

BOARD CALENDAR AND MONITORING SCHEDULE for FY '26 – '27

Approved July 15, 2026

July 2026

Meetings

Date	What
Wed, Jul 15	July Meeting 

Reports due

Deadline	What	Who
Fri, Jul 10	July Treasurer’s Report	Bill Lonnberg

Other board tasks

Deadline	What	Who
Fri, Jul 10	Draft monitoring schedule	Corrin Clarkson
Wed, Jul 15	Finalize monitoring schedule	Board

August 2026

Meetings

Date	What
Wed, Aug 19	Aug. Meeting 

Reports due

Deadline	What	Who
Fri, Aug 14	Aug. Treasurer’s Report	Bill Lonnberg
Fri, Aug 14	Report on Insurance, Limits and Coverages	Amanda Waye
Sat, Aug 15	Aug. Lead Minister’s Report	Susan Frederick-Gray

No other board tasks

September 2026

Meetings

Date **What**

Sat, Sep 12 Board retreat 

Wed, Sep 16 Sep. Meeting 

Reports due

Deadline	What	Who
Fri, Sep 11	Fall Life Span Religious Exploration Update	Stephanie Kimball
Fri, Sep 11	Sep. Treasurer's Report	Bill Lonnberg
Sat, Sep 12	Sep. Lead Minister's Report	Susan Frederick-Gray

Other board tasks

Deadline	What	Who
Sat, Sep 12	Draft Annual Planning document	Board
Sat, Sep 12	Review Covenant	Board
Wed, Sep 16	Finalize annual planning document	Board
Fri, Sep 18	Post annual planning document to website	Sarah Kopper

October 2026

Meetings

Date **What**

Wed, Oct 21 Oct. Meeting 

Reports due

Deadline	What	Who
Fri, Oct 09	Connections Coordinator Report	Anabel Watson
Fri, Oct 16	1st Quarter Statement of Cash Flow	Bill Lonnberg
Fri, Oct 16	Oct. Treasurer's Report	Bill Lonnberg
Sat, Oct 17	Oct. Lead Minister's Report Including annual goals	Susan Frederick-Gray
Wed, Oct 21	Bylaws revisions update	Regina DiLavore

No other board tasks

November 2026

Meetings

Date **What**

Wed, Nov 18 Nov. Meeting 

Reports due

Deadline	What	Who
Fri, Nov 13	Finalize proposed bylaws changes	Sarah Kopper
Fri, Nov 13	Nov. Treasurer's Report	Bill Lonnberg
Sat, Nov 14	Nov. Lead Minister's Report	Susan Frederick-Gray
Wed, Nov 18	Social Justice Report	Social Justice Coordinating Team

Other board tasks

Deadline	What	Who
Fri, Nov 13	Notification to Congregation of Mid-Year Meeting	Sarah Kopper
Mon, Nov 23	Summary of budget changes for Congregation (if necessary)	Bill Lonnberg

December 2026

Meetings

Date **What**

Sun, Dec 13 Mid-Year Congregational Meeting 

Wed, Dec 16 Dec. Meeting 

Reports due

Deadline	What	Who
Fri, Dec 11	Dec. Treasurer's Report	Bill Lonnberg
Fri, Dec 11	Personnel Policies and Safety Update	Susan Frederick-Gray
Sat, Dec 12	Dec. Lead Minister's Report	Susan Frederick-Gray
Wed, Dec 16	SPF Update on performance including operating fund	Special Purposes Fund (SPF)

No other board tasks

January 2027

Meetings

Date **What**

Wed, Jan 20 Jan. Meeting 

Reports due

Deadline	What	Who
Fri, Jan 15	2nd Quarter Statement of Cash Flow	Bill Lonnberg
Fri, Jan 15	Jan. Treasurer's Report	Bill Lonnberg
Sat, Jan 16	Jan. Lead Minister's Report	Susan Frederick-Gray
Wed, Jan 20	Pledge Drive Committee Report	Pledge Drive Committee

Other board tasks

Deadline	What	Who
Wed, Jan 20	Midyear assessment of progress toward annual goals	Board

February 2027

Meetings

Date **What**

Wed, Feb 17 Feb. Meeting 

Reports due

Deadline	What	Who
Fri, Feb 12	Draft FY27 budget for review	Bill Lonnberg
Fri, Feb 12	Feb. Treasurer's Report	Bill Lonnberg
Fri, Feb 12	Music Director Report	Susan Swaney
Sat, Feb 13	Feb. Lead Minister's Report	Susan Frederick-Gray

Other board tasks

Deadline	What	Who
Wed, Feb 17	Choose GA delegates	Board
Wed, Feb 17	Review the Lead Minister's salary, housing, and benefits	Board

March 2027

Meetings

Date **What**

Wed, Mar 17 Mar. Meeting 

Reports due

Deadline	What	Who
Fri, Mar 12	Mar. Treasurer's Report	Bill Lonnberg
Fri, Mar 12	Spring Life Span Religious Exploration Update	Stephanie Kimball
Sat, Mar 13	Mar. Lead Minister's Report	Susan Frederick-Gray
Wed, Mar 17	Right Relations Committee Report	Right Relations Committee

