

# Upper New York Annual Conference 2023-2024 ANNUAL REPORT FORM CHECK LIST

Date of Charge Conference: \_\_\_\_\_

Church: \_\_\_\_\_ Pastor: \_\_\_\_\_

Forms available on <https://www.unyumc.org/news/charge-conference> website, click on Charge Conference

The Church is to Provide Copy of \_\_\_ 2022 Audit & \_\_\_ Approve 2022 Charge Conference Minutes

## REQUIRED FORMS FROM EVERY CHURCH TO HAVE A CHARGE CONFERENCE:

### DUE August 25, 2023

\_\_\_ Clergy Profile, Supervisory, Appointment Advisory Form\* (complete at <https://uny.umcprofile.org>)

### DUE September 20, 2023

\_\_\_ Nominations/Personnel (your own)

\_\_\_ **2024 Active** Clergy Compensation Form with excel worksheet

\_\_\_ Clergy Housing Exclusion Resolution

\_\_\_ ARP Resolution (accountable reimbursement) **Only New Appointment/Change of Appointment**

\_\_\_ **2024 Retired/Lay Supply** Clergy Compensation Form

\_\_\_ Declaration of Candidacy for Licensed/Ordained Ministry

\_\_\_ Certified Lay Ministers Annual Report

\_\_\_ Certified Lay Servant Annual Report

\_\_\_ Lay Speaker Annual Report

### DUE 15 days Prior to Church/Charge Conference (Email or snail mail to District Office)

1. \_\_\_ Church Outreach & Volunteers In Mission

2. \_\_\_ Report of Pastor

3. \_\_\_ Imagine No Racism (complete online at <https://bit.ly/INR2024> )

4. \_\_\_ Trustee Election Ballot

5. \_\_\_ Local Church Leadership Interface **print in landscape layout**

6. \_\_\_ Safe Sanctuary Compliance Report

7. \_\_\_ Accessibility Audit (**due in the odd calendar year**)

### **FORMS If Applicable:**

8. \_\_\_ Bequest Resolution

9. \_\_\_ Retired Clergy in the church ¶ 357.5

10. \_\_\_ Parsonage Inspection & Committee

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

11. \_\_\_ Church/Charge Conference Minutes (with any attachments) **Make sure signatures are included**

12. \_\_\_ Church/Charge Conference Sign-In-Sheet (**print in landscape layout**)

### Due by November 1<sup>st</sup> (complete online) & **print and mail signed copy** to District Office)

\_\_\_ Congregational Profile & Appointment Advisory Form\*(complete at <https://uny.umcprofile.org>)

\_\_\_ Pastor-S/PPRC Covenant Form\* (complete at <https://uny.umcprofile.org>)

### Due by February 15<sup>th</sup>, 2024 (mail completed & **signed** copy of each to the District Office)

\_\_\_ Report of Trustees

\_\_\_ Report of Finance Committee

\_\_\_ 2023 Year End Financial Report- your church format

\_\_\_ 2024 Church Budget- your church format

\_\_\_ 2023 ACStats-Statistical Reports\* (complete at <https://stats.gcfa.org/> )

### Due by March 15<sup>th</sup>, 2024:

\_\_\_ 2023 Local Church Annual Financial Audit

*\*For help logging into uny.umcprofile.org or ACStats please contact your District Office*