

**UUA Board of Trustees**  
**PERPETUAL CALENDAR**  
(updated 9/26/2016)  
***SORTED BY DATE DUE TO BOARD***

<b>Policy</b>	<b># of Policies &amp; Sub-policies</b>	<b>Policy Title</b>	<b>Date of Last Monitoring Report</b>	<b>Accepted/Not Accepted</b>	<b>Method of Monitoring</b>	<b>Frequency</b>	<b>Next Due to Board</b>	<b>Meeting at Which Item Is Reviewed By Board</b>
2.12	13	Communication & Support to Board	5/20/2013	Accepted	Direct Inspection	Annual	3/20/2015	April
2.7.5	1	Reporting of All Transactions	9/18/2014	Accepted	Internal	Annual	12/20/2015	January
2.10	1	Emergency President Incapacity	2/20/2013	Accepted	Internal	Every 3 years, beginning in 2016	2/20/2016	April
2.9	1	External Relations	10/12/2014	Accepted	Internal	Every 2 years, beginning in 2014	7/20/2016	October
1.0	10	Ends	12/24/2014	Accepted	Direct Inspection	Annual	9/20/2016	October
2.2	3	Treatment of Congregations	5/20/2013	Will be voted upon at Oct. 2016 meeting	Internal	Every 3 years, beginning in 2016	9/30/2016	October
2.4	9	Compensation and Benefits	10/1/2009	Will be voted upon at Oct. 2016 meeting	Internal	Every 3 years, beginning in 2015	9/30/2016	October
2.7	1	Financial Condition & Activities	9/30/2016	Will be voted upon at Oct. 2016 meeting	Internal	See sub-policies	9/30/2016	October
2.7.2	1	Budget Oversight	9/18/2015	Will be voted upon at Oct. 2016 meeting	Internal	Annual	9/30/2016	October
2.7.3	1	Gift Acceptance	9/18/2015	Will be voted upon at Oct. 2016 meeting	Internal	Annual	9/30/2016	October

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2.7.4	1	Real Property Transactions	9/18/2015	Will be voted upon at Oct. 2016 meeting	Internal	Annual	9/30/2016	October
2.7.1	1	Annual Audit	9/18/2015	Accepted	Direct Inspection	Annual	12/20/2016	January
2.8	2	Asset Protection	12/19/2014	Accepted	Internal	Every 2 years, beginning in 2014	12/20/2016	January
3	1	Global Gov. Commitment	12/20/2016	x	Direct Inspection	Annual	12/20/2016	October
3.1	1	Governing Style	12/20/2016	x	Direct Inspection	Annual	12/20/2016	October
3.2	1	Board Job Description	12/20/2016	x	Direct Inspection	Annual	12/20/2016	October
3.3	1	Board & Bd Mbr Code of Conduct	12/20/2016	x	Direct Inspection	Annual	12/20/2016	October
3.4	1	External Relations	12/20/2016	x	Direct Inspection	Annual	12/20/2016	January
3.5	1	Agenda Planning	12/20/2016	x	Direct Inspection	Annual	12/20/2016	January
3.6	1	Elect of Officers & Officers Roles	12/20/2016	x	Direct Inspection	Annual	12/20/2016	January
3.7	1	Board Committee Principles	12/20/2016	x	Direct Inspection	Annual	12/20/2016	January
1.0	10	Ends	12/24/2014	Accepted	Internal	Annual	3/20/2017	April
3.8	1	Cost of Governance	4/20/2016	x	Direct Inspection	Annual	3/20/2017	April

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3.9	1	Board / General Assembly Relations	4/20/2016	x	Monitored by the CGO	Annual	3/20/2017	April
4.0	1	Board-President Linkage	4/20/2016	x	Direct Inspection	Annual	3/20/2017	April
4.1	1	Unity of Control	4/20/2016	x	Direct Inspection	Annual	3/20/2017	April
2.6	5	Financial Planning and Budgeting	4/3/2015	Accepted	Internal	Every 2 years beginning in 2016	4/2/2017	April
4.2	1	Accountability to the President	6/20/2016	x	Direct Inspection	Annual	5/20/2017	June
4.3	1	Monitoring Pres. Performance	6/20/2016	x	Direct Inspection	Annual	5/20/2017	June
4.4	1	Presidential Comp and Benefits	6/20/2016	x	Direct Inspection	Annual	5/20/2017	June
2.1	5	Treatment of People	12/20/2014	Accepted	Internal	Every 3 years beginning 2017	12/20/2017	January
2.11	2	Election Practices	12/20/2014	Accepted	Internal	March of the year following election of Moderator or President (March 2018)	3/20/2018	April
2.8.1		UU Identity in Professional Ranks	6/18/2015	Accepted	Internal	Every 3 years, beginning in 2018	6/18/2018	June
2.3	1	Treatment of Staff	9/11/2015	Accepted	Internal	Every 3 years, beginning in 2015	8/20/2018	October

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<b>2.5</b>	<b>2</b>	Employee Benefits for UU Organizations	9/18/2015	Accepted	Internal	Every 3 years beginning in 2015	9/20/2018	October
<b>2.6.2</b>	<b>1</b>	Assessment of Current Property Holdings	4/13/2015	Accepted	Internal	Every 10 years, beginning in 2013	3/20/2023	October
<b>3.10</b>	<b>1</b>	Board Need for GA Time	4/20/2016	x	???	Annual	???	
<b>2.13</b>	<b>4</b>	Implementation of the Business Resolutions of GA	(Checking status)	(Checking status)	Internal	Annual	(Checking status)	April
<b>2.0</b>	<b>1</b>	Global Leadership Covenant	See subpolicies	See subpolicies	Internal	Annual	See subpolicies	June (Global policy is addressed in subpolicies which have different due dates)