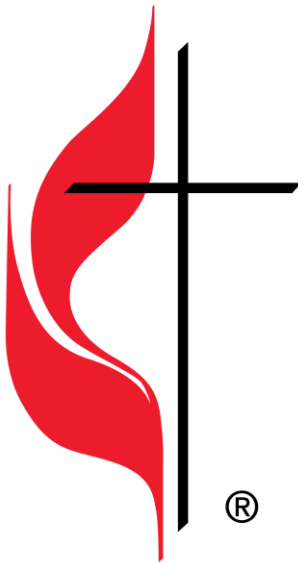


Annual Conference Secretary's Guide



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THE ANNUAL CONFERENCE SECRETARY

The Role of the Annual Conference Secretary

While the *Book of Discipline* does contain some specific statements about matters for which annual conference secretaries are responsible, these references are widely scattered through many disciplinary paragraphs. Even gathered together and read as a body, they do not present a complete picture of the varied tasks performed by conference secretaries.

Not only do the secretary's responsibilities range over a wide variety of tasks, they also vary significantly from conference to conference. Depending on such factors as where the secretary is located, the location and accessibility of the conference's computer facilities, the annual conference's staffing pattern, and the secretary's interests and available time, tasks which are performed by the secretary in one conference may be performed by other officers or conference staff members in another.

With these considerations in mind, the material which follows is in three sections:

1. Overview of responsibilities
 - a. Responsibilities in preparation for the annual conference session
 - b. Responsibilities during the conference session
 - c. Reporting annual conference actions
 - d. Editing the Annual Conference Journal
 - e. Ongoing responsibilities
2. Selected legislation pertaining to annual conference secretaries
 - a. Annual conference membership
 - b. The diaconal ministry
 - c. Local pastors
 - d. Orders, credentials, and the ordained ministry
 - e. Election of conference secretary
 - f. Conference business, records and archives, Journal
 - g. Miscellaneous provisions
 - h. Trials, judicial proceedings, decisions of law
3. Information needed by the General Council on Finance and Administration
 - a. Appointments of ordained clergy and local pastors (local churches, extension ministries and ABLC)
 - b. Appointments of diaconal ministers
 - c. Business of the Annual Conference (formerly DQ)
 - d. Annual Conference Journal (2 copies)
 - e. Officers' Sheets (provided by GCFA)
 - f. Clergy Membership

Timeline for Conference Secretary Work

Preparation for Annual Conference

(Preparation should begin several months prior to Annual Conference.)

- Collect and prepare reports, legislation, and resolutions for the Annual Conference Session
- Obtain list of charge lay members elected by charges in the Annual Conference
- Determine and notify lay equalization members according to the Annual Conference Rules for naming them.
- Distribute pre-conference materials to conference members, lay and clergy.
- Provide complete credentialing information needed for registration to Annual Conference
- Contact Assistant Secretaries and provide any needed instruction
- Contact Tellers and arrange for training

Annual Conference Session

(Immediately preceding and during Annual Conference)

- Work with Bishop to understand expectations of Conference Secretary in Business Sessions. (Examples: what motions are expected from the Conference Secretary – such as organization – setting the voting bar, consent calendar? Is Conference Secretary expected to make announcements? Participation in worship services, including memorial service, retirement service, ordination, etc.)
- Work with Program and Arrangements/Planning/Sessions Committee
- Credentialing and Registration (Roll Call and Attendance Reporting)
- Nominate Assistant Secretaries
- Daily Proceedings – (follow Conference Rules as to when and how these are approved and presented)
- Sending Greetings, sympathy, concern/courtesy
- Distribution of Materials
- Conference Nominations - Quadrennial and Annual, Class Structure
- Reports and Information for Conference Journal
- Organize/Supervise Annual Conference Committees such as Journal, Petitions & Resolutions, Courtesies, etc.
- Certificates presented during session – Ordination / Commissioning /Licensing, Retirement, Awards, etc. (Who orders these and fills them out? Who hands them out?)
- Voting and Elections
 - General and Jurisdictional Delegates (Electronic, paper scanning – Providers, options, costs, time)
 - Constitutional Amendments. Written ballots. Numbers must be recorded and submitted.
 - Endorsement of Episcopal Candidate (Conference rules vary)
 - Divisions of the House.
- TELLERS. Selection and training to provide for effective vote counting, ballot distribution and collections, etc.

Following Annual Conference:

Journal Preparation (*The timeline for Journal completion will vary by conference*).

1. Preparation of Sections:

- Officers of the Conference, Committees and Directories
- Daily Proceedings
- BAC
- Appointments
- Resolutions
- Reports
- Memoirs
- Roll of the Dead
- Historical Record
- Miscellaneous (can include anything required by the Annual Conference Rules, such as printing of rules; sermons that are requested by the bodies, list of surviving spouses. This is the place to include required salaries of extension ministries (Paragraph 628).
- Pastoral Records – ordination and service records
- Financial Reports, including budget
- Statistical Reports

Conference Secretary is responsible to see that the Journal is published. Some Conference Secretaries do the collection, editing and production. Others oversee the production and arrange for printing, etc. If the Conference Secretary writes the memoirs, then contact with the families is required.

Depending on Conference Policies this may include the sale of the Journals, production of digital versions of the Journal and preparation for the Journal on the Conference Website.

Production of the Journal is regulated by Conference rules in terms of timelines, printer, distribution, etc. As part of the distribution, send two printed copies or a digital version of the annual conference Journal to GCFA, GBOPHB, GCAH, Central or Jurisdictional Commission on Archives and History, and the Annual Conference Commission on Archives and History. One printed copy or a digital version to the Connectional Table and one to UCom. If available, one copy of a digital version to GCAH and UCom.

Reports for GCFA and Other General Agencies

(Most reports expected within 6 weeks of the conclusion of the conference – some deadlines will be earlier especially those dealing with Jurisdictional Conference)

- Varies according to year
- Always includes the BAC (contact information, property report and ministry related information), the appointment list, and the Officers Sheet to GCFA
- Certify election of General and Jurisdictional delegates and report elections of delegates to the Secretary of the General Conference
- Report Jurisdictional delegate information to Jurisdictions as requested
- Report to Council of Bishops on the annual conference vote on Constitutional Amendments
- Report nominations for Jurisdictional Pool to Jurisdictional Secretary and Secretary of the General Conference
- Any appeals to the body of a bishop's ruling on a question of law should be reported to the Judicial Council.
- Submit petitions in proper form for General Conference
- Follow-up on any requirements from resolutions from the Annual Conference

Other Ongoing Responsibilities

- Between Sessions: Clergy record information, including updates in appointments and status. This information is essential to determine membership of the Annual Conference, eligibility for election and voting eligibility.
- Work with assigned administrative committees (varies by conference)

Each Annual Conference has its own expectations of the Conference Secretary. Become familiar with what those expectations are in your Annual Conference. Some of the possibilities are interpreting the work of the General Conference (such as any Constitutional Amendments); participation in Council of Ministries or alternative structure; maintaining data base of lay and clergy persons who are qualified to serve in ministry capacities in the Annual Conference.

The Quadrennial Time Line

It is essential that the Secretary of the General Conference be kept informed of the contact information for annual conference secretaries in order to distribute official documents and communications throughout the quadrennium.

The Quadrennial Election Cycle

¶603.7. The annual conference at the first session following the General Conference or jurisdictional or central conferences (or, if it may desire, at the last session preceding the General, jurisdictional, or central conferences), utilizing such nominating procedure as the Annual Conference shall determine, shall elect a secretary and statistician to serve for the succeeding quadrennium. In the case of a vacancy in either office in the interim of the sessions, the bishop, after consultation with the district superintendents, shall appoint a person to act until the next session of the annual conference. (See ¶ 619 for election of the treasurer.)

¶ 619. Conference Treasurer/Director of Administrative Services-Each annual conference, on nomination of its council on finance and administration, shall at the first session of the conference after the quadrennial session of the General Conference or jurisdictional conference, or at such other times as a vacancy exists, elect a conference treasurer or conference treasurer/director of administrative services.⁷⁰ The treasurer or treasurer/director shall serve for the quadrennium or until a successor shall be elected and qualify. If a vacancy should occur during the quadrennium, the council shall fill the vacancy until the next session of the annual conference. After consultation with the bishop in charge, the council may remove the treasurer or treasurer/director from office for cause and fill the vacancy until the next session of the conference. The treasurer/director shall be directly amenable to the council. The treasurer/director may sit with the council and its committees at all sessions and have the privilege of voice but not vote.

¶ 635. Conference Board of Ordained Ministry-1. Each annual conference at the first session following the General Conference, shall elect for a term of four years a Board of Ordained Ministry...

Year One following General Conference

Annual conferences vote on constitutional amendments during the calendar year following General Conference and the number of persons voting for and against each proposed amendment must be sent to the Executive Secretary of the Council of Bishops. Please transmit that information within thirty days of the voting to:

Executive Secretary

Council of Bishops of The United Methodist Church

100 Maryland Ave NE

Washington DC 20002.

Email instructions will be on the official certificate which is to be signed and submitted by the secretary of the annual conference. Please also send a copy to the Secretary of the General Conference.

Year one is also the year in which the annual conference should decide when it will choose its General Conference delegation and the process by which elections will be held. “Delegates to the General Conference shall be elected at the session of the annual conference held not more than two annual conference sessions before the calendar year preceding the session of the General Conference.” (¶502.3) Information regarding the number of delegates to be elected will be distributed by the secretary of the General Conference no later than December first of that year.

