



21 December 2023

Dear Congregation/Presbytery Treasurer and Secretary

Thank you for your patience and guidance in revising the annual return form template. We wanted to provide the revised form so that you could plan and familiarise yourself with the new format.

*This communication is to provide you with the revised:*

- 2024 Annual Return Form
- 2024 Annual Return Form Guidelines

The new annual return form template will apply for the 2024 reporting period (Financial Year: July'23 to June'24 or Calendar Year: January'23 to December'23).

The review process involved consultations with both users and preparers of the annual return report to ensure a holistic review process. While we have tried to accommodate all the requests, we had to balance trying to satisfy different requirements across the various annual return information user groups. Overall, we tried our best in finding the right compromise where possible.

Below is a summary of some of the changes in the annual return form template:

- remove obsolete reporting items such as future development fund (FDF) contributions or mutual support scheme (MSS)
- remove some of the reporting item categories and where applicable combined them into the more general categories
  - Where an item/category has been removed, we have retained the old description with a reference to a new category
- The energy data fields have been reformatted into a table to allow listing of several electricity accounts.

The item references have not been renumbered when the item/category has been removed to minimise extra time and work in any resets of accounting systems ledger setups and configurations/mapping to annual return.

The section relating to the membership and activity data (non-financial information) has incorporated the changes from the 2023 annual return form template where the level of detail was expanded. It would be helpful for your congregation to return the data relating to this section as it is expected that the congregation has implemented systems and processes to ensure the required data collection for the 2024 Annual Return.

Thank you again for providing the feedback which helped the revision process of the 2024 annual return template. Please note that this letter is sent for information purposes to assist congregations to transition to the new template. A letter will be sent towards the middle of 2024 to request the return of the 2024 annual return information.

Should you have any queries, please don't hesitate to contact the Synod office finance team at [pres.accounts@ucaqld.com.au](mailto:pres.accounts@ucaqld.com.au).

**Peter Cranna**

**Executive Director Strategic Resources and Assurance**