

Upper New York Annual Conference 2022-2023 ANNUAL REPORT FORM CHECK LIST

Date of Charge Conference: _____

Church: _____ Pastor: _____

Forms available on www.UNYUMC.ORG website, click on Church/Charge Conference forms link

The Church is to Provide Copy of ___ 2021 Audit & ___ Approve 2021 Charge Conference Minutes

REQUIRED FORMS FROM EVERY CHURCH TO HAVE A CHARGE CONFERENCE:

DUE Two (2) weeks Prior to Church/Charge Conference (Email or snail mail to District Office)

1. ___ Disciple-Making Pathway
2. ___ Church Outreach & Volunteers In Mission
3. ___ Report of Pastor
4. ___ Imagine No Racism (complete online at <https://bit.ly/INRform>)
5. ___ **2023 Active** Clergy Compensation Form with excel worksheet
- 5a. ___ Clergy Housing Exclusion Resolution
- 5b. ___ ARP Resolution (accountable reimbursement) **Only New Appointment/Change of Appointment**
- 5c. ___ **2023 Retired/Lay Supply** Clergy Compensation Form with excel worksheet
6. ___ Trustee Election Ballot
7. ___ Local Church Leadership Interface & Nominations/Personnel (your own) **print in landscape layout**
8. ___ Safe Sanctuary Compliance Report
9. ___ Accessibility Audit (~~due in the odd calendar year~~)

FORMS If Applicable:

10. ___ Declaration of Candidacy for Licensed/Ordained Ministry
11. ___ Certified Lay Ministers
12. ___ Certified Lay Servant
13. ___ Lay Speaker
14. ___ Bequest Resolution (if applicable)
15. ___ Retired Clergy in the church (if applicable) ¶ 357.5
16. ___ Parsonage Inspection & Committee

DUE at Church/Charge Conference (these DO NOT leave the building)

17. ___ Church/Charge Conference Minutes (with any attachments)
18. ___ Church/Charge Conference Sign-In-Sheet (print in landscape layout)

Due by November 1st (complete online) & **print and mail signed copy** to District Office)

- ___ Pastor's Appointment Advisory Form* (complete at <https://uny.umcprofile.org>)
- ___ S/PPRC Appointment Advisory Form*(complete at <https://uny.umcprofile.org>)
- ___ Pastor-S/PPRC Covenant Form* (complete at <https://uny.umcprofile.org>)

Due by December 1st (Update online- **DO NOT** print copy)

- ___ Church Profile * (complete at <https://uny.umcprofile.org>)
- ___ Pastor's Profile *(complete at <https://uny.umcprofile.org>)

Due by February 15th, 2023 (mail completed & **signed** copy of each to the District Office)

- ___ Report of Trustees
- ___ Report of Finance Committee
- ___ 2022 Year End Financial Report- your church format
- ___ 2023 Church Budget- your church format
- ___ 2022 Statistical Reports* (complete at <http://ezra.gcfa.org>)

Due by March 15th, 2023:

- ___ 2022 Local Church Annual Financial Audit

*For help logging into uny.umcprofile.org or ezra.gcfa.org please contact your District Office