Information regarding the submission of petitions to General Conference will be distributed as early in the quadrennium as it is available.

Year Two following General Conference

This year is the first opportunity for the election of delegates to General Conference. Within thirty days of the election, the certificate of election and delegate information forms should be returned to the Secretary of the General Conference.

Petitions to General Conference may be acted upon and prepared for submission to the petitions secretary. Information regarding the submission of petitions to General Conference will be distributed as early in the quadrennium as it is available.

Year Three following General Conference

If elections were not held in year two, they must be held in year three.

Changes in delegations must be certified by the secretary of the annual conference to the Secretary of the General Conference. Changes may occur for a variety of reasons, but regardless of the reason, it is the secretary who must certify the change. This responsibility may not be delegated to or assumed by a Head of Delegation or Secretary of Delegation.

Petitions to the General Conference must be submitted to the petitions secretary no later than 230 days prior to the opening session of the General Conference for inclusion in the Advance Daily Christian Advocate, but secretaries are highly encouraged to do so within thirty (30) days of the adjournment of the annual conference session. Petitions from annual conferences meeting between 230 days and 45 days in advance of the opening session of the General Conference are to be sent immediately upon adjournment of the annual conference.

Year Four, the year of General Conference

Changes in delegations must be certified by the secretary of the annual conference to the Secretary of the General Conference. Changes may occur for a variety of reasons, but regardless of the reason, it is the secretary who must certify the change. This responsibility may not be delegated to or assumed by a Head of Delegation or Secretary of Delegation.

Report to the Secretary of the General Conference the names of any persons who have died since their election as a delegate to the General and jurisdictional conferences. This includes reserve delegates to the jurisdictional conference.

Upon receipt from the Secretary of the General Conference, sign and distribute the Credential Cards for delegates and reserve delegates.

Remind the bishop and the delegation that they are responsible for submitting a list of nominees to be adopted by the annual conference and submitted to the jurisdictional pool. (§705.1.a and b) Build time into the annual conference agenda to allow for the required nominations from the floor and for the election to the pool. Information will be distributed outlining the process for entering the required information from delegates and others elected to the pool. Additional information will be distributed following General Conference to incorporate any changes adopted by General Conference.

Overview of Responsibilities

This section consists of a list of tasks which have been identified by at least some conference secretaries as being part of their work. It should be stressed that not every secretary is responsible for all of the duties and functions listed below. Every annual conference is different, and some conferences assign some of these responsibilities to other officers or, because of differing methods of operation, have no comparable functions.

The tasks in this list are organized by their relationship in time to the annual conference session.

Responsibilities in Preparation for Annual Conference Sessions.

1. Preliminary reports—specify format, set due dates, arrange for or complete computer entry where appropriate, supervise printing or duplication and distribution.
2. Prepare roll of clergy and lay members and alternates (may include implementation of lay equalization formula), or review computerized roll to ensure that it is accurate and updated.
3. Plan and implement registration/pre-registration process (registration blanks, badges, other materials).
4. Select, train and assign specific responsibilities to staff; may include choosing persons to serve as tellers, pages, etc.
5. Work with Arrangements or Sessions Committee regarding office equipment and supplies, computer equipment and supplies, and other office facilities needed at the site of the conference (including any facilities needed for duplicating reports).
6. If conference sessions are to be taped and/or streamed, make arrangements for equipment and personnel needed.
7. Collect Memoirs, check readiness of other permanent Journal material which will not be affected by annual conference actions.

8. If so assigned by the bishop, the secretary may have responsibility for working with the Agenda Committee in developing the agenda for the conference session.
9. If the conference has a petitions process, the secretary may have responsibility in receiving, classifying and referring them.
10. Plan the procedure for taking count votes, including provision for written ballots. If some form of electronic voting is to be used, be sure all needed hardware and supplies are available, and that the software has been tested under exactly the same conditions and with equipment identical to that which will be used at the conference session.
11. Contact persons who will be responsible for reports and other information to be printed in the Journal; let them know prior to the session what is needed from them (including any time deadlines and space limitations).
12. Order and prepare retirement certificates, credentials (if requested by the bishop).
13. Arrange for any other forms and materials that may be needed (e.g., forms for submitting motions in writing).

Responsibilities during the Conference Session

1. Organizational matters—certify quorum, nominate assistant secretaries.
2. Prepare working agenda for the presiding bishop and/or assist the bishop, as requested, in keeping the sessions on schedule in accordance with the agenda.
3. Keep track of the parliamentary situation—e.g., wording of motions, amendments, substitutes, progress in debating them and the sequence in which they are to be considered, timing of debates. In the absence of a parliamentarian the bishop may depend on the secretary for assistance in such matters.
4. Prepare materials needed by the bishop during the session (copies of reports, reminders of Orders of the Day, etc.).
5. Oversee responsibilities delegated to secretarial staff, tellers, and pages.
6. Recording of sessions (audio, video, minutes); even if session is being recorded, notes should be taken as a precaution against equipment failure, media storage damage, or other unforeseen circumstances.
7. Oversee duplication and distribution of materials (may include last minute reports, motions or resolutions for conference action, summaries of previous day's sessions, and/or promotional materials, depending on individual conference rules, practice, and procedures).
8. Make announcements and/or arrange alternate communications channels to limit the number of announcements.
9. Give instructions on preparing ballots or taking count votes.
10. Prepare and send messages of greeting, sympathy, concern/courtesy matters.
11. Work with committee charged with reviewing and approving minutes. (i.e. Committee on Journal)

Reporting Annual Conference Actions

1. To annual conference agencies--depending on annual conference practice, the secretary may have responsibility for getting information to conference agencies on matters referred to them or actions they are to implement. This may take the form of a post-conference "debriefing" session or retreat with agency representatives, distributing copies of the minutes to conference agencies, or sending them copies of motions which were adopted affecting their operations.
2. Notify persons chosen to serve on conference agencies of their election.

3. Prepare reports needed by general agencies ("Business of the Annual Conference" form, appointment and directory information requested by GCFA).
4. Certify election of General Conference delegates and reserve delegates to Secretary of the General Conference. This includes jurisdictional conference delegates and reserve delegates.
5. Prepare any petitions approved by the annual conference for submission to General Conference.
6. Report to the Secretary of the General Conference and jurisdictional conference secretary after elections of additional members of the jurisdictional nominations pool. (Note: This process begins with the Bishop and the General and jurisdictional conference delegation. See ¶705.1)
7. Report to the Executive Secretary of the Council of Bishops on the annual conference vote on proposed constitutional amendments. (Note: Constitutional amendments are normally considered in the calendar year following General Conference. The agenda should provide time for their consideration.) A copy should be sent to the Secretary of the General Conference.
8. Report to Judicial Council on any appeals to that body of a bishop's ruling on a question of law (see ¶ 2718.2, *Book of Discipline*).
9. The annual conference may order that copies of specific resolutions or actions be sent to other persons or organizations (legislators, companies, etc.). If the conference does not designate responsibility for follow-up on such actions (either as a part of the action itself, by conference rule, or by some other means), the secretary may be responsible for such follow-up.

Editing the Annual Conference Journal

In some annual conferences this responsibility is being assigned to a Journal editor other than the secretary, but in the majority of conferences where no such arrangement exists, it is the responsibility of the secretary.

1. It is assumed that all arrangements with a printer or publisher for the printing of the Journal will have been made well in advance of the time copy is ready to be submitted (see section E, 3-4, below).
2. Update lists or computer files of names and addresses of annual conference officers and membership of conference agencies to reflect any changes which have occurred since publication in the previous year's Journal; prepare and submit copy.
3. Update lists or computer files of conference membership rolls and directories to reflect changes in membership, changes in conference relationship, appointment changes, and other changes of address; prepare and submit copy.
4. Submit Daily Proceedings copy as approved by the committee charged with reviewing and approving the minutes.
5. Submit "Business of the Annual Conference" and appointments copy, including last-minutes changes in any material which is not fixed by conference action.
6. Collect, prepare and submit copy for reports ordered printed by the conference; or, if reports have been printed before the session, correct and update the copy or computer files containing such reports to reflect conference action.
7. Collect, prepare and submit copy for Memoirs.
8. Update and submit copy for such sections as conference standing rules, rolls of deceased clergy, historical material, etc.
9. Update and submit copy or computer files containing service records of ordained and diaconal ministers and local pastors.
10. Secure and submit copy for statistical tables as prepared by statistician and/or treasurer.

11. Prepare index; a thorough and usable index to the Journal will save users many times the amount of time required to prepare it.
12. Read, correct, and approve proofs as needed (depends on printing process being used).
13. Distribute the Journal (preparation of labels or lists for distributing).

Key Disciplinary Provisions on Journals

There are numerous paragraphs in the *Book of Discipline* relating to information to be included in annual conference journals. However, ¶¶606.3 and 527 are two key paragraphs to observe; they are reproduced below. In ¶606, the italicized paragraph numbers point to additional paragraphs related to the respective topics or sections.

¶606.3.

