

Upper New York Annual Conference
2017-18 ANNUAL REPORT FORM CHECK LIST

Church: _____ Pastor: _____

Date & 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)

1. _____ 2018 Clergy Compensation Report with excel worksheet
- 1a. _____ Housing Exclusion Resolution
- 1b. _____ ARP(accountable reimbursement plan) if applicable

Local Church Lay leadership:

2. _____ Trustee Election Ballot
- 2a. _____ Lay Leadership Team (Nominations, Leadership & Personnel) your church format
3. _____ Recommendation of Candidate for Licensed/Ordained Ministry (if applicable)
4. _____ Certified Lay Ministers Report (if applicable)
5. _____ Certified Lay Servant
6. _____ Lay Speaker Reports (if applicable)
7. _____ Bequest Resolution (if applicable)
8. _____ 2016 Audit & _____ Charge Conference Minutes
9. _____ Report of Pastor & _____ Reports of other Retired Clergy in the church (if applicable)
10. _____ Parsonage Inspection & Committee Report (if applicable)
11. _____ Outreach & Volunteers In Mission Report
12. _____ Safe Sanctuary Compliance Form
13. _____ Accessibility Report Form (**due in the odd calendar year**)

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

14. _____ Church/Charge Conference Minutes (with any attachments)
15. _____ Church/Charge Conference Sign-In-Sheet

DUE Two (2) weeks After Church/Charge Conference

16. _____ Leadership Interface Sheet

Due by November 1, 2017 (complete online, print and mail signed copy to District Office)

17. _____ Pastor's Appointment Advisory Form* (complete at <http://uny.umconline.org>)
18. _____ S/PPRC Appointment Advisory Form*(complete at <http://uny.umconline.org>)
19. _____ Pastor-S/PPRC Covenant Form* (complete at <http://uny.umconline.org>)

Due by December 1, 2017 (Update online- **DO NOT** print copy)

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

Due by February 12, 2018 (mail completed & signed copy of each to the District Office)

22. _____ Report of Trustees
23. _____ Report of Finance Committee
- 23a. _____ 2017 Year End Financial Report
- 23b. _____ 2018 Church Budget
24. _____ 2017 Statistical Reports* (complete at <http://ezra.gcfa.org>)

Due by March 12, 2018

25. _____ 2017 Local Church Annual Audit

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