



BLUE BOOK REPORTS

The following is a comprehensive document of general information and instructions for Blue Book Reports. Specific instructions also can be found within each section of the [online Blue Book application](#).

Requirement to produce the reports

It is the responsibility of each Interim Body to report to the General Convention at the end of their triennium of service. It is the responsibility of the Executive Officer of the General Convention to distribute the finalized reports to the members of the General Convention. Canon I.1.2(j) – (m), which is appended to this document, references the general requirements for commissions. The Executive Officer uses this Canon as a guideline for the requirements for all groups. But additional, more specific, requirements are necessary in order to accomplish the task of disseminating the information.

Purpose of the reports

The reports to the General Convention of The Episcopal Church, otherwise known as the “Blue Book Reports,” inform the General Convention of work done, conclusions, and recommendations, if any. The reports are also archival records of the ongoing work of the Church which document the membership of an Interim Body and what they accomplished during a specific triennium. A common mistake is to assume that the report is a temporary thing which only matters for the next session of the General Convention. Reports are, in fact, kept available online and in print versions at the Archives of The Episcopal Church. They become a part of our collective historical record and are referenced in subsequent years.

Another common misconception is that the purpose of the Interim Bodies is to produce resolutions. In fact, the purpose of each Interim Body is to address their mandate. Resolutions request an action of the Church, whereas the results of a group’s work might not require any action, but instead simply serve to better inform the Church. A resolution is not required to inform the Church of something, the report does that.

Submission Date

For the General Convention Office to have enough time to process, translate, and publish the reports on various media, the interim bodies must submit their reports in the Fall prior to General Convention. Reports are due **December 1st** the year before the General Convention meets. Please note that while the December due date appears to offer 6 months for processing, it is not the reality. Deadlines for translation, publishing, and other requirements mean that the total time available to process the individual reports only adds up to about 3 months. This, in turn, averages to about one report per workday. Most reports, however, are too long or complicated to process in one day. Some can take weeks. In addition the task is too unique to be done by temporary workers. In short, the task requires multiple regular staff working full time. Because of these factors it is not possible to set a later submission deadline. Groups that miss the submission deadline may not have their report published at all.

Due Date: **December 1st, 2020**

Online Blue Book Application

For 2020 the General Convention Office (GCO) has created an online blue book report application to aid the interim bodies and GCO staff in producing correct reports.

Advantages

1. There is no need to deal with margins, font, or formatting standards, the application sets these.
2. The required and optional sections and general report structure is clear.
3. Explanations and instructions are available for each section.
4. Contact information for the GCO blue book staff is viewable on every page.
5. The GCO staff have direct access to see and edit each group's report before or after submission. This means issues and questions can be addressed more easily in advance.
6. A preview and a draft download option allow each group to see how their final report will look and adjust their report as needed to work within the standards.

Roles, Responsibilities and Permissions

Blue Book Coordinator

Each group should appoint at least one Blue Book Coordinator. The group should communicate to the GCO staff at bluebook@episcopalchurch.org who the Blue Book Coordinator(s) will be. This person or persons will then be the primary contact for the GCO staff if issues arise with the report. This role's responsibility is to make sure all sections of the report are completed in the application and that the final report is submitted. If an optional section is not to be included someone must still mark that the group does not intend to include it. The membership and mandate sections must be approved or the GCO contacted if they need to be edited. If multiple people are writing sections of the Summary of Work someone must gather these up, copy them in and apply formatting in the application. Someone should proofread the report. And finally, someone must ensure the final report is submitted. Blue Book coordinators should be familiar with this document: "Blue Book Report Instructions".

Resolution Writing Coordinator

Each group that intends to propose resolutions should also appoint one or more resolution writing coordinators. Their job is to make sure all resolutions are researched, formatted, and written correctly. Resolutions should be researched to insure they are not repeating what has already been done in previous General Conventions and do not contradict the Constitution or Canons (unless they also propose to change them). They also must adhere to strict formatting rules. And finally, there are many common content issues that should be avoided. The Resolution Writing Coordinator should become familiar with the Resolution Writing Guidelines document published by the General Convention Office.

The resolution writing coordinator also must communicate with Standing Commissions and/or other interim bodies when appropriate, such as the Standing Commission on Governance, Structure and Constitution & Canons (SCSGC&C) when proposing a C&C amendment resolution or the Standing Commission on Liturgy and Music when proposing changes to liturgy or music. Also, if a resolution overlaps another Interim Body's mandate or topic of study the resolution writing coordinators of the two groups should discuss the overlap to insure they do not write duplicate resolutions.

The group should communicate to the GCO blue book staff at bluebook@episcopalchurch.org who the resolution writing coordinator(s) will be.

