

1 **Unitarian Universalist Retired Ministers and Partners Association Minutes of**
2 **Zoom Conference Board Meeting September 15,2021**

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4 Board Members Present: Susan Rak, Ned Wight, Gloria Perez, Richard Speck, Jaco ten Hove,
5 Millie Rochester, Ann Schranz, Anne Spatola, Wayne Arnason

6 *Note: Board decisions are in bold type. Action items are in red italic type.*

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8 Opening words read by Gloria Perez from a posting by Dr. Candice Nicole for setting a location
9 for white allies having a meeting to discuss a social justice issue.

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11 Standing reports: Susan suggested testing a different approach to going through the reports.
12 We were asked only to highlight or update points from the circulated reports and refer
13 discussion until later in the meeting as business items.

14 Secretary-Gloria Perez: **The minutes from the August 18,2021 meeting were approved.**

15
16 Treasurer-Richard Speck: **The treasurer's report was approved.** There were no questions about
17 the report. We will meet the budget for income, and we are under-spending at the moment.

18
19 President – Susan Rak

20 Points from Susan's report will be discussed later in the meeting.

21
22 Vice-president – Ned Wight

23 Marni Harmony has agreed to help with the Creative Sageing/Welcomes for our segment
24 during GA. He also asked for suggestions for a third person to add to the planning group. Ned
25 asked if there is lore about determining the level of interest in updating the list of and the
26 support of the peer support groups. *Susan suggested they talk off-line about it.*

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28 Conferences - Anne Spatola

29 There will be a meeting later for the Winter Conference. Anne is working with Wooden on
30 some of the convener tasks.

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32 Member at large UUMA/UUA Liaison – Wayne Arnason

33 There will be discussion later in the meeting regarding questions about the points in his report.

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35 Elderberries – Jaco ten Hove

36 Jaco asked that we be always thinking about content for Elderberries. The copy deadline for the
37 Winter edition is Oct 15th but he needs to have ideas well before then. Millie offered to
38 contribute something for the edition when she has information regarding the area connectors.

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40 Connections chair – Millie Rochester

41 Millie has had additional people declining to become Area Connectors. Janet Newman agreed
42 to be an Area Connector. Ann Schranz and Millie offered suggestions to modify the Connections
43 program. The specific suggestions can be found in Millie's report to the Board.

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Connections assistant - Ann Schranz

Ann would like a decision about memorial services being posted on our website. **The board approved.**

Nominating Committee - Barbara ten Hove

The new committee met at the end of August and looked at available upcoming positions. She thinks the slate will be fully in place by April 15th. Barbara will be leaving the chair position at the end of this year's term and a new chair will be chosen by the committee. Along with receiving suggestions from the board, the committee does look at the newly retired persons as possible nominations for a slate of nominees. If someone leaves the board midterm, it is the board's responsibility to fill the open space. Judy Gibson has provided job descriptions for all board members and asked the board to check the descriptions for any tweaks or changes that need to be made. She would like changes to be sent to her. There was a question about there being a pipeline of potential nominees that carries on from one committee to the next. There is a spreadsheet listing leadership for the last 15 years. As Sue Redford Campbell is the scribe now, she will keep an eye on the bylaws to make sure that we are complying. The open positions coming up for the next term are Secretary, Treasurer, Conference Coordinator and two positions on the Nominating Committee. Diane Miller is finishing Wayne's term. The team is looking at diversity, including partners. The committee will be attending the conference, but recognizes it is definitely harder to do its work during a zoom virtual conference. Barbara expressed gratitude to the board for the work it does.

Matters for discussion:

Fall conference-

Anne has briefed us on what we need to be doing.

Speaking assignments:

Susan will be giving a brief welcome on Monday identifying the board members with name and position, possibly flashing a picture of each one. Maybe put in a musical background with the pictures and names. There was discussion about how to introduce the small groups, Barbara Child's Handbook and the small discussion group about a retired ministers chapter of UUMA . Anne stated that it would be best if everything were recorded.

Content of UURMaPA Board time (currently called "At Your Service")

Items discussed for the use of this time

- Highlight what we do
- The future of our conferences...virtual vs in person acknowledging that many groups are facing these same issues and that there might be an entity which does these kinds of conferences in a package form, having the capacity to do a combination of virtual and in person event. Possibly a change in the structure of large conferences twice a year. How might we be able to serve the membership well creating and using other approaches?

