

Policy of Regular Reports to the Board of Trustees

Unitarian Universalist Congregation at Montclair

Approved by the Board: January, 2019

Purpose: To establish a regular reporting structure, responsibility, and accountability so that the Board of Trustees, Staff, and Leaders will have the information necessary to ascertain whether or not the congregation is fulfilling it's mission, and working toward it's vision, and strategic goals.

Responsibility

- **The Secretary of the Board of Trustees will:**
 - See that the all reporting bodies (other than finance) receive appropriate communication.
 - See that the reporting bodies (other than finance) fulfill their reporting obligation.
 - Communicate technological and administrative needs to the Administrator, so that the Administrator can support the work outlined in this policy.
 - Ensure that the quarterly reports are accessible to the staff, and that the annual reports are accessible to the whole congregation and are archived for preservation.
- **The Treasurer of the Board of Trustees will:**
 - See that all finance reporting bodies receive appropriate communication.
 - See that the finance reporting bodies fulfill their reporting obligation.
- **The Administrator of the Unitarian Universalist Congregation at Montclair will:**
 - Support the work outlined in this policy in a way that is commensurate with the administrators job description.
- **The Office and Communications Director will:**
 - Support the work outlined in this policy in a way that is commensurate with the Office and Communications directors job description.
- **Committee, Council and Team Leaders will:**
 - Provide reports in a timely and clear manner.

Reporting Structure:

Noted bodies will provide the Board with a written report including, but not limited to, the required information. The Executive Team can determine on a case by case basis whether or not they wish to receive a report in person at the Board Meeting.

- **September:** Worship and Celebration; Family Ministry
- **October:** Welcome and Engagement; Care and Connection (+Auction Team)
- **November:** Service and Justice, Stewardship
- **December:** Worship and Celebration; Family Ministry (+Special Finance Report to Board on Priorities for the Budget)
- **January:** Welcome and Engagement, Care and Connection (+Special Pledge Team Report)
- **February:** Service and Justice; Stewardship (+Nominating and Leadership Development Report on the Slate)
- **March:** Worship and Celebration; Family Ministry
- **April:** Welcome and Engagement; Care and Connection
- **May:** Service and Justice; Stewardship

- **June:** (Special report from the Council on Ministries concerning the health and success of the various ministry areas of the congregation)
- **July:** Annual Reports for all Ministry Areas
- **August:**

Reports, by Ministry Areas:

Worship and Celebration

Quarterly Reports		Annual Reports	
Responsible Party	Report	Responsible Party	Report
		Office and Communications Manager	# of Child Dedications for members, and list of children
		Office and Communications Manager	# of Marriages for members, and list of names
		Office and Communications Manager	# of Memorial Services, for members, and list of names
Office and Communications Manager	# of Remembrances		
Music Director	# of regular participants in choirs + number of volunteer instrumentalists	Music Director	# of regular participants in choirs + number of volunteer instrumentalists
		Music Director	# of special musical guests and names
		Memorial Garden Coordinator	# and names of burials and scatterings in the Memorial Garden

Quarterly Reports			Annual Reports	
Responsible Party	Report		Responsible Party	Report
			Worship Team	Team Members, roles, list of accomplishments, and suggestions for improvement
				# of guest led services and list of guests
			Music Committee	Team Members, roles, list of accomplishments, and suggestions for improvement
				Special events/ performances
			Composer in Residence	Names of new pieces, accomplishments and suggestions for improvement
			Drama Group	Team Members, roles, list of accomplishments, and suggestions for improvement

Family Ministry

Quarterly Reports			Annual Reports	
Responsible Party	Report		Responsible Party	Report
Director of Family Ministry	Attendance in RE Program per class/ activity		Director of Family Ministry	Attendance in RE Program per class/ activity
Director of Family Ministry	# of RE Registrations		Director of Family Ministry	# of RE Registrations

