

# Best practices and guidelines for Annual Meetings - Episcopal Diocese of New York

## Background:

The Episcopal Church is by our polity a representational democracy. We elect our leaders at all levels of our organizational structure, and that structure is set up to balance between lay and clergy on the parish/diocesan level and between delegates and bishops on the churchwide level. Following clear and regular practices for these elections allows us to maintain the balance that best fulfils the values of our democratic process.

## What is a Congregation Annual Meeting and what should happen there?

The Annual Meeting is the time in which all members in good standing of a congregation gather to conduct the business of the parish. There are several items of business that should be discussed at an Annual Meeting:

- The closing financials for the prior year should be presented, with opportunity for discussion and questions.
- The Annual budget for the current year should be presented with opportunity for discussion and questions from the congregation. **It is the canonical duty of the vestry to produce the budget and to approve it before the Annual meeting.** At the meeting itself the budget should be presented in such a manner that changes, challenges, and opportunities are clear to members of the congregation.
- New Vestry is elected. A slate of candidates for open vestry spots should be made available in advance of the Annual Meeting for members of the congregation to review, with election held at the annual meeting. Vestry members are the elected representatives of the congregation, empowered to care for the business of the congregation throughout the year. Depending on the practice of the individual congregation wardens may also be elected at this time, or chosen from the elected vestry.
- Delegates and Alternates are elected for Diocesan Convention. Just as a parish's Annual Meeting is the meeting of all members to do the business of the congregation to include elect representative leaders, the Annual Diocesan Convention is the annual gathering of all the congregations of the Diocese to do the business of the diocese. All active clergy resident in the Diocese are automatically delegates to convention, but each parish must elect one or more delegates to represent that parish from the lay order. This is most appropriately done at the Annual Meeting.
- If the congregation publishes an Annual Report, this should be completed and available by the Annual Meeting.

- Annual meetings are also an excellent time to celebrate the accomplishments of the year that has just passed. This is a great opportunity to gather data from the congregation about key developmental topics, to celebrate special leaders, and to mark the sunsetting or starting of ministries within the church.

## Introducing the Annual Leadership Report

Beginning this year, 2026, the Bishop's Office will be asking each congregation to fill out a congregational leadership report, available online, before the end of the first quarter. This report will collect information about the leadership in each parish, to include key paid and volunteer staff as well as elected leadership. This will include the names and contact information for your elected delegates and alternates to the 2026 diocesan convention. This will help us meet canonical obligations and deadlines for the certification of lay delegates as well as increase the knowledge and preparedness of lay delegates by communicating with them much sooner and more reliably as convention approaches. We will send out this online form around the same time that Parochial Reports are due.

## Basic Checklist:

- ☐ Check church bylaws to see if there are specific bylaws governing any of the following:
  - ☐ Annual meetings
  - ☐ Vestry member elections, number of vestry members
  - ☐ Warden elections and number of wardens
  - ☐ The selection or election of delegates to Diocesan Convention
- ☐ Announce the date for two weeks prior to the Annual Meeting
- ☐ Announce slates for Vestry and Delegate(s)/Alternate(s) if applicable
- ☐ Prepare the following, at minimum:
  - ☐ Presentation of year end finances from the prior year
  - ☐ Election of new vestry members - ballots or other supporting materials
  - ☐ Election of Delegate(s)/Alternate(s) to convention or an explanation of how those will be chosen.
  - ☐ Celebrations/Appreciations for the past year's accomplishments

## New York Law

New York State is unique in that there are state laws that provide oversight to Episcopal congregations and their governance, including Annual Meetings. You can find detailed information on state law regarding annual meetings by [clicking here](#). A couple things to note:

- Each congregation is required to have two wardens and three vestry members, minimum.

- Notice must be provided for two weeks in advance of the Annual Meeting that the meeting is happening.

## A Note about Bylaws

All incorporated parishes in New York State have bylaws. It's a good idea to be familiar with your bylaws. Many EDNY congregations have bylaws that were created years ago, and do not align with best practices for governance. This is fixable! Bylaws can be revised and these revisions can be approved at annual meetings of the congregation. Church bylaws must comply with New York State Law as well as with the canons of the diocese and the churchwide canons.