Permissions to view or edit the report

By default, all regular members of a group will have access to edit the group's blue book report in the blue book application. Non-members such as staff liaisons have read-only access. To be allowed read-only access a person must be part of the group in the GCO Extranet database, even if not a regular member. Read-only access allows one to login, view the report in a preview mode or download a draft pdf copy.

The chair of the Interim Body may contact the GCO blue book staff to request a change to the access permissions. For example, they may wish to grant only the blue book coordinator and the resolution writing coordinator the ability to edit in the application, so that there is less likelihood of accidental erasure.

Content

Blue Book reports contain three (3) required sections and four (4) optional sections. Because we need to reduce the size of the reports as much as possible, the GCO discourages filling out the optional sections unless there is a clear need.

Required Sections:

Membership – contains a listing of all current members of the group which is pulled from the GCO database, a listing of changes to memberships which is provided by the group (which shows who left and when and who replaced them), a listing of which deputy and bishop will represent the group at General Convention when their resolutions are considered, and optionally acknowledgements of some non-members. The membership list must be checked and explicitly approved by the report writer.

Mandate – contains the mandate of the group which is pulled from the GCO database. The mandate must be checked and explicitly approved by the report writer.

Summary of Work – contains an explanation of the work done by the group over the triennium and any recommendations of the group. The report cannot be submitted if this section is left blank.

Optional Sections:

Proposed Resolutions – contains resolutions the group proposes, if any. Resolutions are not required.

Budget Itemization – contains an itemization of expenses and income of the group over the triennium. This is mentioned in Canon I.1.2(k)(3), pertaining to standing commissions, but is not required for task forces and other groups. If a group intends to leave the budget section blank they must choose “no” in this section of the application.

Continuance Recommendation – If the group recommends that the Interim Body be reconstituted for the next triennium the group may explain their reasoning here. If a group intends to leave the continuance section blank they must choose “no” in this section of the application. This section does not apply to Standing Commissions and Boards and other groups which are automatically continued every triennium.

Supplementary materials – The GCO does not encourage including supplements as we wish to reduce the overall size of reports. In some cases, such as when the mandate of the group is to update a liturgy or a policy document, it is necessary to include a supplemental item. If a group wants to include supplemental items they should contact the GCO to justify their inclusion. If approved, the group should arrange to have the supplement translated and then send both the English and Spanish

versions to the bluebook staff at bluebook@episcopalchurch.org. The staff will upload the supplements to their report where they will be immediately viewable and downloadable for group members.

Subcommittee reports:

Some Interim Bodies, especially the Standing Commissions, may have multiple mandates to address. In these cases subcommittees are often created. For example, the mandate of the Standing Commission would be the Canons establishing it; while the mandates of the subcommittees might be the specific resolutions referred to that Standing Commission. These subcommittees may, but are not required to, write their own report which contains the same sections and is created in the same way as any other report. The difference is that subcommittee reports will then be appended to the main group's report and their resolutions inserted into the main group's proposed resolutions section. The chair of the parent group must contact the GCO to have a subcommittee enabled for Blue Book reports.

The GCO does not encourage having subcommittee's write their own reports because it increases the size and complexity of the main group's report. In some situations it can make sense, however, such as when each subcommittee is addressing a separate mandate handed down by the General Convention, or in the case of the Executive Council's standing subcommittees.

Formatting options in the Summary of Work section

The Summary of Work section allows basic text formatting, sub headers, indentations, tables, links, images, ordered and unordered lists, endnotes, and quotations from the C&C. Note the following special points:

Subsection Headers

Please apply the H1, H2, or H3 header formats to your subsection headers, paying attention to the hierarchies. These not only format the headers but also set them up as bookmarks in the final pdf. Marking headers is also important for accessibility. If you do not use the header markup the GCO staff will be forced to do this work and custom formatting you choose will be removed anyway.

Images

We ask that no unnecessary images be included. Images increase the complexity and file size of reports. If the image is not necessary to the content of the report, it should not be included. Similarly we ask that screenshots be avoided. Screenshots tend to have inadequate resolution and can be difficult to read, making the document fail accessibility standards. They also greatly increase the file size of reports and cause trouble when producing the print version. Tables or other sets of data should be retyped into the report rather than inserted as a screenshot.

Images must be at least 300 ppi resolution for the final print version of the Blue Book report. The print on demand publisher will not accept the report otherwise. Most screenshots and many website images will not have adequate resolution, although there are sometimes ways to increase the resolution of an image if one has the original document from which it was taken. Please contact the GCO staff at bluebook@episcopalchurch.org if you have questions about working with images in your report.