Quarterly Reports			Annual Reports	
Responsible Party	Report		Responsible Party	Report
			Director of Family Ministry	% of families that paid for their RE participation
			Director of Family Ministry	# of volunteers
			Director of Family Ministry	# of new volunteers
			RE Council	Team Members, roles, list of accomplishments, and suggestions for improvement
Administrator	# of attendees for Adult Education classes per class		Administrator	# of attendees for Adult Education classes per class
			Youth Group Coordinators	Leaders, roles, list of accomplishments, and suggestions for improvement

Welcome and Engagement

Quarterly Reports			Annual Reports	
Responsible Party	Report		Responsible Party	Report
Membership Team	# Members		Membership Team	# Members
Membership Team	# of Connection Card Submissions		Membership Team	# of Connection Card Submissions
Membership Team	# of Attendees to Newcomer Connections		Membership Team	# of Attendees to Newcomer Connections
Membership Team	# of Attendees to Pathways		Membership Team	# of Attendees to Pathways

Quarterly Reports		Annual Reports	
Responsible Party	Report	Responsible Party	Report
Membership Team	# of New Members	Membership Team	# of New Members
Membership Team	# of Attendees at Worship	Membership Team	# of Attendees at Worship
		Membership Team	Team Members, roles, list of accomplishments, and suggestions for improvement
Connection Cafe Coordinator	# of Connection Cafe Volunteer Hosts	Connection Cafe Coordinator	# of Connection Cafe Volunteer Hosts and # of Sundays without Volunteer Hosts
Office and Communications Manager	# of new likes on Facebook	Office and Communications Manager	# of new likes on Facebook
Office and Communications Manager	# of new email addresses on congregational list	Office and Communications Manager	# of new email addresses on congregational list
Office and Communications Manager	Open rate for E-Blasts and Gazettes	Office and Communications Manager	Open rate for E-Blasts and Gazettes
Office and Communications Manager	# of visits to the website and # of visits to most popular pages	Office and Communications Manager	# of visits to the website and # of visits to most popular pages
		Communications Team	Team Members, roles, list of accomplishments, and suggestions for improvement
		Harvest the Power Coordinator	Team Members, roles, list of accomplishments, and suggestions for improvement

Quarterly Reports		Annual Reports	
Responsible Party	Report	Responsible Party	Report
		Harvest the Power Coordinator	# of people who graduated from HTP, names and chosen leadership areas

Care and Connection

Quarterly Reports		Annual Reports	
Responsible Party	Report	Responsible Party	Report
Covenant Group Program Coordinator	# of active Covenant Groups	Covenant Group Program Coordinator	# of active Covenant Groups with names and names of facilitators
		Covenant Group Program Coordinator	# of participants in Covenant Groups
		Covenant Group Program Coordinator	# of new participants in Covenant Groups
		Administrator	# and names of active small groups and # of participants in each
Care Team Lead	# of people receiving any support from the Care Team		
		Care Team	Team Members, roles, list of accomplishments, and suggestions for improvement
		Care Team	# of people given regular rides + # receiving regular rides
		Care Team	# of people given calls + # receiving regular visits
		Care Team	# of people given meals

Quarterly Reports		Annual Reports	
Responsible Party	Report	Responsible Party	Report
		Care Team	# of people visited + # receiving regular visits
		Care Team	# of people sent cards

Service and Justice

Quarterly Reports		Annual Reports	
Responsible Party	Report	Responsible Party	Report
Social Justice Coalition	# of participants in Justice Sundays	Social Justice Coalition	# of participants in Justice Sundays
Social Justice Coalition	# of Participants in each justice action/ event	Social Justice Coalition	# of participants in each justice action/ event
		Social Justice Coalition	# of groups beyond the congregation + their names, that we partnered with
		Social Justice Coalition	Coalition members roles, list of accomplishments, and suggestions for improvement
Sharing our Riches	Amounts received for Sharing our Riches collections	Sharing our Riches	Amounts received for Sharing our Riches collections + list of recipients
		Sharing our Riches	Team Members, roles, list of accomplishments, and suggestions for improvement

