

**Upper New York Annual Conference
2016-17 ANNUAL REPORT FORM CHECK LIST**

Church: _____ **Pastor:** _____

Date and Location of Church/Charge Conference: _____

☞ = Form available on www.UNYUMC.ORG website, click on *Church/Charge Conference Forms* link

Due Two (2) Weeks Prior to Church/Charge Conference (mail to District Office) Date Completed

1. 2017 Clergy Compensation Report Form with excel worksheet ☞ _____

1a. Housing Exclusion Resolution - *sample* (if applicable) ☞ _____

1b. Accountable Reimbursement Plan Resolution - *sample* (if applicable) ☞ _____

NOTE: For information related to report worksheet and resolutions above, please visit:

<http://www.unyumc.org/comppackage>

2. Local Church Lay Leadership:

2a. Nominations & Leadership Development Report (using your church's format) _____

2b. Trustee Election Ballot Template (for use at Charge Conference) ☞ _____

2c. Local Church ~ UNYAC Leadership Interface ☞ _____

3. Report of the Pastor ☞ _____

4. a. Volunteers in Mission & Outreach Report ☞ _____

b. Safe Sanctuary Compliance Form ☞ _____

5. 2015 Audit _____

As Applicable:

6. Lay Servant Annual Report ☞ _____

7. a. Parsonage Committee Report ☞ (for each parsonage, even if rented/leased) _____

7. b. Parsonage Inspection Form ☞ _____

8. Recommendation of Candidate for Licensed/Ordained Ministry ☞ _____

9. Bequest Resolution - *sample* ☞ _____

Due Two Weeks Following Church/Charge Conference (mail to District Office):

10. Church/Charge Conference Minutes (with attachments) ☞ _____

11. Church/Charge Conference Sign-In Sheet ☞ _____

Due by November 1, 2016 (Complete online, print and mail signed copy to District Office):

12. Pastor's Appointment Advisory Form (complete at <http://uny.umconline.org>) ☞ _____

13. S/PPRC Appointment Advisory Form (complete at <http://uny.umconline.org>) ☞ _____

14. Pastor - S/PPRC Covenant Form (complete at <http://uny.umconline.org>) ☞ _____

Due by December 1, 2016 (Do not mail printed copy -- just update online):

15. Church Profile* (complete at <http://uny.umconline.org>) _____

16. Pastor's Profile* (complete at <http://uny.umconline.org>) _____

Due by February 15, 2017 (Mail completed copy of each to District Office)

17. Report of the Trustees ☞ _____

18. Report of the Finance Committee ☞ _____

2016 Year End Financial Report (your format) _____

2017 Church Budget (your format) _____

19. 2016 Statistical Reports* (complete at <http://ezra.gcf.org>) _____

Due by March 15, 2017 (Mail completed copy to District Office)

20. 2016 Local Church Annual Financial Audit ☞ Will be available _____

here by October 1, 2016.

*For help logging into uny.umconline.org or ezra.gcf.org please contact your district office.