

Upper New York Annual Conference
2018-2019 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. _____ 2019 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
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. _____ 2017 Audit & _____ 2017 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 and Outreach Report
12. _____ Safe Sanctuary Compliance Report
13. _____ Annual Accessibility Audit (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 by November 1, 2018 (complete online, print and mail signed copy to District Office)

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

Due by December 1, 2018 (Update online- DO NOT print copy)

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

Due by February 15, 2019 (mail completed & signed copy of each to the District Office)

21. _____ Report of Trustees
22. _____ Report of Finance Committee
- 22a. _____ 2018 Year End Financial Report- your church format
- 22b. _____ 2019 Church Budget- your church format
23. _____ 2018 Statistical Reports* (complete at <http://ezra.gcfa.org>)

Due by March 15, 2019

24. _____ 2018 Local Church Annual Financial Audit

Due 2 Weeks After Your Charge Conference

25. _____ 2018 "Do You Have a Disciple Making Pathway/Process/Plan?"
26. _____ INR Charge Conference Question Form

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