Endnotes

Reports may not have footnotes because they may not have footers. Instead you may insert endnotes by using the endnotes icon in the text editing toolbar. End notes will appear at the end of the Summary of Work section. Endnotes are the best location for referencing internet links in a report, as the contextual information required for links is less distracting in an endnote.

Quoting the C&C

If you need to quote a section of the C&C please use the special icon for quoting the C&C. This ensures that you get a correct quote from the most up-to-date version.

General issues to be aware of:

Including the General Convention year when referencing past resolutions

Please keep in mind that blue book reports are part of the Archival record of the church, and as such are read and referenced in later trienniums; but resolution numbers are repeated each triennium. Therefore, when referencing a past resolution by number the year of that resolution's General Convention should be pre-pended to the resolution number, as in 2018-A003 or 2015-A003 or 2012-A003.

Links

Links to websites frequently expire or break, sometimes even before the report is published, as websites archive documents or otherwise move them. Keep in mind that blue book reports are referenced years later as well. The GCO requests that all links are accompanied by contextual information about the link. Contextual information should include the full link rather than a "click here" option, the organization responsible for the material, the parent website, and the author, title and date of the material if available. The purpose of this context is to increase the chance of finding the information even if the material is moved later. Since all of this contextual information can be very distracting in the middle of the report narrative, it is better to use an end note to input links. Resist putting in a statement that redirects people's attention away from your report. Instead summarize, quote or reference the internet material as needed, then put an endnote on that. People can then find the link with all the appropriate context within the Summary of Work's endnotes.

If, however, the material is essential, rather than putting in a link the group should contact the GCO to discuss attaching the material as a supplement. An example of a necessary supplement would be an updated version of a liturgy which was produced by the group for the General Convention members to read and consider.

Copyrighted materials

Blue book reports are published to the world at large and are not covered by fair use laws. Do not include copyrighted material unless the group has obtained specific written permission to do so.

Supplemental materials

Although allowed on a case by case basis, the GCO does not encourage supplemental materials because they increase the size and complexity of the report. In addition, there can be issues with copyright, privacy, format or translation with supplemental materials. Therefore, we require that you contact the GCO to discuss any supplemental materials you feel are necessary for your report.

Contacting the GCO for help

One of the big advantages of the blue book application is that the GCO staff will be able to login to your report directly to see or edit your report. We encourage you to ask questions about the application or the report content while you are creating your reports. No question is too small. It is better to answer questions and resolve issues in the Summer or Fall before your report is submitted than to wait until after submission when the GCO staff have less time available. The bluebook email goes to all GCO staff members with blue book processing responsibility so that whoever is available can answer your question.

Contact information

bluebook@episcopalchurch.org

GCO: 212-716-6200

Church Center tollfree line: 800-334-7626

Blue Book reference from the 2018 Constitution and Canons

Canon I.1.2 (j) – (m)

(j) Every Commission shall prepare a report, which, together with any minority report, shall be sent, not later than 150 days prior to the opening day of each Convention, to the Executive Officer of the General Convention, who shall distribute the same to all members of the Convention.

(k) The Report of every Commission presented at the General Convention shall:

(1) Set forth the names of its original members, any changes in membership, the names of all those who concur in, and all those who dissent from, its recommendations.

(2) Summarize the work of the Commission, including the various matters studied, the recommendations for action by the General Convention, and drafts of Resolutions proposed for adoption to implement the recommendations of the Commission.

(3) Include a detailed report of all receipts and expenditures, including moneys received from any source whatsoever, and if it recommends that it be continued, the estimated requirements for the ensuing interval until the next regular meeting of the General Convention.

(l) Every Commission, as a condition precedent to the presentation and reception of any report to General Convention in which such Commission proposes the adoption of any Resolution, shall, by vote, authorize a member or members of General Convention, who, if possible, shall be a member of the Commission, with such limitations as the Commission may impose, to accept or reject, on behalf of the Commission, any amendments proposed by General Convention to any such Resolution; provided, however, that no such amendment may change the substance of the proposal, but shall be primarily for the purpose of correcting errors. The name of the member or members of General Convention upon whom such authority has been conferred, and the limitations of authority, shall be communicated in writing to the Presiding Officers of General Convention not later than the presentation of such report to the General Convention.

(m) Every Commission whose Report requests expenditure out of the funds of the General Convention (except for the printing of the Report) shall present to the Joint Standing Committee on Program, Budget, and Finance its written request, on or before the first business day of the session. Resolutions requiring additional expenditures shall be immediately referred to the Joint Standing Committee on Program, Budget, and Finance. No resolution involving such expenditures shall be considered unless so presented and until after report of the Joint Standing Committee on Program, Budget, and Finance.