The annual conference may form a committee on journal publication. The annual conference journal shall include the following divisions, in the following order:

- a) *Officers of annual conference,*
- b) *Boards, commissions, committees; rolls of conference members, (See also ¶¶415.6, 415.7, 606.4, 606.5)*
- c) *Daily proceedings, (See also ¶¶605.4, 606.1, .9, 2609.6, 2718.2.)*
- d) *Business of the annual conference report (formerly known as the disciplinary questions), See also ¶¶604.11, 1506.3b), 1506.5.*
- e) *Appointments, See also ¶¶415.7, 1314.3b)-c).*
- f) *Reports as ordered by the annual conference, See also ¶¶605.4, 613.5, 619.1c(2), 619.1d), 1508.7a), 1509.3d).*
- g) *Annual report of the district superintendents, if any.*
- h) *Memoirs as ordered by the annual conference, following the guidelines of the General Commission on Archives and History,*
- i) *Roll of dead-deceased clergy members,*
- j) *Historical,*
- k) *Compensation for Extension Ministries, See ¶628.*
- l) *Pastoral record (including the records of accepted local pastors in such manner as the conference may determine), See also ¶¶344.5e), 606.5, 606.6, 606.9.*
- m) *Statistics, See also ¶¶230.6, 606.8, 638.4c).*
- n) *Index.*

¶527

The jurisdictional conference shall have authority to examine and acknowledge the journals of the annual conferences within its bounds and shall make such rules for the drawing up of the journals as may seem necessary. (Note: see also ¶606.1.)

Ongoing Responsibilities

1. Serve as an ex-officio member of the Conference Council on Ministries or comparable structure. (Note: Specific legislation related to conference councils on ministries no longer appear in the *Discipline*; whether this kind of relationship with a conference program coordinating agency continues is a matter determined in each conference.)

2. Serve on or meet with certain annual conference committees. Depending on annual conference organization and practice, this may include any or all of the following: Conference Arrangements, Rules: Agenda, Nominating, Archives.
3. Keep under review the process by which the Journal is produced and evaluate alternate processes and printers/publishers. This should be done on an ongoing basis in order to be able to take advantage of changes in technology and other factors which may be able to achieve savings in costs or time in the publication of the Journal.
4. Have full and complete communications with the printer of the Journal on such matters as copy format, deadline for submitting copy, publication dates, costs and other contract terms, and the division of responsibilities between the printer and the editor.
5. Review periodically the contents of the Journal, measuring it against specific criteria and functions.
6. If designated to do so by the annual conference, maintain service records of ordained and diaconal ministry personnel on behalf of the annual conference (§§ 606.6, 606.9, *Book of Discipline*).
7. Maintain and update, on an ongoing basis, material such as conference rolls, lists of conference agency membership, and other material for publication in the Journal and for use by the bishop and other officers of the conference.
8. Carry on such correspondence as is required to fulfill the functions of the office and as may be assigned by the bishop.
9. Maintain files of surrendered credentials, judicial proceedings, and other archival material as specified in the *Book of Discipline* or by conference action or practice.
10. Distribute copies of the annual conference journal:

Selected Legislation Pertaining to Annual Conference Secretaries

The following is an abstract of paragraphs from the 2016 *Book of Discipline* which either make specific mention of the conference secretary's work or are very directly related to the work of that office. Some paragraphs from the 1992 *Discipline* which remain relevant because of the transitional provisions in the 1996 ministry legislation are also included. It is organized into subsections which list and describe briefly disciplinary paragraphs related to the following topics:

- Annual Conference Membership
- The Diaconal Ministry
- Local Pastors
- Orders, Credentials, and the Ordained Ministry
- Election of Conference Secretary
- Conference Business, Records and Archives, Journal
- Miscellaneous Provisions
- Trials, Judicial Proceedings, Decisions of Law

Annual Conference Membership

Paragraph #	Paragraph
32	Constitutional definition of annual conference membership: clergy and lay membership as defined by the General Conference; professing lay members elected by

	pastoral charges; the diaconal ministers, the active deaconesses, and home missionaries under episcopal appointment within the bounds of the annual conference; ex-officio members; members under 30 years of age; qualifications of lay members; directive to provide for election of additional lay members if needed to equalize lay and clergy membership.
142	Definition of "clergy": commissioned ministers, deacons, elders, and local pastors (full- and part-time), who hold membership in an annual conference, and who are commissioned, ordained, or licensed.
251.2	Responsibilities and qualifications for lay members of the annual conference.
259.3	A pastor of The United Methodist Church, while serving as the pastor of a new church prior to the convening of a constituting conference (§ 259.7), may receive a person into the membership of The United Methodist Church under the conditions of § 217. When a person is received as either a baptized or a professing member, the pastor shall send the name, address, and related facts to the annual conference secretary for recording on a general membership roll. These names shall be transferred as soon as possible to the roll of the new church, when constituted, or to another church upon the member's request. If the new church is being sponsored by an existing church, membership may be recorded on the roll of that church.
268	<i>Certified Lay Minister</i> — A certified lay minister is a certified lay servant, certified lay missionary, or equivalent as defined by his or her central conference, who is called and equipped to conduct public worship, care for the congregation, assist in program leadership, develop new and existing faith communities, preach the Word, lead small groups, or establish community outreach ministries as part of a ministry team with the supervision and support of a clergy person. A certified lay minister is assigned by a district superintendent in accordance with § 419.2.
[1992] 309.1	Diaconal ministers shall have rights of voice and vote in the annual conference where church membership is held; eligible to serve as a lay member on conference agencies and for election as lay delegate to General or Jurisdictional Conferences. (See also § 602.2, 4 2012 & 2016 <i>Discipline</i> .)
[1992] 313.1e	Diaconal ministers shall not have voice or vote in the annual conference while on "extended leave"; reinstatement following extended leave requires a vote of the annual conference.
306-309	General provisions pertaining to Order of Deacons and Order of Elders--purpose, organization, membership.
318.5	Agency membership rights of local pastors in the annual conference.
321.1	Voting rights of associate members.
321.2	Agency membership rights of associate members.
327.2	Voting rights of provisional members
327.3	Agency membership rights of provisional members.
329	Rights and responsibilities of deacons in full connection.
331	Appointment of deacons and provisional deacons to various ministries
331.8	Deacons and provisional deacons, with the approval of their bishop and the judicatory authorities of the other denomination may receive an appointment to another denomination while retaining their home conference membership. The appointment may be made in response to exceptional missional needs.
346.1	With approval and consent of the bishops or other judicatory authorities involved, ordained clergy or provisional members of other annual conferences or other

Methodist churches may receive appointments in the annual or missionary conference while retaining their home conference membership or denominational affiliation. Appointments are to be made by the resident bishop of the conference in which the clergy person is to serve. If appointment is to a missionary conference, the terms of the appointment shall be as provided in ¶ 586.4. Otherwise upon the recommendation of the Board of Ordained Ministry, clergy in such appointments may be granted voice but not vote in the annual conference to which they are appointed. Their membership on conference boards and agencies is restricted to the conference of which they are a member. (**Note:** See also ¶ 602.3, *Discipline*.)

334.1	Voting and election rights of members in full connection.
334.5	Clergy who are retired, on incapacity leave, or on sabbatical leave, may at their own initiative apply to the conference Board of Ordained Ministry for affiliate membership in the annual conference where they reside. If approved, they may serve on conference boards, agencies, task forces, and committees, with voice but without vote.
344.4	Ordained clergy appointed to extension ministries or appointed beyond the local church outside the boundary of their annual conference may at their own initiative apply to the Board of Ordained Ministry for affiliate membership in the annual conference where their appointment is located or in which they reside. If granted, they may serve on conference boards, agencies, task forces, and committees, with voice and vote but with voice and without vote in the annual conference session.
346.2	On recommendation of the Board of Ordained Ministry, the clergy members in full connection of an annual conference may approve annually clergy in good standing in other Christian denominations to serve appointments or ecumenical ministries within the bounds of the annual conference, while retaining their denominational affiliation. (Limited membership and voting rights are described.)
353.7	Clergy on voluntary leave of absence are eligible for membership on agencies and may vote for and be elected as delegates to General or Jurisdictional Conferences.
369.1 602.1	Clergy membership: members in full connection, provisional members, associate members, affiliate members, and local pastors under fulltime and part-time appointment to a pastoral charge. ¶ 602.1a), b), c), and d) specify the voting rights of these classifications of clergy members.
602.1e	Inclusion of campus ministers, chaplains and Wesley Foundation directors and laypersons in annual conference composition.
602.2	Consecrated diaconal ministers will continue as lay members of the annual conference as long as they maintain this status.
602.3	Persons who became associate members prior to January 1, 1997, may continue as such and serve under the provisions of the 1992 <i>Discipline</i> as long as they hold this status. (Note: See ¶419 of the 1992 <i>Discipline</i>)
602.4	Lay membership of the annual conference. (need equalization formula)
602.5,.7	Provisions governing the seating of lay members and alternates in regular or special sessions of the Conference.
602.6	Voting authority of lay members.
602.8	Clergy members unable to attend conference session shall report by letter to the conference secretary; if an ordained minister in active service is absent from the conference session without a satisfactory reason, the matter shall be referred by the conference secretary to the Board of Ordained Ministry.

602.9	Seated in the annual conference with the privilege of the floor, but without vote: official representatives of other denominations invited by the annual conference, missionaries regularly assigned by the General Board of Global Ministries and serving within the bounds of the annual conference, lay missionaries appointed by the General Board of Global Ministries in nations other than the United States, and certified lay missionaries from nations other than the United States serving within the bounds of the annual conference.
602.10	Conference chancellor, if not otherwise a voting member of the annual conference, shall be given the privilege of the floor without vote.
604.3	The annual conference may admit into clergy membership only those who have met all the disciplinary requirements for membership and only in the manner prescribed in the <i>Discipline</i> .
604.6	Provisions governing the vote of ministers who transfer into the conference at the session during which they are received.
1913.5	Deaconesses and home missioners to be seated in the sessions of the conference with voice and vote; eligible for membership in the conference if elected in accordance with ¶ 32 or ¶ 602.4.