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- How to approach these topics in 30 minutes, presenting the kinds of conversations we have had with the thinking and decisions we have had to make during this past year or so
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- The possible forming of a task force from this segment to brainstorm about conferences in the future
- 91
- **Susan will structure this piece of the presentation, maybe change the name**
- 92
- How the presenting of a proposal to create a Retired Ministers Chapter of the UUMA might happen. Wayne included a document in his Board Report listing the pros and cons of this chapter. Ned gave some feedback to which Wayne would write a statement, send to Ned to see if Wayne captured Ned's points and then send on to the board for consideration. Other ideas regarding local retired ministers being involved with local UUMA chapters in order to continue the accumulated wisdom, retired ministers not having as much in common with currently serving ministers were also discussed and can be included in future drafts of a new document for presentation to the board.
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101 The board also discussed concerns raised in conversation by Wayne Arnason with Melissa Carvill-Ziemer regarding the Keynote Speaker for the Fall Conference, Rev Bruce Marshall. Two UURMaPA members had written to Melissa saying that they would not be attending the Conference because of Rev. Marshall's history of misconduct. When Marshall's name was suggested as a theme speaker, the Planning Committee Chair was fully informed of this history. Wayne provided the historical facts of Marshall's conduct, suspension from ministerial fellowship, and his work with the MFC to become reinstated. Viewpoints expressed in the discussion included:

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- Communication about this kind of history is not always full
 - The people harmed by a minister's misconducting is not always healed
 - The core of who we are as UUs is the process of penance, reconciliation, and restoration
 - He has shown penance
 - The current system is not always healthy in regard to penance, reconciliation, and restoration
 - Uninviting him to speak is not an option
 - Action? Let it go and wait to hear from someone? Would acknowledging the history create a social media storm? Shall we consider the possibility of this type of thing happening for a future conference? How shall we respond if we receive some questions about this choice at the end of the conference? Vetting of prospective speakers? Having conversations about this type of issue for future conferences? We will. Should planners be aware of these kinds of issues?
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122 In the discussion, points were made about:

- mixed feelings about how Marshall gave a sermon on Love to the congregation where he had misconducted.
 - Respect for the standing Debora Pope-Lance has in these matters albeit a bit more absolutist in her approach to them
 - It was noted that we were struggling with the situation and that in the struggle we were trying to be as fair as possible to the situation. We will have continuing conversation on the agenda for the next meeting.
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130 Winter Conference
131 Virtual? If we hold it in person, could we use Fred Wooden's church?
132 Board retreat
133 Shall we ask for a refund or change the reservation to 2023? There is a deposit of \$2500 at the
134 Franciscan Retreat Center. If we don't hold it in 2023, we will lose the deposit.

135
136 The next meeting date will be changed from the third Wednesday in October to October
137 13,2021 because of timing conflict with the Fall Conference.
138 The rest of the items up for discussion were tabled for now.

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140 Respectfully submitted by Gloria Perez, Secretary

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142 **Board Reports**

143 **President - Susan V Rak**

Notes of Condolences sent to survivors of recently deceased UURMaPAns

checked UUA "intent to retire" spreadsheet from last spring to see if retired credentialed religious doctors inadvertently were added to UURMaPA - found only one. notified Patt Herdklotz

Ordered a copy of "Unitarian Universalists of Color: Stories of Struggle, Courage, Love and Faith" but it will not be here for a few weeks, so will not be able to gauge its usefulness for our discussion. If others have it already, I will be content with whatever decision we reach as a Board.

