



The Diocese of Easton

The Episcopal Church in Eastern Maryland

Vestry Annual Calendar

January (or whenever there is a change)

- Update clergy pay with Church Pension Group
- Provide diocesan office with updates on vestry members

January

- Update monthly (or quarterly) apportionment check to new amount
- Provide employees with copies of IRS form W-2 and file with federal & state government
- File annual IRS forms 1099 for vendors paid \$600 or more for services (not goods)
- Elect delegates and alternates for diocesan convention – send credentials to diocese

February – Diocesan pre-convention convocation meeting

March 1st – Parochial Reports are due to The Episcopal Church

March – Annual diocesan convention

April – Annual diocesan clergy conference and retreat

May – Complete annual worker's compensation payroll audit for Church Insurance

September 1st – Parish audits are due to the diocese

August, September, October – Annual Enrollment for health insurance

Mid-September – Diocesan office sends apportionment letters for following year

Mid-October – Parish apportionment *estimates* are due back to the diocese

December

- Parish apportionment final *commitments* are due back to the diocese
- Diocese emails imputed income for inclusion on clergy W-2
- Last apportionment check before updating to the new amount in January
- Approve clergy housing allowance resolution for the coming year
- Diocesan pre-convention informational meeting



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Annual Checklist

- Check CPG.org and update parish administrators or bill payers if needed
- Mutual Ministry Review between Clergy and Vestry
- Verify all Lay and Clergy leaders have been Safe Church trained within the past 3 years
- Remind clergy to pay annual Corporation dues