The Diaconal Ministry

Note: all references in this section are to The Book of Discipline 1992

Paragraph #	Paragraph
307	Bishop and secretary provide credentials to diaconal minister upon consecration.
313.1	Record diaconal ministers' leaves of absence in the Journal; leaves of absence and returns to active status granted between conference sessions, with the effective date, shall be entered in the next Journal.
313.2d	List retired diaconal ministers annually in the Journal of the conference in which their retired relationship is held.

See also ¶¶ 301-317 for other provisions governing appointments, credentials, records, and conference relationships of diaconal ministers.

(Note: ¶ 635.1c: Assigns all responsibilities formerly held by boards of diaconal ministry in relation to certified and consecrated persons to boards of ordained ministry.)

Local Pastors

Paragraph #	Paragraph
316.1	Appointed to extension ministry settings when approved by the bishop and the Board of Ordained Ministry.
318	After the requirements for the license as a local pastor have been met, the district committee on ordained ministry shall certify the completion of the prescribed studies to the candidates and the Board of Ordained Ministry, and they shall be listed in the Journal as eligible to be appointed as local pastors. License is not awarded until the person is appointed.

320.1	When a local pastor is discontinued, license and credentials shall be surrendered to the district superintendent for deposit with the conference secretary.
320.5	Explains who should be listed on the "Business of the Annual Conference" as having been "recognized as retired local pastors." Voice but no vote in conference session.
315-320	Contain the provisions governing licensing, classifications, appointments, exiting, reinstatement, and retirement of local pastors.

Orders, Credentials, and the Ordained Ministry

The following is an outline of 2016 *Discipline* paragraphs related to the ordained ministry and within these sections criminal background checks (¶¶ 301-369):

Section #	Title
Section I	The Meaning of Ordination and Conference Membership (¶¶ 301-304)
Section II.	Clergy Orders in The United Methodist Church (¶¶ 305-309)
Section III.	Candidacy for Licensed and Ordained Ministry (¶¶ 310-314)
Section IV.	License for Pastoral Ministry (¶¶ 315-320)
Section V.	Associate Membership (¶¶ 321-323)
Section VI.	Provisional Membership (¶¶ 324-327)
Section VII.	The Ordained Deacon in Full Connection (¶¶ 328-330)
Section VIII.	Appointments of Deacons and Provisional Deacons to Various Ministries (¶ 331)
Section IX.	The Ordained Elder in Full Connection (¶¶ 332-336)
Section X.	Appointments to Various Ministries (¶¶ 337-342)
Section XI.	Appointments to Extension Ministries (¶¶ 343-345)
Section XII.	Clergy from Other Annual Conferences, Other Methodist and Christian Denominations (¶¶ 346-347)
Section XIII.	Mentoring and Mentors (¶ 348)
Section XIV.	Evaluation for Continuing Formation for Full Members and Local Pastors (¶¶ 349-351)
Section XV.	Changes of Conference Relationship (¶¶ 352-360)
Section XVI.	Administrative Fair Process (¶¶ 361-363)
Section XVII.	Readmission to Conference Relationship (¶¶ 364-368)
Section XVIII.	General Provisions (¶369)

Paragraph #	Paragraph
325	Act of commissioning provisional members; bishop and secretary are to provide credentials to the commissioned minister.
327.6 and .7	Discontinued provisional members surrender credentials to the district superintendent for deposit with the conference secretary; Board of Ordained Ministry files with the bishop and conference secretary a permanent record of the circumstances relating to discontinuance. No retirement under provisional status (discontinuance or RL status)
330	Requirements for admission to full connection and ordination as a deacon
330.6	Following election, the bishop and secretary of the conference shall provide a certificate of full membership and, following ordination, a certificate of ordination.
331.1	Categories of appointment for deacons.

331.7	Provisions governing less than full-time service of a deacon.
335	Requirements for admission to full connection and ordination as elder.
337	General provisions governing appointment of elders, appointment of local pastors as pastors in charge.
338.2	Provisions governing less than full-time service of an elder.
338.3	Provisions related to interim appointments to charges with special transitional needs.
339	Definition of a pastor.
344.1	Categories of appointments to Extension Ministries for elders (formerly known as appointments beyond the local church).
344.2, .3	Reporting and accountability requirements for elders appointed to extension ministries.
344.5c	All conference secretaries submit to the editors of the General Minutes a list of appointments to extension ministries made in their conference, and there shall be published in the General Minutes a list of ministers serving in the major categories under these appointments.
347	Provisions governing the transfer and/or recognition of orders of ordained ministers from other annual conferences and other Methodist and Christian denominations.
347.6	Inscription to be written on credentials of ministers whose orders from another church have been duly recognized; also, a certificate of recognition of orders signed by the bishop is to be furnished.
356.1,.3	Record in the conference minutes medical leaves granted by the Annual Conference, and the termination of such medical leaves.
358.1	Granting of certificates of honorable location.
358.2	The names of located members after the annual passage of their character shall be printed in the Journal. Deposit credential ¶ 361)
358.3	Ordained ministers on honorable location may request the annual conference to grant them the status of honorable location—retired.
360.1	Certification of conference membership of a minister withdrawing to unite with another denomination deposited with the conference secretary.
360.2	When a member in good standing withdraws from the ordained ministerial office, the credentials shall be surrendered to the district superintendent for deposit with the conference secretary.
360.3	Clergy members withdrawing under complaint surrender credentials to the district superintendent for deposit with the conference secretary. Withdrawn under complaint or withdrawn under charges shall be written on the face of the credentials. (See also ¶ 2719.2.)
360.4	Depositing of credentials when a member withdraws between conference sessions.
361	Procedures related to administrative location.
364	Restoration of credentials to readmitted provisional members.
365	Restoration to conference membership of persons who previously located.
366	Restoration of credentials to readmitted members who previously left the ministerial office.
367	Restoration of credentials to readmitted members after termination by action of the annual conference
368	Restoration of credentials to readmitted members after involuntary retirement
416.5	Directs that bishops send written notice of transfers from conference to conference to the secretaries of both conferences involved and to other specified agencies.

Election of Conference Secretary

Paragraph #	Paragraph
603.7	The annual conference, at the first session following General Conference or jurisdictional conference, or at the last session preceding same, elects the secretary to serve for the succeeding quadrennium. In case of vacancy, the bishop, after consultation with the district superintendents, appoints a replacement until the next conference session.

Conference Business, Records and Archives, Journal

Paragraph #	Paragraph
230.6	Direction regarding the publication of membership of union or federated churches.
308	Organization of an order.
309	Membership in an order. (§309.3 addresses surrender of credentials to secretary)
344.5e	Journal shall reflect individual clergy participation in Armed Forces Reserve, National Guard units, and part-time employment with the Veteran's Administration.
369.5	Requires executive session of clergy members in full connection be held at the site of the regular session of the annual conference, or at an alternative time and location determined by the bishop after consultation with the cabinet and the executive committee of the Board of Ordained Ministry, for consideration of matters relating to ordination, character, and conference relations. See also ¶ 605.7.
415.6	Responsibility of bishop to see that the names of persons commissioned and consecrated are entered in the Journal, and that proper credentials are furnished to them.
415.7	Responsibility of bishop to see that names and appointments of deaconesses, home missionaries, and missionaries are printed in the Journal.
527	Jurisdictional conference has authority to examine and acknowledge the Journals of the annual conferences within its bounds and make such rules for the drawing up of the Journals as may seem necessary.
604.11	During its sessions, the annual conference shall secure the answers to the questions for conducting annual conference sessions, and the secretary shall include the answers to these questions in the conference Journal and in the report to the General Council on Finance and Administration. ("Business of the Annual Conference" form)
605.1	Call of the roll, including local pastors.
605.2	Conference agenda prepared by bishop, district superintendent, conference lay leader, such others as the conference may name, and submitted to the conference for adoption.
605.4	Business of the conference: receiving and acting on reports from district superintendents, officers, standing and special committees, boards, commissions and societies, and the making of such inquiries as the Council of Bishops shall recommend by the provision of a supplemental guide.
605.7	Provisions governing attendance, voice, and vote at the clergy session.
606.1	Annual conference shall keep an exact record of proceedings according to forms provided by General and Jurisdictional Conferences. If the conference has no archives, the secretary is to keep the bound copy or copies to be handed on to the succeeding