In preparation for the Fall Conference, there are items I am working on that concern us as a Board, and I welcome your suggestions on any and all:

- "Greetings from UURMaPA Leaders" on day 1 - Planners want just two minutes or so. I will offer a few words of "welcome" from the president, but who else might need to take a turn and offer a few words?
- Also, on Day 1 a presentation on the new handbook ("Former Minister's Partner, the Former Minister, and the Current Minister", etc.") is requested. Barbara Child is being asked to take the lead on this, as a "workshop"/small group session.
- there will be one "small group" session on Day 3 to introduce the idea of a "Retired Ministers' UUMA Chapter"
- UURMaPA "At Your Service", also on Day 3- usually consists of a spiel from the Prez about what we do or offer our membership. We have about 30 minutes for this.
 - What are the areas we should highlight in particular? What is the area most needing a boost right now? What is essential?
 - And as has been done in the past, I would love to have others take a moment to promote their area of focus or lift up a coming project. IT shouldn't just me talking on and on. We could, I think, pre-record these and knit them together... I'd leave that to the Zoom Tech/webmaster (a congregation I just did a service for called this role the "Z-jay")

And I updated the listing information for UURMaPA with the UUA - they sent an email asking us to renew our status, and as they are inaugurating a new system, related organizations were asked to supply more information/documentation showing linkage to UUism and its principles. I included a copy of our Bylaws and Procedures with the updated information.

145 **Vice-President- Ned Wight**

146 **Report to the UURMaPA Board from Vice President Ned Wight—9/15/21**

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148 Updates on my workplan for 2021-2022 (based on VP job description) appear *in bold italics*:

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150 **Arrangements for UURMaPA member lunch**

- 151 • Tentatively planning for day after SOLT in Portland, June 2022
- 152 • *9/11 contacted the GA Planning office to update me as their UURMaPA contact person*
- 153 • Plan to request space as soon as I receive notice from GA Planning in December 2021

154

155 **Attend Service of the Living Tradition and survivor's luncheon** (during GA)

- 156 • Plan to attend

157

158 **Propose workshops during Ministry Days or GA**

- 159 • Will solicit workshop ideas in January? Article in the next Elderberries?

160

161 **Creative Sageing Award selection group (3 people)**

- 162 • *Marni Harmony is willing to be part of this group; I welcome suggestions for another name*
- 163 • *I reviewed the UURMaPA website page listing previous recipients*

165

166 **Review financial accounts with the Treasurer**

- 167 • Not sure what this means; I'll be in touch with Richard

168

169 **Organize peer support groups**

- 170 • Inventory groups currently running
- 171 • Determine interest among retirees in 2019, 2020 and 2021
- 172 • Select conveners/facilitators and get these groups going
- 173 • *Sent e-mail to Keith Kron's office asking to receive notification of UU ministerial retirees; waiting to hear back from Sarah Gabbey*
- 174 • *Do we have a list of 2020 and 2021 retirees to whom we can send an invitation to join a peer support group?*

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178 **Secretary – Gloria Perez**

179 I sent the approved August board minutes to Duane for posting on the website on September
180 22,2021. I am reading stories from Unitarian Universalists of Color. I also have been studying
181 Widening the Circle of Concern for the Justice For All Committee in my congregation. It is being
182 an absorbing adventure.

183

184 **Treasure Report-Richard Speck**

185 Please see my spreadsheet for details. It is in both xlsx and pdf formats. I have been mostly
186 working on the conference for this month. We set up a process for people to register and pay
187 using Square and Zoom. I have worked with Roger Rochester to make sure we have accurate

188 information for the registration. We now have over 140 people registered. I am also working
189 with Jon Clane as our tech support person. I am pulling together the three musical pieces for
190 the conference with our virtual choir. I am deeply involved in the programming for the
191 conference. I am sending another donation to the UUMA Endowment in honor of 13 ministers
192 who have died since I last sent a check to the UUMA. See you Wednesday.

193 Richard

194 See addendum for the spreadsheets

195 Elderberries-Jaco ten Hove

196 It's been a bit of a struggle building a set of likely suspects for the next issue (copy deadline of
197 Oct. 15), which could come in at just 12 pages—altho I said that about the Summer issue and it
198 ran to a full 16 anyway.

199 *Possible cover stories* (perhaps depending on which has the best accompanying pic or graphic)
200 are:

- 201 • Millie's report on the evolution of UURMaPA's Connections realm.
- 202 • Keith Kron on his restart of the Targeted Ministry Program, along with at least one
203 interview of someone who's been active in it after taking the training. **(Please send me
204 any leads on who might fit this bill!)**
- 205 • The UUMA's late summer's 50th Ordination online gathering, which I happily attended.
206 From the recording of it I've been writing a summary of the five personal statements.
207 (But this starts to feel a lot like other recent cover leads, so I'd rather not feature that
208 kind of story as the lead, again, if I can help it.)

