**Unitarian Universalists for Social Justice**

**Recurring Administrative Calendar Events**

**July:**

* Treasurer distributes approved budget to Board, Staff, and Committee Chairs.
* Treasurer distributes final previous year budget to Board, Staff, and Committee Chairs.
* Board responds to any issues raised at the Annual Meeting.
* Board determines monthly meeting schedule, place on calendar.
* Administrator publishes membership roll.
* Accountant distributes monthly reports on revenue and spending.
* Board updates active Committee List identifies Chair responsibility.

**August:**

* Accountant distributes monthly reports on revenue and spending.

**September:**

* Accountant distributes monthly reports on revenue and spending.
* Board publishes Annual Report

**October**:

* Accountant distributes monthly reports on revenue and spending.
* Finance Committee prepares guidance for FY 2016 – 2017 Budget for Board’s consideration.
* Board calls for Committee & staff priorities to FY 2016 – 2017 Budget.
* Treasurer prepares quarterly financial report with projections for remainder of year.
* Gala

**November:**

* Board communicates budget guidance to staff, committee chairs.
* Finance Committee meets with Board, committee chairs and staff to ensure budget process is understood.
* Committee chairs & staff begin preparation of budget requirements.
* Accountant distributes monthly reports on revenue and spending.

**December**:

* All stakeholders prepare budget requests for FY 2016 – 2017.
* Accountant distributes monthly reports on revenue and spending.
* Board reviews special project proposals for FY 2016-2017.

**January:**

* Accountant distributes monthly reports on revenue and spending.
* Accountant distributes IRS Form 1099s to contractors.
* Accountant distributes IRS Form W2’s to employees.
* Finance Committee reviews committee- and staff-submitted budget requests.
* Treasurer submits quarterly financial report with projections for remainder of year.
* Core group distributes final report for National Issue Advocacy Project grant.
* Board approves Combined Federal Campaign (CFC) application.
* Administrator & Board Co-Chairs begins development of Annual Report.

**February**:

* Accountant distributes monthly reports on revenue and spending.
* Treasurer delivers IRS Form 1099s, Form 1096s & Form W2s to IRS.
* Finance Committee prepares recommended budget.
* Finance Committee submits recommended budget to the Board.
* UU Congregations certify numbers of members for assessment of following fiscal year Fair Share Targets.

**March:**

* Accountant distributes monthly reports on revenue and spending.
* Board issues call for Annual Reports from Committees, Task Forces.
* Nomination Committee established, begins nomination process.
* Finance committee submits proposed 2016 – 2017 budget.
* Board adopts a proposed budget for 2016 - 2017.

**April**:

* Accountant distributes monthly reports on revenue and spending.
* **Joseph Priestly District Assembly.**
* Treasurer prepares quarterly financial report with projections for remainder of year.
* Treasurer renews D&O Insurance policy
* Treasurer renews DC Report for Domestic & Foriegn Filing Entity (Two-Year Report, next due date 2016)
* Nomination Committee provides its recommendations to Board

**May**:

* **Annual Meeting**
* Accountant distributes monthly reports on revenue and spending.
* Finance Committee reviews congregational pledges made and recommends appropriate adjustments to budget.
* Finance Committee reviews proposed budget and proposes Fair Share assessment for each member congregation.
* Board establishes Fair Share assessment.
* Finance Committee forwards revised budget to Board.
* Board approves recommended budget revisions.
* Board establishes priorities for coming fiscal year.
* Board distributes contact list of new Board.
* New Board/contact information distributed.

**June**:

* **UUA General Assembly.**
* Accountant distributes monthly reports on revenue and spending.

**To Be Scheduled**

* Board Meeting dates.
* Core Group meetings. (formal & Conference call)
* Gala
* Publication of Annual Report (in 2012-13 it was scheduled for October. Why not shortly after the end of the Fiscal Year)