	secretary. Conference is to send to its jurisdictional conference copies of the minutes for the quadrennium for examination.
606.2	Send two printed copies or a digital version of the annual conference Journal to GCFA, GBOPHB, GCAH, Central or Jurisdictional Commission on Archives and History, and the Annual Conference Commission on Archives and History. One printed copy or a digital version to the Connectional Table and one to UMCom. If available, one copy of a digital version to GCAH and UMCom.
606.3	Lists divisions and mandated sequence of Journal contents. Annual conference may form a committee on journal publication.
606.4	Instruction to publish list of deaconesses and missionaries in Journal.
606.5	Journal to include listing of consecrated diaconal ministers and their service records.
606.6,9	Instruction to conference secretary, treasurer or other administrative officer named by the annual conference to keep service records and other pertinent records of ordained and diaconal ministry personnel; includes description of service record content. ¶ 606.9 sets forth principles and provides for guidelines governing such records. See also ¶ 635.2I).
606.8	Use of standard forms prepared by GCFA - uniformity of reporting.
613.5	Statement of investment policies as approved by the conference council on finance and administration to be printed in the Journal at least once each quadrennium.
619.1c (2)	Conference treasurer's report of all receipts, disbursements, and balances of all funds to be printed in the Journal.
619.1d	Listing of securities held to be printed annually in the Journal (refers to funds held by conference treasurer).
628	Compensation of clergy appointed to extension ministries to be published in the Journal.
635.2u (5)	That the conference Board of Ordained Ministry report annually to the annual conference for publication in the conference Journal a roster of all persons certified in professional careers for which they have received certification, including places of service address.
639.4c	Conference statistical tables shall provide separate columns for reporting the amount apportioned to each pastoral charge for pension and benefit purposes and the amount paid thereon.
1913.3b, c	Appointments of deaconesses to be fixed by the bishop at annual conference, printed in the Journal. Secretary is to keep a record of all persons who have been commissioned and/or consecrated to the Office of Deaconess or Home Missioner and print a list of their appointments annually in the Journal.
1506.3b	Pension credit for service as a local pastor prior to 1982 may be granted only by vote of the annual conference and, if granted, should be reported on the "Business of the Annual Conference" in the question, "What other personal notation should be made?"
1506.5	If an Annual Conference revises, corrects, or adjusts an ordained minister's record of pension credit, the changes are to be recorded in the Journal in "Business of the Annual Conference" questions.
1508.7a	Print in Journal a list of the investments held by each agency handling (pension) funds directly or indirectly under the control of the annual conference (or the list may be distributed directly to members of the conference at their request).
1509.3b	In event of conference merger, minutes of the Joint Distributing Committee are to be filed with the secretary of each annual conference involved and with GBOPHB.

1509.3d	Findings and actions of Joint Distributing Committee to be published in the Journal.
1711.3i	Deposit two printed copies of Journal annually in the central archives (of The United Methodist Church) and in the appropriate regional archives. One copy of a digital version, if available, to the General Commission on Archives and history.
2609.6	Decisions of law by bishop—Annual conference secretary enters in the Journal an exact statement of the question submitted and the ruling of the bishop.

Miscellaneous Provisions

Paragraph #	Paragraph
41	If a local church is being transferred from one conference to another, the conference secretaries must certify the vote of the annual conference on such a transfer. (See also ¶ 260). Timeline of vote is specified.
502.3,4,5	Conference secretary receives notification from Secretary of the General Conference of the number of General Conference delegates to be elected; conference secretary sends certificate of election to the Secretary of the General Conference and issues signed credentials to the delegates.
507	Provisions governing the preparation of petitions to General Conference.
604.10	Annual conference sends, through the presiding bishop and the secretary, a certificate of organization to each new church organized; the certificate is presented by the district superintendent in an appropriate ceremony.
712	When a vacancy in the membership of a general agency has been filled (during the quadrennium), the secretary of the agency is to notify the new member's annual conference secretary.

Trials, Judicial Proceedings, Decisions of Law

Paragraph #	Paragraph
51	Bishop decides questions of law which arise in the regular business of a conference session, provided the questions are presented in writing; the decision is to be recorded in the Journal of the conference.
2609.6	Decisions of law by bishop—Annual conference secretary enters in the Journal an exact statement of the question submitted and the ruling of the bishop.
2612	Decisions of the Judicial Council are to be filed with the secretary of the General Conference and with the bishop, chancellor, and secretary of each annual conference.
2706.4e	Secretary retains record of committee on investigations when complaint is dismissed or returned to the bishop.
2706.5b(2) and (3)	Secretary receives from Committee on Investigation a copy of charges and specifications against a clergyperson other than a bishop or against a diaconal minister.
2713.5	Secretary receives from a trial court, at the conclusion of a trial, all trial documents and keeps them in custody, held in a confidential file. The paragraph describes how such documents must be made available in case of an appeal, and the other conditions under which they may or may not be released (see also 2716.3).
2718.2	Appeals on questions of Law: when taken in an annual conference, written notice shall be served on the secretary; “It shall be the secretary's duty to see that an exact statement of the question submitted and the ruling of the chair thereon shall be

	<p>entered on the Journal." Secretary is to make and certify a copy of the question and the ruling and transmit it to the secretary of the body to which the appeal is taken.</p> <p>The annual conference secretary would receive such appeals from a charge or district conference (§ 2718.1), present them in open conference, lay them before the presiding bishop for a ruling, and enter the original question and the ruling in the Journal.</p>
2719.2	<p>Record and status of a bishop, clergy member, local pastor, or diaconal minister who withdraws from the Church after being charged with an offense.</p>

Information Needed by the General Council on Finance and Administration

GCFA depends on information from annual conference secretaries to aid in the completion of maintaining an accurate, up-to-date listing of pastoral charges and churches within each annual conference, with the names and mailing addresses of the pastors appointed to each (provisional members, deacons, elders, local and supply pastors). This listing, together with leadership listings of certain annual conference officers, is used by a number of general church agencies, making it unnecessary for each of them to incur the additional time and expense of maintaining their own lists. By *Discipline*, **only** authorized bodies or officers of the Church have access to this information.

To assist with these tasks, GCFA requests the items listed below from each conference secretary. Send to: **GCFA, Data Services Department, 1 Music Circle North, Nashville, TN 37203** or dataservices@gcfa.org.

1. **A complete listing of appointments of all ordained clergy and local pastors** (both pastoral appointments, appointments to extension ministries and appointments beyond local churches, please include all lay/supply pastors that are serving as while) to the **Data Services Department**-- within two weeks of the close of the annual conference session. A two-letter code is utilized at the General Council on Finance and Administration, with many annual conferences following the same coding pattern in their ministerial service records and other record keeping. The following is a listing of the new and continuing codes which will be utilized at GCFA:

DM	Diaconal Minister (<i>2004 Discipline ¶ 369.1</i>)	DC	Deaconess (¶ 1913.2)
DR	Retired Diaconal Minister (<i>consecrated under provisions of 1992 or earlier Discipline</i>)(¶ 357)		
AF	Affiliate Member (¶¶ 334.5, 344.4, 586.4)	OR	Retired member of other Annual Conference
AM	Associate Member (¶¶ 322, 369.1, 635.2h)	RD	Retired Deacon in Full connection (¶ 357)
PD	Provisional Deacon (¶¶ 324, 325)	RE	Retired Full Elder (¶ 357)
FD	Deacon in full connection (¶ 330)	RA	Retired Associate Member (¶ 357)
FE	Elder in full connection (¶ 335)	RP	Retired Provisional Member (¶ 357) (prior to Jan 1, 2013)
PE	Provisional Elder (¶¶ 324, 325)	RL	Retired Local Pastor (¶¶ 320.5, 327.7)
OA	Associate Member of other Annual Conference (¶ 346.1)	FL	Full time Local Pastor (¶ 318.1)
OD	Deacon member of other annual conference (¶ 331.8)	PL	Part time Local Pastor (¶ 318.2)
OE	Elder member of other annual conference or other Methodist denomination (¶ 346.1)	LM	Certified Lay Minister (¶ 268)
OP	Provisional member of other Annual Conference (¶ 346.1)	HL	Honorable Location\Honorable Location Retired (¶¶ 358.1, 358.3)
OF	Full Member of other denomination (¶ 346.2)	AL	Administrative Location (¶ 359)

Not a Disciplinary Code: **SY** - Other Supplies – Used by GCFA for assigned pastors

Quarterly you will receive a communication from the Data Services Department, requesting Conference Level Leadership and District Superintendents updates.

2. **Officers' Sheet**—The Officer's Sheet furnishes GCFA with information used by boards and agencies within the United Methodist Church. Please enter the information requested as soon as possible to expedite the updating of our records. Kindly go to <http://ezra.gcfa.org/leadership.aspx> to complete the **Officer's Sheet** and <http://ezrz.gcfa.org/district.aspx> to complete the District Superintendents updates.

Each spring you will receive a communication from the Data Services Department, containing details about the request for appointment information etc.

3. A completed copy of the "**Business of the Annual Conference**" form should be sent to the Data Services—within three to four weeks after the close of the annual conference session. Blank copies of this report form, with instructions, will be sent by email to each annual conference secretary prior to the conference session.

If your conference holds a special session and actions are taken, they should be recorded on the "Business of the Annual Conference" form.

4. As soon as it is available, send to the Data Services Department a copy of a directory of all ordained clergy, provisional members, local pastors, and supply pastors under appointment-- both to pastoral charges, and appointments to extension ministries, and appointments beyond the local church and the charge conference memberships-- showing the mailing address of each.
5. Send a printed copy or a digital version of the Annual Conference Journal to the Data Services --as soon as it is published.

PLEASE NOTE: The tables provided in all questions (except Q.57) are suggested formats for reporting for the 2017-2020 Quadrennium.

**THE UNITED METHODIST CHURCH
THE BUSINESS OF THE ANNUAL CONFERENCE**

The Minutes of the..... Annual Conference
 Held in
 From (date)....., through.....
 Bishop..... Presiding
 Date When Organized Number of This Session

PART I ORGANIZATION AND GENERAL BUSINESS

1. Who are elected for the quadrennium (§603.7, 619)?

Secretary?

Mailing Address:

Telephone:

Email:

Statistician?

Mailing Address:

Telephone:

Email:

Treasurer?

Mailing Address:

Telephone:

Email:

2. Is the Annual Conference incorporated (§603.1)?

3. Bonding and auditing:

What officers handling funds of the conference have been bonded, and in what amounts (§618, 2511)?

Name	Position	Amount Bonded

Have the books of said officers or persons been audited (§617, 2511)? (See report, page ____ of Journal.)

