & save the form to your computer, enter your answers and save as you go along.

Financial Summary *Please use the following heading and content for your report.*

HEADING: 2025 Financial Summary, Church Name (City: Church Name)

CONTENT: The Financial Summary is intended to give a current "snapshot" of the church's financial situation. Please attach the church's most recent financial quarterly statement that demonstrates expenses and revenues.

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

If you come back to upload a new version, first click the trash can icon next to the file name to remove the prior version, then upload the new version.

2026 Budget (due one week before the CC)

The proposed 2026 Budget to be considered for vote at the Charge Conference.

Please use the following heading and content for your report.

HEADING: 2026 Budget, Pastor's Name, Church Name (City: Church Name)

CONTENT: The proposed 2026 Budget to be considered for vote at the Church/Charge Conference.

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

If you come back to upload a new version, first click the trash can icon next to the file name to remove the prior version, then upload the new version.

Trustees Report (due one week before the CC)

Download the [Report of the Trustees](#) Form.

This is a fillable pdf - download & save the form to your computer, enter your answers and save as you go along.

When you have completed the form, return here to attach the form.

SUBMIT: Please use the "Attach File" button below to upload your report. Click on Attach file, choose the file from your computer, then click "OK."

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Accessibility Report (due one week before the CC)

Para. 2533.6 of The Book of Discipline 2020/2024 states “*The board of trustees shall conduct or cause to be conducted an annual accessibility audit of their building, grounds, and facilities to discover and identify what physical, architectural, and communication barriers exist that impede the full participation of persons with disabilities and shall make plans and determine priorities of the elimination of all such barriers. It is highly encouraged that members of the congregation or from the community who have disabilities, who are family members of persons with disabilities, and who are builders or architects or rehabilitation professionals be involved in conducting the audit. The Accessibility Audit for churches shall be used in filling out the annual church and/or charge conference reports.*”

The 2025 Accessibility Audit is not an all-inclusive listing of ADA guidelines or appropriate accommodations, but rather represents basic first steps that a church may take to begin to implement accessibility measures. Resources are available through the Disability Ministry Committee of the UMC at umcdmc.org to help you plan and carry out improvements.

Parsonage Report (due one week before the CC) If the church does not own a parsonage, please disregard this report. "The chairperson of the board of trustees or the chairperson of the parsonage committee, if one exists, the chairperson of the committee on pastor-parish relations, and the pastor shall make an annual review of the church-owned parsonage to ensure proper maintenance." (para. 2533.4)

A parsonage report must be submitted for each parsonage that is owned by the church. (You may start a new Parsonage Report for each parsonage owned.)

Safe Sanctuaries® Report (due one week before the CC)

2024 Journal of the Northern Illinois Conference of The United Methodist Church, Standing Rules p. 251 states "Safe Sanctuaries for Children 1. Each Local Church shall have in place policies and procedures to protect children and youth from abuse, neglect, and sexual misconduct following the Safe Sanctuaries resource booklet. 2. Each Local Church shall submit their policies and procedures to the District Office by their regularly scheduled Charge Conference."

The conference insurance company requires all pastors, employees and volunteers involved with children, youths and vulnerable adults to complete a background check and Safe Sanctuaries® (or its equivalent) training. (see [Episcopal Letter](#), dated April 8, 2022).

Charge Conference Minutes (due one week after the CC)

"The charge conference recording secretary shall keep an accurate record of the proceedings and shall be the custodian of all records and reports and, with the presiding officer, shall sign the minutes. A copy of the minutes shall be provided for the district superintendent, and a permanent copy shall be retained for the church files. When there is only one local church on a charge, the secretary of the church council shall be the secretary of the charge conference. When there is more than one church on a charge, one of the secretaries of the church councils shall be elected by the charge conference to serve as its secretary." (para. 247.4)

First, complete the Charge Conference Minutes form questions relating to *Mission Statement for the Church* and *Personnel* before submitting the written minutes of the charge conference with the form.

Please use the following heading and content for the written minutes.

HEADING: 2025 Charge Conference Minutes, Church Name(s) (City: Church Name), Date & Time of the Charge Conference

CONTENT: The minutes are a written record of the proceedings and decisions made during the meeting. They are not a verbatim transcript, but rather a summary of the key points discussed and agreed upon. Items to include: the date and time of the Charge Conference, a list of attendees, a summary of the topics discussed, decisions made, action items assigned, and the time of adjournment.

SUBMIT: You may either copy/paste your content into the form, or click on Attach file, choose the file from your computer, then click "OK."

If you come back to upload a new version, first click the trash can icon next to the file name to remove the prior version, then upload the new version.