

District Appointive Process Timeline & Checklist
Info for Districts 2018

Items in purple are checklist

**ALL APPOINTMENTS ARE CONSIDERED "PROJECTED" AND SHOULD REMAIN CONFIDENTIAL
UNTIL ANNOUCEMENT SUNDAY**

- Nov. 2017**
- Send out SPRC & Clergy discerning emails/letters with appointment advisory form. Deadline for submission is January 15 or district-specified earlier date
 - Create moves tracker spreadsheet, if using
- Dec. 2017
- Pastors and SPRC Chairs anticipating a change in appointment begin DS consultation (DS discretion: For church-initiated moves, DS may meet with SPRC Chair and pastor separately; for DS-initiated moves, DS may meet with SPRC chair only)
- Dec. 11, 2017 to January 31, 2018**
- Pastor and Church Profiles available online for annual update. Deadline for completion is January 31, 2018.
- December 4-5, 2017
- Cabinet has pre-appointment-making session (11 am to 11 am, Sarasota)
- December 11, 2017**
- Bishop's office sends Supply & Demand worksheets to Districts

2018

- January**
- DS continues consultations with SPRC & Pastors requesting move
- Begin creating compilation of info for DS to bring to Cabinet meetings (SPRC contact list, clergy comp reports, church & clergy profiles, Apportionments/Health & Benefits/Ministry Protection compilation report, Mission Insite Summary, MVS summary) if using
- January 11**
- Deadline for Districts to submit COMPLETE AND ACCURATE Supply & Demand worksheets to Bishop's office**
- January 15
- Deadline for Pastors and SPRCs anticipating a move to contact DS for an appointment (earlier if specified by DS)
FORMS: *Pastor's Appointment Advisory to the Bishop and Cabinet, SPRC Appointment Advisory to the Bishop and Cabinet*
- January 31
- Deadline for Church and Pastor Profile update (Jan. 15 if requesting a move, or earlier if specified by DS)
- January – Feb. 5
- DS meets with those SPRCs where there is an anticipated change in appointment.
- February 7-9
- Cabinet appointment-making session – Lakeland
- February-April**
- Identify if church will need charge conference for salary change
 - Send info to SPRC at least one week prior to announcement Sunday
Information for Trustees Regarding Pastor Moving (SPRC to give to Trustees)
Information for SPRC Regarding Pastor Moving and/or Retiring
- March 5-8
- Cabinet appointment-making session – St. Augustine
- March 9
- DS begins meeting or calling Pastors and SPRCs where there is a projected move. (DS Discretion: These meetings will be scheduled once the cabinet has approved the appointment and the new pastor has been contacted. DS will then meet with the SPRC chair or committee. It may be preferable that the church come to the DS's office.)
- April 17
- Cabinet final Appointment-making session

- April 29** Announcement Sunday
- April 30 – June Newly-appointed pastors visit new church
- March – May**
- DS Advisory Pastor File, if using
 - Create a file for each incoming Pastor for DS to use when meeting or working with them.
- April – May**
- Send incoming pastor letter
 - Send out the following forms for completion:
 - Pastor Compensation
 - Housing Resolution
 - Accountable Reimbursement
 - Clergy Contact information update
 - Send out the following forms for completion by the clergy: (optional to do in July)
 - If new clergy, Employee Conduct Policy
 - Divorce policy, if not on file in eBridge
 - I-9 – church to complete and send copy to District
 - Request New Clergy email (@flumc.org) from dataupdates@flumc.org
 - Ensure all outgoing clergy information is scanned into e-Bridge
- April 30** Posting of Full-time Appointments on Conference website
- May 13 Deadline for new Clergy Compensation form to be turned in to the district office (only for those churches that are having a change in pastors effective July 1, 2018)
- May 31 MANDATORY Right Start Training – For all clergy moving in July
(10am-4pm, First UMC Lakeland)
- June 1 MANDATORY Right Start Training New Clergy to the Florida Conference: First Time Appointments
Sexual Ethics, New Clergy Orientation, Health Benefits, Pensions, Clergy Taxes
(9am – 5pm)
- June 7-9 Annual Conference, Lakeland; Appointments set on June 9 by Bishop Carter
- June**
- Updates to Ezra (3rd week of June) *It is important NOT to do updates until after AC*
 - If they are brand new clergy, give them an assignment of “New Clergy” (with the date you are entering them and an end date of 06/30/2018).
 - Enter Compensation & Approve – effective date July 1, 2018 (unless starting at different time)
 - Enter new appointment 7/1/2018 and end current appointment 6/30/2018
 - End any old District Committee or Church Assignments
 - Update Home District
 - Mailing Address (Church Address)
 - Home Address
 - Home Phone
 - Church Phone
 - Cell Phone
 - Church Fax
 - Family member records: spouse kids, birthdates
- June 26** Moving Day
- June-July**
- Send retiring clergy letter thanking them for their service and reminding them to not interfere with the new pastor’s ministry

July 1

New Pastors first Sunday at new church

July 2

- Double-check website to confirm all clergy appointments were updated in the clergy locator. If not, contact Steve to make changes.
- Send out the following forms for completion by the clergy: (if not done in spring) and file in eBridge once received
 - If new clergy, Employee Conduct Policy
 - Divorce policy, if not on file in eBridge
 - I-9 – church to complete and send copy to District

Optional:

- District Directory
- Clergy Peer or Cluster Group Assignments (DS specifies)
- DS contact list in Outlook
- Birthday List

Updated 10/10/17