209 *Other features brewing:*

- 210 • Webmaster Duane's latest montage of board member headshots (see attached; I'll add
211 names)
- 212 • Diane Miller's reflection on the transition from being able-bodied to being less so
- 213 • Winter conference update
- 214 • Possible review of Tom Owen-Towle's latest book (on death)
- 215 • An action photo, such as it is, of my neighbors Peter Luton and Mel Hoover at the local
216 Bellingham Bells baseball game, which we three enjoyed together.
- 217 • Plus regular items, such as the president's column, a financial message from the OCSF,
218 not to mention a quote and cartoon— suggested candidates are welcome!

219 What I don't have (yet?) are any candidates for the "What Brings You Joy" and "What's Up
220 With..." columns, so again, any leads would be most welcome, especially of any partners.

221 See y'all soon. Cheers, —Jaco

222

223 **Connections-Millie Rochester**

224

225 **Report to the UURMaPA Board**

226 **September 2021**

227 **Millie Rochester**

228

229

230 Here's a summary of what I've been up to Board-wise since our last meeting.

231

232 • Sent Ned the contact information for Sarah Gaddey, who sends out the spreadsheet, as
233 promised (sgaddey@uua.org)

234

235 • Ordered the book Unitarian Universalists of Color: Stories of Struggle, Courage, Love and
236 Faith and began reading. It took quite a while to arrive, but I'm about half-way through,
237 finding it very interesting.

238 • Reached out to eleven more UURMaPA members inviting them to become Area
239 Connectors; have gotten one acceptance (Janet Newman of the Ohio Meadville Area –
240 hurray!) as of this writing.

241 • Had a very productive conversation continuing our brainstorming about the possible
242 restructuring and recruiting of Area Connectors. In the interest of giving you time to
243 consider them ahead of our meeting, these are our thoughts:

244

245 ○ Although members would still be listed according to geographic area, and Area
246 Connectors' names would still be in bold type, the general pools of volunteers would
247 be divided according to (in North America) East and West; so Western and Eastern
248 Canada would be part of the West and East, respectively. In practical terms, some
249 "Areas" might not have anyone listed, and some might have more than one,
250 depending on who has offered to serve.

251

252 ○ Twice a year (e.g., spring and fall) the Connections Chair would assign each
253 volunteer a group of people in to contact for a routine check-in.

254

255 ○ Connectors would notify the Connections Chair of any changes they learn, of contact
256 information or special needs, through connections@uurmapa.org or members could
257 notify me directly at that address. I would pass along updates to contact information
258 to the Membership Coordinator.

259

260 ○ The Connections Chair then communicates with the East or West pool of volunteer
261 Connectors to determine who will be in touch with the minister or partner.

262

263 ○ We envision advantages of this system:

264

265 ✓ Anyone who might already have a relationship with particular members can
266 be in contact with them as a Connector, whether or not they are
267 geographically nearby.

268

269 ✓ The distribution/division of labor might be more equal, since now some Area
270 Connectors have significantly fewer members to contact than others.

- 271
272 ✓ Volunteers could be located wherever they are, rather than restricted to
273 certain geographic areas.
274
275 ✓ Updates to the Membership Coordinator would be sent from one point
276 person rather than several, hopefully leading to better accuracy.
277

278 We welcome your feedback and suggestions.

279
280 Respectfully, submitted,
281 Millie Rochester

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283 **Connections Assistant- Ann Schranz**

284 Hi, everyone. Here are a few highlights. I received "Unitarian Universalists of Color" but have
285 not started reading it yet.

286
287 I talked with Millie about how we might make the Area Connector function more flexible and
288 responsive and have more uniform quality. Janet Newman agreed to serve as an Area
289 Connector in the Ohio Meadville area. Yay!

290
291 Since last month's board report, I posted notices to UURMaPA-Announce about the deaths of
292 these ministers: Carol Rosine, Jan Knost, Charles Reinhardt, and Walter Braman. Eleanor Smith
293 Duhamel has also died, but the UUA has not sent its notice. That's what I work from, so I
294 haven't yet sent a notice about Eleanor to UURMaPA-Announce.

