

# Elderberries

*The Newsletter of the*

*Unitarian Universalist Retired Ministers and Partners Association*

VOLUME XIX

FEBRUARY, 2004

NUMBER 2

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*Elderberries* is published quarterly in November, February, May, and August. Deadline for submitting material is the fifteenth of the month preceding publication.

Material for publication should be sent to Ed Lane (addresses at the left of this page—e-mail preferred if possible).

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## President's Perspectives . . . Joyce Smith

The coming year is an exciting one for UURMAPA. As you will see by other articles in this issue of *Elderberries*, we are well on the way to having a group of people trained to go to the various chapters of the UUMA to make our ministers aware of the issues surrounding financial planning long before retirement comes. Nancy Doughty and Ralph Mero are to be thanked for their work on the program. For being in such a forward-looking denomination, our clergy are surprisingly unlearned in this skill. I must confess that even having been married to an economist, I still don't like the complexities of money management. It is an issue for all of us, both retired and non-retired, because if we have a group of ministers retiring who must, for whatever reason, call upon our sustentation funds, they are quite likely to overburden those funds which are presently sufficient to meet our existing needs. If you know of any minister who does need help now, but may be reluctant to contact Ralph Mero please encourage that minister to use this resource.

Another positive thing that has been accomplished through the hard work of Fred Campbell, our treasurer, is the official granting of a 501 (c) (3) classification that we are a tax-exempt organization. This was a necessary action because our budget was higher than previously, due to the grant money we received from the UU Funding Program. While all previous contributions were tax-exempt they might not have been in the future.

The nominating committee and its chair, Gene Navias, are to be congratulated for their work which was completed much earlier than usual. We have a fine slate of candidates to replace the great work of our retiring board members, all of whom will have served for four years. The report of the Committee will be found in this issue of *Elderberries*.

One concern I have is that the Midwest Conference presented a very interesting program last fall, but it was so lightly attended that the organizers are unwilling to try a conference this year. These conferences are one of the occasions when we get together with colleagues and partners to socialize and share common concerns. If you have suggestions how we might revitalize the conference or suggestions on alternatives that would serve the same functions please let me know.

*Joyce*

## UURMAPA at GA '04

Here are the UURMAPA programs for GA '04 June 24-28 in Long Beach, California. Since some details as to times and places, etc., have not been worked out, watch for them in the May issue of *Elderberries*.

Our annual luncheon will be Sunday, June 27 at noon, as usual, even though the Service of the Living Tradition will be on Friday evening.

One of our special events will feature our colleague, Stan Stefancic (who retires this year) in a program entitled "Harvesting the Wisdom Years: From Aging to Sagging". Stan will draw on the work of Rabbi Zalman Schachter-Shalomi, with whom he has worked closely.

Our second event will be a panel program titled, "Ministry, Retirement, Money Matters and Other Issues". It will deal with the recent surveys conducted by UURMAPA and an important new program being generated as a result.

## Report of the Nominating Committee

Spring Travel plans by members of the Nominating Committee resulted in an early push to canvass the Board and leading UURMAPAns far and wide by phone and e-mail to gain suggestions for positions to be open for election this Spring. This made it possible to complete the slate for election earlier than usual. The Nominating Committee made a sizable number of recruitment calls, learned of a vast variety of reasons why persons cannot serve from an unexpected responsibility for raising grandchildren to a surfeit of ongoing volunteer responsibilities. All, however, expressed great thanks at being remembered and asked. In turn, the Nominating Committee offers sincere thanks to the many who told us of the talents of our members.

The following slate will be presented in a mail ballot for your use in early spring for election to two-year terms:

Secretary: Annie Foerster, Alexandria, KY,

Treasurer: Andy Backus, San Diego, CA

Newsletter Editor: Eleanor Richardson, partner of Peter Richardson, Rockland, ME

Member at Large: Barbara Prairie, partner of Michael Boardman, Berea, KY

Nominating Committee: Ed Lane, Wellesley, MA; Polly Leland-Mayer, Venice, FL

Continuing In Office: President, Joyce Smith; Vice President, Richard Fewkes; Caring Network, Glen Snowden; Member at Large, Nancy Doughty; Nominating Committee Chair: Eugene Navias

The Nominating Committee *Gene Navias*, Chair *Ann MacPherson*, *Polly-Leland Mayer*

## Regional Conferences

*Funds too tight to get to a Regional Conference? For partial scholarships contact Michelle Bentley at the UUA: 617 742-2100 – mbently@uua.org.*

### **PAN SOUTH – March 4-7 2004 Clearwater, Florida**

“Shared Memories” will be the theme of the spring conference in beautiful Clearwater, home of the white sandy beaches.

Author Ed Harris will discuss his new book, *Miracle in Birmingham: A Civil Rights Memoir, 1954-1965*. Come prepared to share the formative experiences of your lives, including “Hilarious and Outrageous Experiences I Have Had” and “Wisdom Learned the Hard Way.”

We will have a day trip to St. Petersburg with choices of museums: The Salvador Dali Museum, the Museum of Fine Arts, or the Holocaust Museum.

