UUA BOARD OF TRUSTEES
MONITORING REPORT SCHEDULE
Sorted by *Policy Number*

Policy	Policy Title	Method of Monitoring	Frequency	Next Due to Board
1.0	Ends	Internal	Annual	20-Dec
2.0	Global Leadership Covenant	Internal	Annual	20-Apr
2.1	Treatment of People	Internal	Every 3 years beginning 2014	6/20/2014
2.2	Treatment of Congregations	Internal	Every 3 years, beginning in 2013	2/20/2016
2.3	Treatment of Staff	Internal	Every 3 years, beginning in 2012	8/20/2015
2.4	Compensation and Benefits	Internal	Every 3 years, beginning in 2014	10/20/2014
2.5	Employee Benefits for UU Organizations	Internal	Every 3 years, beginning in 2012	9/20/2015
2.6	Financial Planning and Budgeting	Internal	Every 2 years beginning in 2014	4/2/2014
2.6.4	Assessment of Current Property Holdings	Internal	Every 10 years, beginning in 2013	3/20/2023
2.7	Financial Condition & Activities		See sub-policies	
2.7.1	Annual Audit	Direct Inspection	Annual	20-Dec
2.7.2	Donor Restricted Funds	Internal	Every 3 years, beginning in 2013	12/20/2016
2.7.3	Transparent Reporting	Internal	Every 3 years, beginning in 2012	9/20/2015
2.7.4	Budget Oversight	Internal	Annual	20-Sep
2.7.5	Gift Acceptance	Internal	Annual	20-Sep
2.7.6	Real Property Transactions	Internal	Annual	20-Sep
2.7.7	Reporting of All Transactions	Internal	Annual	20-Dec
2.8.8	Travel Expense Oversight	Internal	Every 3 years, FY13	3/20/2016
2.8	Grants, Contracts & Partnerships	Internal	Every 2 years, beginning in 2013	5/20/2015
2.9	Asset Protection	Internal	Every 2 years, beginning in 2014	12/20/2014

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2.1	External Relations	Internal	Every 2 years, beginning in 2014	7/20/2016
2.11	Emergency President Incapacity	Internal	Every 3 years, beginning in 2013	2/20/2016
2.12	Election Practices	Internal	March of the year following election of Moderator or President (March 2014)	3/20/2014
2.13	Comm. & Support to Board	Direct Inspection	Annual	20-Mar
2.14	Implementation of the Business Resolutions of GA	Internal	Annual	20-Mar
3.0	Global Gov. Commitment	Direct Inspection	Annual	20-Sep
3.1	Governing Style	Direct Inspection	Annual	20-Sep
3.2	Board Job Description	Direct Inspection	Annual	20-Sep
3.3	Board & Bd Mbr Code of Conduct	Direct Inspection	Annual	20-Sep
3.4	External Relations	Direct Inspection	Annual	20-Dec
3.5	Agenda Planning	Direct Inspection	Annual	20-Dec
3.6	Elect of Officers & Officers Roles	Direct Inspection	Annual	20-Dec
3.7	Board Committee Principles	Direct Inspection	Annual	20-Dec
3.8	Board Committee Structure	Direct Inspection	Annual	20-Mar
3.9	Cost of Governance	Direct Inspection	Annual	20-Mar
3.10	Board / General Assembly Relations	Monitored by the CGO	Annual	20-Mar
4.0	Board-President Linkage	Direct Inspection	Annual	20-Mar
4.1	Unity of Control	Direct Inspection	Annual	20-Mar

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4.2	Accountability to the President	Direct Inspection	Annual	20-May
4.3	Partnership with the President	Direct Inspection	Annual	20-May
4.4	Monitoring Pres. Performance	Direct Inspection	Annual	20-May
4.5	Presidential Comp and Benefits	Direct Inspection	Annual	20-May