

Upper New York Annual Conference
2020-2021 ANNUAL REPORT FORM CHECK LIST (COVID-19)

Church: _____ Pastor: _____

Date & Location of Church/Charge Conference: _____

Forms 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. _____ 2021 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. _____ 2019 Audit & _____ 2019 Charge Conference Minutes (**have on hand**)
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. _____ 2020 INR Charge Conference Question Form
15. _____ 2020 “Do You Have a Disciple Making Pathway Process/Plan?”

DUE at Church/Charge Conference (Send to District Office)

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

Due by November 1, 2020 (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, 2020 (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, 2021 (mail completed & **signed** copy of each to the District Office)

23. _____ Report of Trustees
24. _____ Report of Finance Committee
- 24a. _____ 2020 Year End Financial Report- your church format
- 24b. _____ 2021 Church Budget- your church format
25. _____ 2020 Statistical Reports* (complete at <http://ezra.gcfa.org>)

Due by March 15, 2021

26. _____ 2020 Local Church Annual Financial Audit- For an Audit Guide Booklet go to <https://www.gcfa.org/media/2147/local-church-audit-guide-2020.pdf>

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