4. What agencies have been appointed or elected?

a) Who have been elected chairpersons for the mandated structures listed?

Structure	Chairperson	Mailing Address	Phone Number	Email
Council on Finance and Administration (§611)				
Board of Ordained Ministry (§635)				
Board of Pensions (§639)				
Board of Trustees of the Annual Conference (§2512)				
Committee on Episcopacy (§637)				

Administrative Review Committee (¶636)				
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b) Indicate the name of the agency (or agencies) and the chairperson(s) in your annual conference which is (are) responsible for the functions related to each of the following general church agencies (¶610.1):

General Agency	Conference Agency	Chairperson	Mailing Address	Phone Number	Email
General Board of Church and Society					
Discipleship Ministries					
General Board of Ordained Ministry					
Higher Education and Campus Ministry					
General Commission on Archives and History					
General Commission on Christian Unity and Inter-religious Concerns					
General Commission on Religion and Race					
General Commission on the Status and Role of Women					
United Methodist Communications					

c) Indicate the conference agencies and chairpersons which have responsibilities for the following functions:

General Agency	Name of Agency	Chairperson	Mailing Address	Phone Number	Email
Criminal Justice and Mercy Ministries (¶657)?					
Disability Concerns (¶653)?					
Equitable Compensation (¶625)?					
Laity (¶631)?					
Native American Ministry (¶654)?					
Small Membership Church (¶645)?					

d) Indicate the president or equivalent for the following organizations.

Organization	Name of Agency	Chairperson	Mailing Address	Phone Number	Email
Conference United Methodist Women (¶647)					
Conference United Methodist Men (¶648)					
Conference Council on Youth Ministry (¶649)					
Conference Council on Young Adult Ministry (¶650)?					

e) Have persons been elected for the following district boards and committees? Answer yes or no.

- (1) District Boards of Church Location & Building (¶2518.2)?
- (2) Committees on District Superintendency (¶669)?
- (3) District Committees on Ordained Ministry (¶666)?

f) What other councils, boards, commissions, or committees have been appointed or elected in the annual conference?

Structure	Chairperson	Mailing Address	Phone Number	Email

5. Have the secretaries, treasurers, and statisticians kept and reported their respective data in accordance to the prescribed formats? (¶606.8)?

6. What is the report of the statistician? (See report, page ___ of Journal.)

7. What is the report of the treasurer? (See report, page ___ of Journal.)

8. What are the reports of the district superintendents as to the status of the work within their districts? (See report, page ___ of Journal.)

9. What is the schedule of minimum base compensation for clergy for the ensuing year (¶¶342, 625.3)?

10. What amount has been apportioned to the pastoral charges within the conference to be raised for the support of the district superintendents for the ensuing year (¶614.1a)?

11. a) What amount has been apportioned to the pastoral charges within the conference to be raised for the support of the pension and benefit programs of the conference for the ensuing year (¶¶614.1d, 1507)?

b) What are the apportionments to this conference for the ensuing year?

- (1) For the World Service Fund? \$
- (2) For the Ministerial Education Fund? \$
- (3) For the Black College Fund? \$
- (4) For the Africa University Fund? \$
- (5) For the Episcopal Fund? \$
- (6) For the General Administration Fund? \$

(7) For the Interdenominational Cooperation Fund? \$

12. What are the findings of the annual audit of the conference treasuries? (See report, page_____ of Journal)

13. Conference and district lay leaders (§§603.9, 660):

- a) Conference lay leader: Name:
Mailing Address:
- b) Associate conference lay leaders:
- c) District and associate district lay leaders:

14. List local churches which have been:

- a) Organized or continued as New Church Starts (§259,1-4, continue to list congregations here until listed in questions 14.c, d, e or f)

GCFA Number	Church Name	District	Mailing Address	Phone Number	Date Founded

- b) Organized or continued as Mission Congregations (§259,1-4, continue to list congregations here until listed in questions 14.c, d, e or f)

GCFA Number	Church Name	District	Mailing Address	Phone Number	Date Founded

- c) Organized or continued Satellite congregations (§247.22, continue to list here until listed in questions 14.a, d, e or f)

GCFA Number	Church Name	Parent Church	District	Mailing Address	Date Launched

- d) Organized as Chartered (§259,5-10)

GCFA Number	Church Name	District	Mailing Address	Phone Number	Date Chartered

- e) Merged (§§2546, 2547)

(1) United Methodist with United Methodist

District	GCFA Number	Name of First Church	GCFA Number	Name of Second Church	GCFA Number	Name of Merged Church	Date Merged

(2) Other mergers (indicate denomination)

District	GCFA Number	Name of First Church	GCFA Number	Name of Second Church	GCFA Number	Name of Merged Church	Date Merged

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f) Discontinued or abandoned (§§229, 341.2, 2549) (State which for each church listed.)

(1) New Church Start (§259.2,3)

GCFA Number	Church Name	District	Location	Date Closed	Reason for Closer

(2) Mission Congregation (§259.1a)

GCFA Number	Church Name	District	Location	Date Closed	Reason for Closer

(3) Satellite Congregation

GCFA Number	Church Name	District	Location	Date Closed	Reason for Closer

(4) Chartered Local Church (§259.5)

GCFA Number	Church Name	District	Location	Date Closed	Reason for Closer

g) Relocated and to what address

GCFA Number	Church Name	District	Mailing Address	Physical Location	Date Relocated

h) Changed name of church? (Example: "First" to "Trinity")

GCFA Number	Former Name	New Name	Address	District

i) Transferred this year into this conference from other United Methodist conference(s) and with what membership (§§41, 260)?

GCFA Number	Name	Membership	Sending Conference

j) What cooperative parishes in structured forms have been established? (§206)

GCFA Number	Parish Name	Charge Name	Church Name	District

k) What other changes have taken place in the list of churches?

15. Are there Ecumenical Shared Ministries in the conference? (§207, 208)

a) Federated church

GCFA Number	Name	District	Other Denomination(s)

b) Union Church

GCFA Number	Name	District	Other Denomination(s)

c) Merged Church

GCFA Number	Name	District	Other Denomination(s)

d) Yoked Parish

GCFA Number	Name	District	Other Denomination(s)

16. What changes have been made in district and charge lines (please list the GCFA Number beside church name)?

PART II PERTAINING TO ORDAINED AND LICENSED CLERGY

(Note: A (v) notation following a question in this section signifies that the action or election requires a majority vote of the clergy session of the annual conference. If an action requires more than a simple majority, the notation (v 2/3) or (v 3/4) signifies that a two-thirds or three-fourths majority vote is required. Indicate credential of persons in Part II: FD, FE, PD, PE, and AM when requested.)

17. Are all the clergy members of the conference blameless in their life and official administration (§604.4, 605.7)?

18. Who constitute:

- a) The Administrative Review Committee (§636)? (v)
- b) The Conference Relations Committee of the Board of Ordained Ministry (§635.1d)?
- c) The Committee on Investigation (§2703)

19. Who are the certified candidates (§§ 310, 313, 314) (NOTE: Everyone who wants to become a n LP, PE, or PD must first become a certified candidate.)

a) Who are currently certified as candidates for ordained or licensed ministry?

Name	District	Date Certified

- b) Who have had their candidacy for ordained or licensed ministry accepted by a District Committee on Ordained Ministry in another annual conference? (Include name of accepting conference.)

Name	Receiving Conference	Date Originally Certified	Date Accepted by District in Other Conference

- c) Who have been discontinued as certified candidates for licensed or ordained ministry?

Name	District	Date Certified	Date Discontinued

(Note: Once a candidate is appointed as FL or PL, They are no longer listed as a certified candidate (except the first year they are appointed when they would need to be listed in 19 and in 20 or 21). Students appointed as Local Pastors (par.318.3) are the only people who are allowed to be listed as a candidate in one conference while being listed as an LP in a different conference. Par.318.3 stipulates that students appointed as local pastors can serve in either a full or part-time capacity.)

20. Who have completed the studies for the license as a local pastor, are approved, but are not now appointed? (¶315 —Indicate for each person the year the license was approved.): (3/4v)

Name	District	Year Licensed Approved

21. Who are approved and appointed as: (Indicate for each person the first year the license was awarded. Indicate what progress each has made in the course of study or the name of the seminary in which they are enrolled. Indicate with an asterisk those who have completed the five year course of study or the M.Div. (¶319.4)? PLEASE NOTE: Persons on this list must receive an episcopal appointment. (3/4 v)

- a) Full-time local pastors? (¶318.1)

Name	First Year License Awarded	Years Completed with Course of Study

- b) Part-time local pastors? (¶318.2) (fraction of full-time in one-quarter increments)

Name	First Year License Awarded	Fraction of full time to be served	Years Completed with Course of Study

- c) Students from other annual conferences or denominations serving as local pastors and enrolled in a school of theology listed by the University Senate (§318.3,4)?

Name	First Year License Awarded	Seminary	Home Conference

- d) Students who have been certified as candidates in your annual conference and are serving as local pastors in another annual conference while enrolled in a school of theology listed by the University Senate (§318.3)

Name	Serving Conference	Enrolled Seminary

- e) Persons serving as local pastors while seeking readmission to conference membership (§365.4, 367, 368.3)? (If not in this conference indicate name of conference where serving.)

Name	Serving Conference	COS \ Seminary

22. Who have been discontinued as local pastors (§320.1)?

Name	Date discontinued

23. Who have been reinstated as local pastors (§320.4) (v)?

Name	Years Completed in Course of Study

24. What ordained ministers or provisional members from other Annual Conferences or Methodist denominations are approved for appointment in the Annual Conference while retaining their conference or denominational membership (§331.8, 346.1)? (List alphabetically; indicate Annual Conference or denomination where membership is held. Indicate credential.)