Quarterly Reports			Annual Reports	
Responsible Party	Report		Responsible Party	Report
			Earth Justice	Team Members, roles, list of accomplishments, and suggestions for improvement
			Undoing Racism Committee	Team Members, roles, list of accomplishments, and suggestions for improvement
			UU Faith Action NJ	Team Members, roles, list of accomplishments, and suggestions for improvement
			Rainbow UU	Team Members, roles, list of accomplishments, and suggestions for improvement
			MESH Cafe	Team Members, roles, list of accomplishments, and suggestions for improvement
			Tutoring	Team Members, roles, list of accomplishments, and suggestions for improvement

Quarterly Reports			Annual Reports	
Responsible Party	Report		Responsible Party	Report
			IHN	Team Members, roles, list of accomplishments, and suggestions for improvement
			Mantle of Giving	Team Members, roles, list of accomplishments, and suggestions for improvement

Stewardship

Quarterly Report			Annual Report	
Responsible Party	Report		Responsible Party	Report
Building and Grounds	Completed projects and expenses, including any emergency repairs		Building and Grounds	Completed projects and expenses
Building and Grounds	Upcoming projects + expected expenses		Building and Grounds	# of participants in Justice Sundays
			Building and Grounds	Team members
Pledge Team	# of Pledge Units, # of New Pledge Units		Pledge Team	# of Pledge Units
Pledge Team	General Report on the Pledge Campaign (Special Report in January Only)		Pledge Team	Pledge Data: Average, mean, breakdown per area (under \$500, between \$500 and \$1000, etc.)
			Pledge Team	# of lost Pledge Units
			Pledge Team	# of Sustaining Members
			Pledge Team	# of Angell Society Pledgers

Quarterly Report		Annual Report	
Responsible Party	Report	Responsible Party	Report
		Pledge Team	Team Members, roles, list of accomplishments, and suggestions for improvement
		Personnel Team	Team Members, roles, list of accomplishments, and suggestions for improvement
		Personnel Team	% of Staff receiving Fair Compensation
Finance Team	Actuals vs. Budget (Noting budget line items running higher and lower than projections)	Finance Team	Actuals vs. Budget
Finance Team	Investment Income	Finance Team	Team Members, roles, list of accomplishments, and suggestions for improvement
Finance Team	Priorities for the Board to Consider for the upcoming Pledge Drive (Special Report in December Only)		
Endowment Team	# of contributions to the Endowments	Endowment Team	# of contributions to the Endowments
		Endowment Team	Amount of each Endowment + % of growth or loss
		Endowment Team	Team Members, roles, list of accomplishments, and suggestions for improvement

Quarterly Report			Annual Report	
Responsible Party	Report		Responsible Party	Report
Auction Team	Auction Plan including expected expenses and income (Special Report in September Only)		Auction Team	Team Members, roles, list of accomplishments and suggestions for improvement
			Auction Team	Income, Expenses
			Auction Team	# of people that participated in the Auction
			Archives	Team Members, roles, list of accomplishments, and suggestions for improvement
Nominating and Leadership Development	Slate of Candidates (Special Report in February Only)		Nominating and Leadership Development	Team Members, roles, list of accomplishments, and suggestions for improvement

Sample Report Request Form

The Board of Trustees at the Unitarian Universalist Congregation at Montclair is grateful for your service to our congregation. We hope you will provide us a report for an upcoming Board Meeting. Your report will help us lead the congregation in fulfilling our strategic objectives, and will guide us in setting budget and visionary goals.

Written reports should be submitted two weeks prior to the Board Meeting so that they can be considered by the Executive Team, in preparation for the meeting. Please submit your written report by _____ to _____.

Report:

(The specific requested quantifiable measurements are listed here.)

What more, if anything would you like to report? Please share any challenges, hopes, and goals that you feel we should know.

(This can be added once we have a Strategic Plan) What support do you need to fulfill the objectives set forth in our strategic plan? Consider spiritual, financial, technological, leadership training, administrative and volunteer support.