

Guidelines and Template for Reporting to Permanent Board

Guidelines:

An informational report (when no action is requested and you or your group are not on the agenda) should be concise and no longer than 500 words.

Provide your report by the deadline stated by the Permanent Board clerk to ensure your report is included in the advance documents for the meeting. Generally, the deadline for Advance Documents is noon on the Friday the week before the meeting (8 days in advance of the meeting).

Don't assume that the reader knows the meaning of acronyms or the background for your report, or has other insider knowledge.

If the report is for a working group or resource group, list the names of all the members of the group. Include an email address to receive questions ahead of the meeting; this person may be contacted by members and attenders of the PB in advance of the meeting.

Be clear about the purpose of your report: are you bringing PB up to date? Informing them of an issue or upcoming event? Reporting on a meeting or event?

If you are presenting an item on the Permanent Board agenda:

- State clearly and concisely what you are asking PB to do and why (if there is action or a recommendation).
- If you wish to make a visual presentation, arrange that with the clerk in advance of the meeting, preferably before the Advance Documents deadline, so that the clerk may prepare the agenda properly.
- Anticipate questions that PB members may have and either provide answers in your advance report or be prepared to answer them at the meeting
- Find out from the clerk how much time you will have on the agenda and plan to stay within that time limit—the more information you can provide in advance of the meeting, the less time you will need to spend bringing PB members up to speed.
- It is not necessary to read the report to the Board; assume they have done their work and read it, but be prepared with a summary and to answer questions through the clerk.

Again, if the report does not require action but is informational in nature, the report will be included in the Advance Documents but will not appear on the agenda.

Proofread and check spelling

Template:

(Header) Please include basic information in the header both for the current reader and anyone who is looking back at this document months or years later.

(Purpose) The [committee/group] is submitting this report to [purpose]

(Background)

(Policy) If there is a PB or YM policy which affects this report/request, please name the policy, where it can be found, and a summary of the policy.

(Action) If you are requesting a decision or policy statement from PB, please state it clearly. **Consider putting the heart of the request in Boldface.** If this is just an interim report, that would be stated in (purpose), but at the conclusion of the report you may wish to indicate your expectations of future reports/requests for action.

(Attachments) If you are attaching any supporting materials, please name them.

(Signature) Please identify the writer of the report if it is one person, and the whole group who were involved in discernment. If it is a large, ongoing group, the report can be submitted by an individual “on behalf of xxxxx.”