Registration (includes meals at the church) is \$100. Home hospitality (benefits the Clearwater church) is \$100—make reservations through the registrar. Alternative accommodations, Hampton Inn Clearwater Central, 4.5 miles from the church—make reservations directly—727 797-8173 or [www.hamptoninn.com](http://www.hamptoninn.com).

Registrar: Larry Hamby, 245 MacDuffie Drive, Athens, GA 30605

### **WEST – April 12-15, 2004 - Vallombrosa Conference Center, Menlo Park, CA**

We have a rich, enriching program planned for next April. Monday evening Ted Webb will lead a dramatic reading of “The President and His Maker” (the “maker” being Elihu B. Washburne), which he developed from his research into the lives of the Washburne brothers. Tuesday Ed Lane will offer two sections of a series titled “Slow the Pace—Savor the Journey” which he has given twice at Star Island. In the morning session he will do the “Overview” followed by discussion. In the afternoon session he will look at the topic as the Transcendentalists, particularly Thoreau and Emerson saw it. Discussion time follows. Wednesday two research scientists from the Institute of Noetic Sciences, Cassandra Vieten, PhD and Tina Amorok, a Clinical Psychology Doctoral Candidate, will offer material from their researches on Transformations in Consciousness, with adequate discussion time for us to exchange thoughts. Odysseys will be offered Tuesday and Wednesday evenings by Richard and Lois Allen and by Joyce Smith. And there will be daily worship services, some free time in the afternoons, and time Thursday to discuss common concerns with the UURMAPA Board, which will be with us. For registration or additional information contact the co-chairs.

Al and Mary Thelander, [thelandr@nccn.net](mailto:thelandr@nccn.net), Co-chairs

## How are you? ... What are you doing? ... Any new publications?

**P**eter Richardson's new book, *The Boston Religion: Unitarianism In Its Capital City*, documents how eight of the original nine Puritan churches in the City and the oldest Anglican church evolved to a Unitarian position. It describes the ascent to a majority religion, the dynamics of its hegemony and its decline, the social, theological, biographical, architectural, literary and historical themes of the Unitarian movement. Each of Boston's 74 Unitarian churches is given an historical sketch with a complete listing of their ministers and meeting houses with locations and dates. There are 139 illustrations. All names are fully indexed and an appendix gives a convenient chronological listing of churches. A second appendix lists the 23 Universalist churches organized in the city. You can order a copy from Peter at 22 Mechanic St., Rockland, ME 04841 or by e-mail at [PTEMR@aol.com](mailto:PTEMR@aol.com). Cost is \$29.95 plus \$3.50 for mailing.

**A**nnie Foerster's new book *For Praying Out Loud*, is a plea for the use of inclusive prayer language at public gatherings because of the growing religious diversity of participants. The book includes a rationale for creating a public-prayer language, a how-to-do-it section and a collection of about 75 prayers for all occasions from peace rallies to ordinations. Skinner House Books

Annie and her partner Mary Ball bought a small motel last year as an investment. It has evolved into an extended-stay facility (they call it an apart-tel) for people in transition. Turns out its a new kind of ministry as many of these people are alienated from family or community. They've been asked to do everything from marriage counseling to driving kids to school when they miss the bus. It's a daily soap opera and gives them a sense of contributing to people's live.

**R**on Mazur has a new book out: *Free Jesus; Liberate America*. He feels that Americans are victims of fundamentalist religious ideologues on a holy crusade to dominate the world with "preventive" military force. Freeing Jesus and resisting pre-emptive war are the missions of this book. Order at 877 823-9235 or on line at [www.iuniverse.com/bookstore](http://www.iuniverse.com/bookstore), \$10.95. Ron's website is [www.freejesus.com](http://www.freejesus.com).

**D**avid and Karen Van Strien were honored at GA '93 by the UU's for Justice in the Middle East for their work for Palestinian human rights and a just peace in the Middle East. David was also the recipient of the 2003 Humanist Social Justice Award.

**J**im Hunt highly recommends the book *Prisoner of Liberté* by Judit Gellérd, the story of Transylvian martyr Imre Gellérd whose experiences bear a marked similarity to those of Dietrich Bonhoeffer..

**C**lark Olsen had been doing some training/consulting work for "Leadership Dynamics International." a small company in Greenville, SC which does training and consulting around strategic planning, senior management teamwork, workteam development, supervisory and management development, innovation, changing work processes, etc. When the owner died his widow asked Clark to take over running the company "in the interim"—but the new owner has asked him to stay two years to help him run the company. Often the training includes experiences in "ropes courses" and whitewater rafting!

Meanwhile his partner Anna has been busy nurturing a new "cluster" organization of Western North Carolina UU congregations.

**R**ex Styzens writes that he is enjoying the luxury of the California State University system's gift to those of us who have survived past 65. The cost of a semester's full tuition for seniors at any CSU is currently the grand total of \$4. I have been enrolled, half-time, for the past three years and now as a grad student in philosophy. I feel I am slowly catching up with some of the philosophical developments in the 20th Century. A lot has happened in the half century I have been out of the classroom, and I am glad to have a chance to learn about it. Please spread the word. It's gotta be the best bargain in the world!