- a) Annual Conferences

Name	Clergy Status	Home Conference

- b) Other Methodist Denominations

Name	Clergy Status	Denomination

25. What clergy in good standing in other Christian denominations have been approved to serve appointments or ecumenical ministries within the bounds of the Annual Conference while retaining their denominational affiliation (§331.8, 346.2)? (v) (Designate with an asterisk those who have been accorded voting rights within the annual conference. Indicate credential.)

Name	Clergy Status	Denomination

26. Who are affiliate members: (List alphabetically; indicate annual conference or denomination where membership is held.)

a) With vote (§586.4b [v])?

Name	Member Conference/Denomination	First Year of Affiliation

b) Without vote (§§334.5, 344.4)? (v 2/3)

Name	Member Conference/Denomination	First Year of Affiliation

NOTE: If your conference has admitted or ordained persons as a courtesy to another conference, list these persons in Question 40 only. If persons have been admitted or ordained by another annual conference as a courtesy to your conference, list these persons in Questions 27-39, whichever are appropriate, giving the date and name of the accommodating conference.

27. Who are elected as associate members? §322 (3/4v) (List alphabetically-see note preceding Question 27):

Name

28. Who are **elected** as provisional members and what seminary are they attending, if in school? (under §§322.4, 324, 325)

a) Provisional Deacons under the provisions of §§ 324.4a, c or §324.5(3/4v)

Name	Seminary

b) Provisional Elders under the provisions of §§ 324.4a, b or §324.6 (3/4v); § 322.4 (v 3/4)

Name	Seminary

29. Who are **continued** as provisional members, in what year were they admitted to provisional membership, and what seminary are they attending, if in school (§326, § 327 v)?

a) In preparation for ordination as a deacon or elder? (§326)

Name	Clergy Status	Date and Seminary

b) Provisional deacons who became provisional elders? (v)

Name	Original Year of Membership

c) Provisional elders who became provisional deacons? (v)(Indicate year)

Name	Original Year of Membership

d) Provisional members who transferred from other conferences or denominations? (§347.1) (v)

Name	Clergy Status	Original Year of Membership	Previous Conference or Denomination

30. What ordained clergy, coming from other Christian denominations, have had their orders recognized (§347.6): (v) **A person's orders may be recognized when they are transferring their membership into your annual conference from another Christian denomination. A person who is listed in Q.30 must also be listed in either Q. 31 a or b, depending on the transfer status.**

Name	Clergy Status	Previous Denomination

31. What ordained clergy have been received from other Christian denominations (§347.3): (List alphabetically—see note preceding Question 27):

a) As provisional members (§347.3c)? (v)

Name	Clergy Status	Date Received	Former Denomination

b) As local pastors (§347.3)? (v)

Name	Clergy Status	Date Received	Former Denomination

32. Who are elected as members in full connection? (List alphabetically-see note preceding Question 27. **Anyone appearing on this question must also be listed somewhere in questions 33-34 or 36, unless the clergy's orders from another denomination were recognized on question 30 in a previous year.**) (v 3/4):

a) Deacons

Name

b) Elders

Name

33. Who are ordained as deacons and what seminary awarded their degree? Or, if their master's degree is not from a seminary, at what seminary did they complete the basic graduate theological studies?: (List alphabetically-see note preceding Question 27)

a) After provisional membership (§330)? (v 3/4)

Name	Seminary

b) Transfer from elder?(§309) (v 3/4)

Name	Seminary

34. Who are ordained as elders and what seminary awarded their degree?

a) After provisional membership? (§335) (v 3/4)

Name	Seminary

b) Transfer from deacon? (§309) (v 3/4)

Name	Seminary

35. What provisional members, previously discontinued, are readmitted (§364)? (v)

Name	Clergy Status	Year Previously Discontinued

36. Who are readmitted (§§365-367 [v], §368 [v 2/3]):

Name	Clergy Status	Previous Status

37. Who are returned to the effective relationship after voluntary retirement (§357.7): (v)

Name	Clergy Status	Year Retired

38. Who have been received by transfer from other annual conferences of The United Methodist Church (§§347.1, 416.5, 635.2n)? (List alphabetically. Indicate credential. See note preceding Question 27.): (v)

Name	Clergy Status	Previous Conference	Date of Transfer

39. Who are transferred in from other Methodist denominations (§347.2)? (List alphabetically. Indicate credential.)

Name	Clergy Status	Previous Methodist Denomination	Date of Transfer

40. Who have been ordained as a courtesy to other conferences, after election by the other conference? (See note preceding Question 27. Such courtesy elections or ordinations do not require transfer of conference membership.)

a) Deacons?

Name	Member Conference

b) Elders?

Name	Member Conference

41. Who have been transferred out to other annual conferences of The United Methodist Church (§416.5)? (List alphabetically. Indicate credential. See note preceding Question 27.)

Name	Clergy Status	New Conference	Date of Transfer

42. Who are discontinued as provisional members (§327)? (v).

a) By expiration of eight-year time limit (§ 327)

Name	Clergy Status

b) By voluntary discontinuance (§ 327.6) (v)

Name	Clergy Status

c) By involuntary discontinuance (§ 327.6) (v)

Name	Clergy Status

d) By reaching Mandatory Retirement Age (§ 327.7)

Name	Clergy Status

43. Who are on location?

a) Who has been granted honorable location (§358.1)?

(1) This year? (v)

Name	Clergy Status	Charge Conference Membership	Date Effective

(2) Previously?

Name	Year Originally Granted	Charge Conference Membership	Year of Most Recent Report

b) Who on honorable location are appointed ad interim as local pastors? (§358.2) (Indicate date and appointment.)

Name	Appointment	Year Originally Granted Location

c) Who has been placed on administrative location (§359)?

(1) This year? (v)

Name	Date Effective	Charge Conference Membership

(2) Ad Interim Administrative Location (v)

Name	Date Effective	Charge Conference Membership

(3) Previously?

Name	Year Originally Placed	Charge Conference Membership	Year of Most Recent Report

44. Who have been granted the status of honorable location-retired (§358.3):

a) This year? (v)

Name	Clergy Status	Year Honorable Location Originally Granted	Charge Conference Membership

b) Previously?

Name	Clergy Status	Year Honorable Location Originally Granted	Charge Conference Membership

45. Who have had their status as honorably located and their orders terminated (§358.2)? (v)

Name	Date Effective	Prior Clergy Status

46. Who have had their conference membership terminated?

a) By withdrawal to unite with another denomination (§360.1, .4)? (v)

Name	Date Effective	Prior Clergy Status

b) By withdrawal from the ordained ministerial office (§360.2, .4)? (v)

Name	Date Effective	Prior Clergy Status

c) By withdrawal under complaints or charges (§§360.3, .4; 2719.2)?

Name	Date Effective	Prior Clergy Status

d) By termination of orders under recommendation of the Board of Ordained Ministry (§§ 358.2, 359.3)? (v)

Name	Date Effective	Prior Clergy Status

e) By trial (§2713)?

Name	Date Effective	Prior Clergy Status

47. Who have been suspended under the provisions of §362.1d, §2704.2c or §2711.3? (Give effective dates. Indicate credential.)

Name	Date Effective	Clergy Status

48. Deceased (List alphabetically)

a) What associate members have died during the year?

Active:

Name	Date of Birth	Date of Death

Retired:

Name	Date of Birth	Date of Death

b) What provisional members have died during the year? (Indicate credential.)

Active:

Name	Date of Birth	Date of Death

Retired:

Name	Date of Birth	Date of Death

c) What elders have died during the year?

Active:

Name	Date of Birth	Date of Death

Retired:

Name	Date of Birth	Date of Death

d) What deacons have died during the year?

Active:

Name	Date of Birth	Date of Death

Retired:

Name	Date of Birth	Date of Death

e) What local pastors have died during the year?

Active:

Name	Date of Birth	Date of Death

Retired:

Name	Date of Birth	Date of Death

49. What provisional or ordained members (elders and deacons) have received appointments in other Annual Conferences of The United Methodist Church while retaining their membership in this Annual Conference (§§331.8, 346.1)?

Name	Clergy Status	Conference Where Appointed	Appointment

50. Who are the provisional, ordained members or associate members on leave of absence and for what number of years consecutively has each held this relation (§353)? (Indicate credential. Record Charge Conference where membership is held.)

a) Voluntary?

(1) Personal, 5 years or less (§353.2a 3) (v)

Name	Clergy Status	Date Effective	Charge Conference

(2) Personal, more than 5 years (§353.2a 3) (v 2/3)

Name	Clergy Status	Date Effective	Charge Conference

(3) Family, 5 years or less (§353.2b 3) (v)

Name	Clergy Status	Date Effective	Charge Conference

(4) Family, more than 5 years (§353.2b 3) (v 2/3)

Name	Clergy Status	Date Effective	Charge Conference

(5) Transitional (§353.2c)

Name	Clergy Status	Date Effective	Charge Conference

b) Involuntary?

