

*Upper New York Annual Conference*  
**2019-2020 ANNUAL REPORT FORM CHECK LIST**

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

Date & Location of Church/Charge Conference: \_\_\_\_\_

Forms available on [www.UNYUMC.ORG](http://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. \_\_\_\_\_ 2020 Clergy Compensation Form with excel worksheet
- 1a. \_\_\_\_\_ Clergy Housing Exclusion Resolution
- 1b. \_\_\_\_\_ ARP Resolution (accountable reimbursement plan) if applicable

**Local Church Lay leadership:**

2. \_\_\_\_\_ Trustee Election Ballot
- 2a. \_\_\_\_\_ Lay Leadership Team (Nominations, Leadership & Personnel) your church format
- 2b. \_\_\_\_\_ Local Church –UNYAC Leadership Interface Sheet (print in landscape layout)
3. \_\_\_\_\_ Declaration of Candidacy for Licensed/Ordained Ministry (if applicable)
4. \_\_\_\_\_ Annual Report-Certified Lay Ministers Report (if applicable)
5. \_\_\_\_\_ Annual Report-Certified Lay Servant (if applicable)
6. \_\_\_\_\_ Annual Report-Lay Speaker Reports (if applicable)
7. \_\_\_\_\_ Bequest Resolution (if applicable)
8. \_\_\_\_\_ 2018 Audit & \_\_\_\_\_ 2018 Charge Conference Minutes
9. \_\_\_\_\_ Report of Pastor
- 9a. \_\_\_\_\_ Reports of other Retired Clergy in the church (if applicable) ¶ 357.5
10. \_\_\_\_\_ Parsonage Inspection & Committee Report (if applicable)
11. \_\_\_\_\_ Volunteers In Mission & Outreach Report
12. \_\_\_\_\_ Safe Sanctuary Compliance Report
13. \_\_\_\_\_ Annual Accessibility Audit (**due in the odd calendar year**)
14. \_\_\_\_\_ 2019 INR Charge Conference Question Form
15. \_\_\_\_\_ 2019 “Do You Have a Disciple Making Pathway Process/Plan?”

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

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

**Due by November 1, 2019** (complete online, **print and mail signed copy** to District Office)

18. \_\_\_\_\_ Pastor’s Appointment Advisory Form\* (complete at <http://uny.umconline.org>)
19. \_\_\_\_\_ S/PPRC Appointment Advisory Form\*(complete at <http://uny.umconline.org>)
20. \_\_\_\_\_ Pastor-S/PPRC Covenant Form\* (complete at <http://uny.umconline.org>)

**Due by December 1, 2019** (Update online- **DO NOT** print copy)

21. \_\_\_\_\_ Church Profile \* (complete at <http://uny.umconline.org>)
22. \_\_\_\_\_ Pastor’s Profile \*(complete at <http://uny.umconline.org>)

**Due by February 15, 2020** (mail completed & **signed** copy of each to the District Office)

23. \_\_\_\_\_ Report of Trustees
24. \_\_\_\_\_ Report of Finance Committee
- 24a. \_\_\_\_\_ 2019 Year End Financial Report- your church format
- 24b. \_\_\_\_\_ 2020 Church Budget- your church format
25. \_\_\_\_\_ 2019 Statistical Reports\* (complete at <http://ezra.gcfa.org>)

**Due by March 15, 2020**

26. \_\_\_\_\_ 2019 Local Church Annual Financial Audit

*\*For help logging into [uny.umconline.org](http://uny.umconline.org) or [ezra.gcfa.org](http://ezra.gcfa.org) please contact your District Office*