## Financial Education Program

In response to the findings of the recent survey that Joyce Smith detailed in the last issue of *Elderberries*, I have been working with Ralph Mero to recruit 8 to 9 ministers who, on March 5-6 will be trained about many aspects of finances and financial planning by Ralph and a team he is recruiting. Once trained, these minister "educators" will in turn make a 3-hour presentation at local UUMA chapter meetings this fall and in the spring of 2005. Thus far Robbie Walsh, Jim Sherblom, Paul Johnson, Marni Harmony, Fred Campbell, Richard Nugent and David Weissbard have agreed to be our educators.

UURMAPA is fortunate to have a grant from the UUA Grants Panel that will allow us to proceed with our Financial Education Program that the UURMAPA Board believes will assist our active colleagues as they move closer to retirement. The UUMA Socially Responsible Investing Committee is also engaged in an effort to educate colleagues about social responsible investing, so we have joined in with them in a CENTER'S program they are offering.

*Nancy Doughty*

## News from the Office of Church Staff Finances

**M**emorial gifts to the UUA are deposited to the Living Tradition Fund, a separate fund to provide financial assistance to ministers in need, especially those who are retired, and to their surviving families.

It won't be news that the negative return on investment in the stock market these past three years has reduced the income we receive from the endowment funds that underlie our UUA ministerial aid grants. We have to scrutinize every request for help more closely now, and to prioritize our financial aid grants. Fortunately we are still able to help retired ministers and their survivors to the extent needed.

**N**ew Fidelity Funds: Deciding how to invest among various mutual funds is always vexing, unless you're one of those folks who enjoy the fine print. A new family of funds has been added to the portfolio in the UUA Retirement Plan, and the salient feature is that once you pick one fund, you don't have to do anything else. The fund managers shift the balance between stocks and bonds as you age and according to your estimated date of retirement, so that it becomes more conservative as the years go by.

A person expecting to retire in 2010 would pick the Fidelity Freedom Fund 2010. Someone expecting to retire in 2018 would pick the FFF 2020. The same for 2030, and the system works all the way to 2040.

But what if you are already retired? There is a Fidelity Freedom Income Fund appropriate for those who are already retired, and this fund contains a small portion of stock funds but is largely weighted toward producing income. Unfortunately, the Fidelity Freedom Funds don't seek out stocks and bonds on a socially responsible basis, so perhaps one might use them for only a portion of one's investments.

Retirees as well as persons still employed persons are finding the concept of a "target maturity" fund attractive, since it simplifies their investment decisions. More information about the Fidelity Freedom Funds is available from the Fidelity phone representatives at 800/343-0860 or <http://www.fidelity.com>, or from Joyce Stewart at 617/948-6421, [jstewart@uua.org](mailto:jstewart@uua.org).

**T**he UUA Office of Church Staff Finances is again able to offer Winter Heating Grants in the amount of \$250 per household to retired UU ministers and their surviving family members who need this financial help. No information about income or expenses will be required, only the indication from retired colleagues or immediate family that they would like to receive one of the grants. We expect about 40 people to apply. If you are interested, call or write to Ralph Mero in the UUA Office of Church Staff Finances, 25 Beacon St. Boston, MA 02018, [rmero@uua.org](mailto:rmero@uua.org), 617/948-6404 or 948-6421.

## In Memoriam

**The Reverend William Jennings Petersen, Jr.** died October 7, 2003. Surviving partner: Mary Ann Petersen, 4939 Deerwood Drive, Santa Rosa, CA 95403.

**The Reverend Dr. Robert L. Zoerheide** died November 2, 2003. Surviving partner: Jean Zoerheide, 830 W 40th Street, Apt. 107, Baltimore, MD 21211-2121.

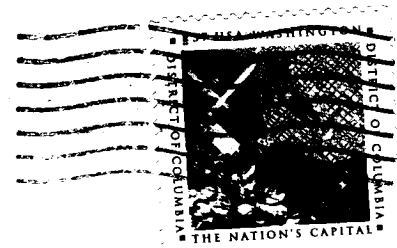
**The Reverend Malcolm R. Sutherland** died November 19, 2003. Surviving partner: Mary Anne Beaumont Sutherland, 6 Timothy's Lane, South Brooksville, ME 04617.

**The Reverend Norma G. Veridan** died January 14, 2004. Messages of remembrance may be sent to her family as follows: Milo Velimirovic and Ingrid Iverson, 122 S. 16th Street, La Crosse, WI 54601; Mira Velimirovic and Max Pross, 407 Sycamore Road, Santa Monica, CA 90402; Nada Velimirovic & G. Denise Stripling, 627 Santa Ray Ave., Oakland, CA 94610.

**The Reverend Duncan E. Littlefair** died January 17, 2004. Deceased partner: Gertrude Backes. Messages of remembrance may be sent to his five children at Fountain Street Church, 24 Fountain Street, NE, Grand Rapids, MI 49503.

**The Reverend John W. Brigham** died January 23, 2004. Surviving Partner: Anna Louise Dege Brigham, 2604 Chestnut Street, Quincy, IL 62301-3524.

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