(1) Involuntary Leave (¶ 354)? (v 2/3)

Name		Clergy Status	Date Effective	Charge Conference

(2) Ad Interim Involuntary Leave (JCD 1355) (v)

Name	Clergy Status	Date Effective	Charge Conference

51. Who are granted sabbatical leave (¶351)? (v)

Name	Clergy Status	Date Effective	Charge Conference

52. Who have been granted medical leave due to medical or disabling conditions (¶356)? (v)

Name	Clergy Status	Date Effective	Charge Conference

53. What members in full connection have been retired (¶357): (List alphabetically. If retiring in the interim between conference sessions (¶357.2d), indicate the effective date of retirement.) (Under ¶357.1, no vote required; under ¶357.2, v; under ¶357.3, v 2/3)

Deacons

a) This year?

Name	Date Effective

b) Previously?

Name	Date Effective

Elders

c) This year?

Name	Date Effective

d) Previously?

Name	Date Effective

54. What associate members have been retired (¶357): (List alphabetically. If retiring in the interim between conference sessions (¶357.2d), indicate the effective date of retirement.) (Under ¶357.1, no vote required; under ¶357.2, v; under ¶357.3, v 2/3)

a) This year?

Name	Date Effective

b) Previously?

Name	Date Effective

55. What provisional members have been previously retired (§358, 2008 *Book of Discipline*)?

Name	Date Effective

56. Who have been recognized as retired local pastors (§320.5):

a) This year?

Name	Date Effective

b) Previously?

Name	Date Effective

57. What is the number of clergy members of the Annual Conference:

a) By appointment category and conference relationship?

(NOTES:

- (1) Where applicable, the question numbers on this report form corresponding to each category have been placed in parenthesis following the category title. Where these question numbers appear, the number reported in that category should agree with the number of names listed in the corresponding questions.
- (2) For the three categories of Appointments to Extension Ministries, report as follows:
 ¶344.1a, c): the number of clergy members appointed within United Methodist connectional structures, including district superintendents, or to an ecumenical agency.
 ¶344.1b): the number of clergy members appointed to extension ministries, under endorsement by the Division of Chaplains and Related Ministries of the General Board of Higher Education and Ministry.
 ¶344.1d): the number of clergy members appointed to other valid ministries, confirmed by a two-thirds vote of the Annual Conference.

Note: Report those in extension ministry in one category only.

See the Discipline paragraphs indicated for more detailed description of these appointment categories.)

Note: Those approved to serve as a local pastor, but not currently under appointment, are not counted as clergy members of the conference.

Categories	Deacons in Full Connection	Elders in Full Connection	Provisional Deacons	Provisional Elders	Associate Members & Affiliate Members With Vote	Full-time Local Pastors	Part-time Local Pastors
Pastors and deacons whose primary appointment is to a Local Church (¶331.1c, 339) (74)							

Deacons (in full connection and provisional) serving Beyond the Local Church (§331.1a, b) (77a,b)		xxxxx xxxxx xxxxx		xxxxx xxxxx xxxxx		xxxxx xxxxx xxxxx	xxxxx xxxxx xxxxx	xxxxx xxxxx xxxxx
Appointments to Extension Ministries (§316.1; 344.1a, c) (76a)	xxxxx xxxxx xxxxx		xxxxx xxxxx xxxxx					
Appointments to Extension Ministries (§316.1; 344.1b) (76b)	xxxxx xxxxx xxxxx		xxxxx xxxxx xxxxx					
Appointments to Extension Ministries (§316.1; 344.1d) (76c)	xxxxx xxxxx xxxxx		xxxxx xxxxx xxxxx					
Appointments to Attend School (§331.3) (79)							xxxxx xxxxx	xxxxx xxxxx
Appointed to Other Annual Conferences (49)							xxxxx xxxxx	xxxxx xxxxx
On Leave of Absence (50a1, a2)							xxxxx xxxxx	xxxxx xxxxx
On Family Leave (50a3, a4)							xxxxx xxxxx	xxxxx xxxxx
On Sabbatical Leave (51)							xxxxx xxxxx	xxxxx xxxxx
On Medical Leave (52)								
On Transitional Leave (50a5)							xxxxx xxxxx	xxxxx xxxxx
Retired (53, 54, 55)							xxxxx xxxxx	xxxxx xxxxx
Total Number, Clergy Members								
Grand Total, All Conference Clergy Members								

b) By gender and racial/ethnic identification? (NOTE: See the instruction for item 57 for guidelines to assist in the racial/ethnic identification count.)

<i>Clergy Demographics</i>															
Categories	Deacons in Full Connection		Elders in Full Connection		Provisional Deacons		Provisional Elders		Associate Members & Affiliate Members with Vote		Full-time Local Pastors		Part-time Local Pastors		
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	
Asian															
Black															
Hispanic															
Native American															
Pacific Islander															
White															
Multi-Racial															
Grand Total, All Conference Clergy Members*															

PART III CERTIFICATION IN SPECIALIZED MINISTRY

Note: Indicate credential of persons in Part III: FD, FE, PD, PE, AM, FL, PL, and LM.

58. Who are the candidates in process for certification in specialized ministry?

Name	Clergy/Lay Status	Specialized Ministry

59. Who is certified in specialized ministry? (List the areas of specialized ministry.)

Name	Clergy/Lay Status	Specialized Ministry

60. Who are transferred in as a certified person in specialized ministry?

Name	Clergy/Lay Status	Specialized Ministry	Sending Conference

61. Who are transferred out as a certified person in specialized ministry?

Name	Clergy/Lay Status	Specialized Ministry	Receiving Conference

62. Who have been removed as a certified person in specialized ministry?

Name	Clergy/Lay Status	Specialized Ministry

PART IV CERTIFIED LAY MINISTRY

(¶(¶ 268, and 666.10 *The Book of Discipline*)

63. Who are certified as lay ministers (¶ 268, and 666.10)? (List alphabetically, by district)

Name	District

PART V DIACONAL MINISTERS

(Paragraph numbers in questions 64-71 refer to *The 1992 Book of Discipline*)

64. Who are transferred in as diaconal ministers (¶312)?

Name	Previous Annual Conference	Date

65. Who are transferred out as diaconal ministers (¶312)?

Name	Previous Annual Conference	Date

66. Who have had their conference relationship as diaconal ministers terminated by Annual Conference action (§313.3)? (Under §313.3a, no vote; under §313.3b, v 2/3)

Name	Date Effective

67. What diaconal ministers have died during the year?

a) Effective:

Name	Date of Birth	Date of Death

b) Retired:

Name	Date of Birth	Date of Death

68. What diaconal ministers have been granted leaves of absence under §313.1a, c, d) (disability, study/sabbatical, or personal leave): (v)

Name	Type of Leave	Date Originally Granted

69. What diaconal ministers have been granted an extended leave (§313.1e):

Name	Date Originally Granted

70. Who have returned to active status from extended leave (§313.1e)? (v)?

Name	Date Originally Granted

71. Who have taken the retired relationship to the Annual Conference as diaconal ministers (§313.2): (Under §313.2b, v 2/3)

a) This year?

Name	Date Effective

b) Previously?

Name	Date Effective

PART VI APPOINTMENTS AND CONCLUDING BUSINESS

72. Who are approved for less than full-time service?

a) What associate members and elders (full and provisional) are approved for appointment to less than full-time service, what is the total number of years for which such approval has been granted to each, and for what fraction of full-time of service (in one-quarter, one-half, or three-quarter increments) is approval granted (§§338.2, 342.2, 1506)? (v 2/3, after 8 years v 3/4):

Name	Appointment	Fraction of Full-Time Service

- b) What deacons in full connection and provisional deacons are approved for appointment to less than full-time service (§331.7)?

Name	Appointment	Fraction of Full-Time Service

73. Who have been appointed as interim pastors under the provisions of §338.3 since the last session of the annual conference, and for what period of time?

Name	Appointment	Start Date	End Date

74. What elders, deacons (full connection and provisional), associate members, local and supply pastors are appointed to ministry to the local church and where are they appointed for the ensuing year? (Attach a list.)

75. What changes have been made in appointments since the last annual conference session? (Attach list. Include and identify Appointments Beyond the Local Church (Deacons) and Appointments to Extension Ministries (Elders). Give effective dates of all changes.)

76. What elders (full connection and provisional), associate members, and local pastors are appointed to extension ministries for the ensuing year? (Attach a list)

- a) Within the connectional structures of United Methodism (§344.1a, c)?

Name	Clergy Status	Date Effective	Extension Ministry Assignment	Charge Conference

- b) To ministries endorsed by the Board of Higher Education and Ministry (344.1b)?

Name	Clergy Status	Date Effective	Extension Ministry Assignment	Charge Conference

- c) To other valid ministries under the provisions of §344.1d? (v 2/3)

Name	Clergy Status	Date Effective	Extension Ministry Assignment	Charge Conference

77. Who are appointed as deacons (full connection and provisional) for the ensuing year? (Attach a list.)

- a) Through non-United Methodist agencies and settings beyond the local church (§331.1a)?

Name	Clergy Status	Date Effective	Extension Ministry Assignment	Charge Conference

- b) Through United Methodist Church-related agencies or schools within the connectional structures of The United Methodist Church (§331.1b)?

Name	Clergy Status	Date Effective	Extension Ministry Assignment	Charge Conference

78. Who are appointed to attend school (§416.6)? (List alphabetically all those whose prime appointment is to attend school.)

Name	Clergy Status	School

79. Where are the diaconal ministers appointed for the ensuing year (§310) [**1992 Discipline**]? (Attach list)

80. What other personal notations should be made? (Include such matters as changes in pension credit (§1506.5), corrections or additions to matters reported in the "Business of the Annual Conference" form in previous years, and legal name changes of clergy members and diaconal ministers.)

81. Where and when shall the next Conference Session be held (§603.2, 3)?