

Annual Report of a Parish, Mission or Chapel

*for the year ending 31 December 2022*

*Due Date: March 1, 2023*

Name of Congregation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This Annual Report, as required by Diocesan Canon 23.1, is due to the Office of the Bishop of Louisiana not earlier than 1 January 2023 and no later than 1 March 2023. We ask that you complete and return this to us by March 1, 2023. Please mail a completed packet to:

The Canon to the Ordinary

The Diocese of Louisiana

1623 Seventh Street

New Orleans, LA 70115

**PLEASE COMPETE EACH OF THE FOLLOWING 9 PARTS OF THE ANNUAL REPORT**

**PART 1:** The Parochial Report (enclosed) is required by the Canons of the Episcopal Church. *Please return the completed form to the Bishop’s office with your Annual Report*.

In addition to a printed Parochial Report being a part of this Annual Report to the Bishop, each congregation is required to file the Parochial Report with the office of the General Convention. That filing may be done online at https://reports.dfms.org/[,](http://pr/dfms.org,) beginning **2 January 2023** by using the Login name and Password chosen by your church. Workbooks to assist in the completion of the Parochial Report may be found online at [www.edola.org](http://www.edola.org) under Resources or at https://www.generalconvention.org/forms-and-instructions . If you have questions, you may also contact the Rev. Canon Morgan MacIntire at [mmacintire@edola.org](mailto:mmacintire@edola.org) or by calling 504-895-6634.

It is possible to view and print an 11-year trend chart that displays average Sunday attendance, active baptized members and plate and pledge gifts for your church (and all Episcopal congregations and dioceses.) To access this chart go to https://www.episcopalchurch.org/research-and-statistics/.

***Parochial Report (a) completed, (b) filed online and (c) included: Yes\_\_\_\_\_ No\_\_\_\_\_\_***

**PART 2:** Financial Statements

Please enclose all financial statements (balance sheets and income statements) associated with your Parish, Mission, or Chaplaincy (including schools, day care centers, etc.) for the twelve-month period ending 31 December 2022.

***Financial Statements included: Yes\_\_\_\_\_ No\_\_\_\_\_\_***

**PART 3:** Audits

Diocesan Canon 25.1.(d) requires that “all accounts shall be audited annually by a Certified Public Accountant, or by an accounting committee approved by the Vestry.” Please enclose the congregation’s audit report(s) for the twelve-month period ending 31 December 2022.

For congregations with a Normal Operating Income of less than $500,000.00, the Executive Board has authorized the use of an *Alternative Audit Procedure*. If you have questions about the proper use of this alternative procedure, please contact the Canon to the Ordinary or the Diocesan Treasurer. CPA Audit Reports and Alternative Audit Reports are due **September 27, 2023**.

***CPA Audit Report included: Yes\_\_\_\_\_ N/A\_\_\_\_\_***

***CPA Audit in process, to be forwarded when complete:******Yes\_\_\_\_\_ N/A\_\_\_\_\_***

***Alternative Audit Procedure Report completed and included: Yes\_\_\_\_\_ N/A\_\_\_\_\_***

***Alternative Audit Procedure Report in process: Yes\_\_\_\_\_ N/A\_\_\_\_\_***

**PART 4:** Discretionary Fund Certification

Clergy “Discretionary Funds” are church-owned funds utilized by clergy for pious and charitable purposes to relieve the indigent and to provide for parishioners in need. They are established by national canon (Title III Canon 9.5) for this purpose. They are to be independently reviewed on a quarterly basis in such a way as to insure both the proper use and confidentiality of monies.

Please enclose a letter from the vestry (signed by the Senior Warden) certifying that all such funds for the twelve-month period ending 31 December 2022 have been reviewed, and the procedures outlined in the Diocesan Policy on Clergy Discretionary Funds have been and are being followed.

***Discretionary Fund Certification included: Yes\_\_\_\_\_ N/A\_\_\_\_\_\_***

**PART 5:** Background Checks and Boundaries Training

To insure a safe environment for our parishioners and visitors, and with the advice of the Church Insurance Company, the Bishop and Executive Board have set as policy a requirement that all clergy and lay staff (church and school) undergo criminal, credit and DMV background checks. More information can be found by reading the Diocesan Safeguarding Policy, which can be found at http://www.edola.org/safeguarding, and complete a session of the *Safe Church/ Safe Communities* training.

Please provide a list of the names of those *who have and who have not* had these checks and training.

***Background and Training list included: Yes\_\_\_\_\_ No\_\_\_\_\_\_***

**PART 6:** Contact Information

Please provide the names of the members of your congregation’s staff and Vestry, as well as contact information for the members of the Vestry (mailing address, telephone number, email address.) Please email a copy to Jessica Lee (jlee@edola.org)

Please email a listing of active members of the congregation, in Excel format, to Joy Shackelford (jshackelford@edola.org). Column headings should include (a) Name, (b) Mailing Address, (c) Email Address, (d) Baptism Date, (e) Confirmation Date, (f) Marital Status, and (g) Adult (18+) or Child Status

***Staff and Vestry Listing included: Yes\_\_\_\_\_ No\_\_\_\_\_\_***

***Membership Listing emailed to*** [***jshackelford@edola.org***](mailto:jshackelford@edola.org) ***Yes\_\_\_\_\_ No\_\_\_\_\_\_***

**PART 7:** Termite Coverage

Please provide proof of termite coverage for all buildings under the control of your congregation, as well as the date(s) of the most recent treatment.

***Termite coverage included: Yes\_\_\_\_\_ No\_\_\_\_\_\_***

**PART 8:** Miscellaneous Documentation that has ***changed since the previous year***

***“In-force” letter from insurance provider(s)***

***clearly stating coverages, limits, & naming the***

***Diocese as an additional insured included:***  ***Yes\_\_\_\_\_ No new letter\_\_\_\_\_***

***Letter(s) of Agreement signed in 2022***

***with members of the clergy included:*** ***Yes\_\_\_\_\_ No new LoAs\_\_\_\_\_***

***Congregational Disaster Plan included: Yes\_\_\_\_\_ No\_\_\_\_\_***

***All new keys to church buildings included:*** ***Yes\_\_\_\_\_ No new keys\_\_\_\_\_***

**PART 9: PARISHES ONLY**

***Corporate Status in Louisiana current with the Secretary of State,***

***and documentation thereof included Yes\_\_\_\_\_ No\_\_\_\_\_\_***

(This may be found online and printed at

<https://coraweb.sos.la.gov/CommercialSearch/CommercialSearch.aspx>)

***Changes made in 2022***

***to Articles of Incorporation included Yes\_\_\_\_\_ No changes made\_\_\_\_\_***

(Note: Diocesan Canons require permission from the Bishop

be granted in advance of any changes to Articles of Incorporation)

***Changes made in 2022***

***to By-Laws included Yes\_\_\_\_\_ No changes made\_\_\_\_\_***

\* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \*

Date Completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rector / Vicar / Chaplain / Priest-in-Charge

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Senior Warden

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Treasurer

\* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \* \*

*To be completed by the office of the Bishop of Louisiana*

Date Received:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_