295
296 Part of my role is to make sure each Area Connector reaches out to the family of recently
297 deceased UURMaPA members. I haven't done that recently because I haven't been sure the
298 latest directory properly identifies who is an Area Connector and because there are open
299 Connector positions.

300
301 I received helpful lists of deceased members from Roger Rochester and from Roger Fritts (for
302 memorializing in the upcoming conference). I'll compare their lists with mine and try to get in
303 synch.

304
305 I uploaded my spreadsheet (inherited from Cathie Severance, who inherited it from Judy
306 Gibson) to Google Drive. I gave "viewing" permission to the board and to Duane and to Roger
307 and to Jay. Down the road, maybe appropriate folks can update the same file, stored on Google
308 Drive, though I'd have to change certain permissions from "viewer" to "editor."

309
310 I have not welcomed any newly retired folks. I don't have addresses for the people listed as
311 retirees in the last Elderberries who aren't UUMA members. I haven't seen any of the
312 spreadsheets which apparently contain names of people who filed the Intent to Retire form.

313
314 Best regards,

315
316 Ann Schranz

317
318 **Conferences-Anne Spatola**

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320 not started reading it yet.

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347 spreadsheets which apparently contain names of people who filed the Intent to Retire form.

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350
351 Ann Schranz

352
353 **Member-at-Large/Liaison to the UUA and UUMA-Wayne Arnason**

354 **Report of the At-Large Member for UUMA/UUA Relations - Wayne Arnason September 13,**
355 **2021**

356 I attend at least one regular meeting besides our Executive Meeting in this liaison role
357 with the UUA, and that is the Advisory Team to the Office of Church Staff Finances at UUA.
358 There are about ten organizations represented at these quarterly meetings where we hear

359 updates from the UUA staff on financial issues for religious professionals and offer our advice or
360 questions. My full notes from the August 25 meeting are available to anyone who wants them.
361 This meeting included some check-in time for each representative which mostly focused on the
362 angst around re-opening decisions.

363 In brief, the key updates and issues we heard about were:

- 364 - Plans for hiring a new consultant to work with congregations on compliance with UUA
365 standards and best practices for onboarding personnel.
- 366 - Plans for the next update of the new Compensation Guidelines for all professionals, as
367 well as for some additional positions that are newly developed or described in a
368 minority of congregations.
- 369 - Plans to create a “Just Compensation Congregations” recognition program.

370

371 In my role I extended an invitation to the UUMA Executive Team and the UUA President
372 to participate in our Fall Conference. In following up with Melissa Carvill-Ziemer from UUMA, I
373 was alerted to the fact that at least two UURMaPA members had expressed reservations about
374 participating in the conference because Rev. Bruce Marshall is our theme speaker. Some
375 members of this Board may not be aware that Rev. Marshall was “suspended” from fellowship
376 as a UU minister for a period of at least one year in 1997. This decision by the Ministerial
377 Fellowship Committee was made in response to a sexual ethics boundary violation. Marshall
378 was going through a divorce and initiated a relationship with a member of his congregation
379 who was also going through a divorce. The story became public in a Cleveland newspaper and a
380 UUMA member brought a grievance which was referred to the MFC.

381

382 Marshall was contrite and resigned from his parish ministry. He involved himself in other
383 career directions. Ten years along, he applied to have his suspension lifted, interviewing with
384 the MFC, and documenting the ways in which he had fulfilled the requirements the MFC had
385 imposed. He was restored to full fellowship. Since then, he has worked as an interim minister,
386 a transitions consultant for UUA, and as a Chaplain at Ryderwood Senior Living in Maryland. He
387 is currently retired.

388

389 When I suggested Rev. Marshall might be a theme speaker for Fall 2021 to Barbro
390 Hansson, I fully disclosed this history to her. She had several nominees to consider, and
391 Marshall was her choice. The Board heard about this decision at one of the spring 2021
392 meetings. No formal objections have been raised to any UURMaPA leaders. Melissa Carvill-
393 Zeimer alerted me to the reservations she has heard expressed. I briefed Susan Rak and Anne
394 Spatola about the concerns, which they were hearing about for the first time. We all felt that
395 the Board should have a briefing on the possibility that some UURMaPA members may hesitate
396 to register or participate in the theme sessions because they feel it’s inappropriate for any
397 minister with a history of crossing an ethical boundary to have a leading role in a conference
398 like ours, regardless of the way the violation was handled by the MFC and regardless of
399 whether the minister is back in full fellowship. Any concerns we have can be discussed at this
400 meeting.