Other board tasks

Deadline	What	Who
Wed, Mar 17	Finalize annual assessment instruments	Board

April 2027

Meetings

Date **What**

Wed, Apr 21 Apr. Meeting 

Reports due

Deadline	What	Who
Fri, Apr 16	3rd Quarter Statement of Cash Flow	Bill Lonnberg
Fri, Apr 16	Apr. Treasurer's Report	Bill Lonnberg
Sat, Apr 17	Apr. Lead Minister's Report	Susan Frederick-Gray
Wed, Apr 21	Leadership Cultivation Committee Report	Leadership Cultivation Committee (LCC)

Other board tasks

Deadline	What	Who
Wed, Apr 07	Complete Board self-assessment	Board
Wed, Apr 21	Complete annual assessment of Lead Minister (discuss in Exec Session)	Board
Wed, Apr 21	Review Board self-assessment	Board

May 2027

Meetings

Date **What**

Wed, May 1: May Meeting 

Reports due

Deadline	What	Who
Fri, May 14	Final Proposed Budget for Approval	Bill Lonnberg
Fri, May 14	May Treasurer's Report	Bill Lonnberg
Sat, May 15	May Lead Minister's Report	Susan Frederick-Gray
Sun, May 16	Board annual reports	Board & Rev. Susan
Sun, May 16	Committee annual reports	
Sun, May 16	Staff annual reports	

Other board tasks

Deadline	What	Who
Fri, May 07	Notification to Congregation of Annual Congregational Meeting	Sarah Kopper
Wed, May 1	Select service award recipients	Board
Wed, May 2	Summary of proposed budget for Congregation	Bill Lonnberg

June 2027

Meetings

Date **What**

Sun, Jun 06 Annual Congregational Meeting 

Wed, Jun 16 Jun. Meeting 

Reports due

Deadline	What	Who
Fri, Jun 11	Jun. Treasurer's Report	Bill Lonnberg
Fri, Jun 11	Review capital planning document	Bill Lonnberg
Sat, Jun 12	Jun. Lead Minister's Report	Susan Frederick-Gray

Other board tasks

Deadline	What	Who
Wed, Jun 16	Approve housing allowance for Rev. Susan	Susan Frederick-Gray

Appendix A: Board meetings

Board meetings are typically held in the UUCB library. Zoom links are available on request. Email office@uubloomington.org.

July - December 2026

Date	What
Wed, Jul 15	July Meeting 
Wed, Aug 19	Aug. Meeting 
Sat, Sep 12	Board retreat 
Wed, Sep 16	Sep. Meeting 
Wed, Oct 21	Oct. Meeting 
Wed, Nov 18	Nov. Meeting 
Sun, Dec 13	Mid-Year Congregational Meeting 
Wed, Dec 16	Dec. Meeting 

January - June 2027

Date	What
Wed, Jan 20	Jan. Meeting 
Wed, Feb 17	Feb. Meeting 
Wed, Mar 17	Mar. Meeting 
Wed, Apr 21	Apr. Meeting 
Wed, May 19	May Meeting 
Sun, Jun 06	Annual Congregational Meeting 
Wed, Jun 16	Jun. Meeting 

Appendix B: Reports from non-board members

Committee reports

Deadline	What	Who
Wed, Nov 18	Social Justice Report	Social Justice Coordinating Team
Wed, Dec 16	SPF Update on performance including operating fund	Special Purposes Fund (SPF)
Wed, Jan 20	Pledge Drive Committee Report	Pledge Drive Committee
Wed, Mar 17	Right Relations Committee Report	Right Relations Committee
Wed, Apr 21	Leadership Cultivation Committee Report	Leadership Cultivation Committee (LCC)
Sun, May 16	Committee annual reports	

Staff reports

Deadline	What	Who
Fri, Aug 14	Report on Insurance, Limits and Coverages	Amanda Waye
Fri, Sep 11	Fall Life Span Religious Exploration Update	Stephanie Kimball
Fri, Oct 09	Connections Coordinator Report	Anabel Watson
Fri, Feb 12	Music Director Report	Susan Swaney
Fri, Mar 12	Spring Life Span Religious Exploration Update	Stephanie Kimball
Sun, May 16	Staff annual reports	

Appendix C: Other board tasks

July - December 2026

Deadline	What	Who
Fri, Jul 10	Draft monitoring schedule	Corrin Clarkson
Wed, Jul 15	Finalize monitoring schedule	Board
Sat, Sep 12	Draft Annual Planning document	Board
Sat, Sep 12	Review Covenant	Board
Wed, Sep 16	Finalize annual planning document	Board
Fri, Sep 18	Post annual planning document to website	Sarah Kopper
Fri, Nov 13	Notification to Congregation of Mid-Year Meeting	Sarah Kopper
Mon, Nov 23	Summary of budget changes for Congregation (if necessary)	Bill Lonnberg

January - June 2027

Deadline	What	Who
Wed, Jan 20	Midyear assessment of progress toward annual goals	Board
Wed, Feb 17	Choose GA delegates	Board
Wed, Feb 17	Review the Lead Minister's salary, housing, and benefits	Board
Wed, Mar 17	Finalize annual assessment instruments	Board
Wed, Apr 07	Complete Board self-assessment	Board
Wed, Apr 21	Complete annual assessment of Lead Minister (discuss in Exec Session)	Board
Wed, Apr 21	Review Board self-assessment	Board
Fri, May 07	Notification to Congregation of Annual Congregational Meeting	Sarah Kopper
Wed, May 13	Select service award recipients	Board
Wed, May 21	Summary of proposed budget for Congregation	Bill Lonnberg
Wed, Jun 16	Approve housing allowance for Rev. Susan Frederick-Gray	Susan Frederick-Gray