401

	2021 Budget	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	2021 Total	Budget vs. %
INCOME															
Member Donations	\$10,000.00	\$945.00	\$410.00	\$190.00	\$200.00	\$0.00	\$200.00	\$0.00	\$100.00					\$2,045.00	20.45%
Member Donations PayPal	\$4,000.00	\$1,933.00	\$105.00	\$5.00	\$5.00	\$55.00	\$5.00	\$5.00	\$5.00					\$2,118.00	52.95%
Memorial Gifts	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27,179.18	\$0.00	\$0.00	\$0.00					\$27,179.18	1358.96%
Conference Fee Income	\$6,000.00	\$0.00	\$0.00	\$80.00	\$150.00	\$0.00	\$3,735.00	\$0.00	\$0.00					\$3,965.00	66.08%
Conference Fee Income PayPal	\$22,000.00	\$60.00	\$360.00	\$2,200.00	\$1,840.00	\$273.43	\$0.00	\$0.00	\$0.00					\$4,733.43	21.52%
GA Luncheon Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
UUMA Subsidy	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Scholarship Income	\$500.00	\$40.00	\$120.00	\$450.00	\$360.00	\$0.00	\$0.00	\$0.00	\$0.00					\$970.00	194.00%
Other Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Total Regular Income	\$45,500.00	\$2,978.00	\$995.00	\$2,925.00	\$2,555.00	\$27,507.61	\$3,940.00	\$5.00	\$105.00					\$41,010.61	90.13%
EXPENSE															
On-Site Board Meetings															
Transportation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Room and Board	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Hospitality	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Total Board Meetings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Conferences															
Attendee Fee Refunds	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Room and Board	\$21,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Speakers	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00					\$500.00	100.00%
Music	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$70.00	\$0.00	\$0.00	\$0.00					\$70.00	35.00%
Technology Support	\$3,000.00	\$0.00	\$0.00	\$0.00	\$402.25	\$2,500.00	\$0.00	\$0.00	\$0.00					\$2,902.25	96.74%
Hospitality	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Scholarships	\$1,000.00	\$0.00	\$0.00	\$0.00	\$40.00	\$0.00	\$0.00	\$0.00	\$0.00					\$40.00	4.00%
Misc.	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$0.00	\$0.00					\$150.00	150.00%
Total Conferences	\$26,600.00	\$0.00	\$0.00	\$0.00	\$442.25	\$3,220.00	\$0.00	\$0.00	\$0.00					\$3,662.25	13.77%
General Assembly															
Luncheon Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Transportation-President	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Transportation-Vice President	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Room and Board	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Technology Support	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
GA Fees & Misc	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
New Member Welcoming Gifts	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$894.40	\$0.00	\$0.00					\$894.40	178.88%
Total General Assembly	\$1,900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$894.40	\$0.00	\$0.00					\$894.40	47.07%
Communications															
Elderberries Publication	\$4,000.00	\$0.00	\$967.01	\$0.00	\$0.00	\$970.43	\$0.00	\$0.00	\$0.00					\$1,937.44	48.44%
Fundraising Appeal	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Peer Support Groups (video calls)	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Website	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Zoom	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Database Management	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Total Communications	\$6,400.00	\$0.00	\$967.01	\$0.00	\$0.00	\$970.43	\$0.00	\$0.00	\$0.00					\$1,937.44	30.27%
Other Expenses															
Retirement Planning Seminar Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	
Saging & Unsung & Navius Awards	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00					\$500.00	50.00%
Rainbow Project	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Postage	\$200.00	\$0.00	\$0.00	\$55.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$55.20	27.60%
Connections Network	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Memorial Gifts - UUMA and Others	\$2,000.00	\$750.00	\$0.00	\$0.00	\$0.00	\$450.00	\$0.00	\$0.00	\$0.00					\$1,200.00	60.00%
Donations to the Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25,000.00	\$0.00	\$0.00					\$25,000.00	
President's Expense	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
PayPal Fees	\$400.00	\$3.65	\$0.00	\$90.81	\$76.52	\$2.20	\$0.63	\$0.63	\$0.63					\$175.07	43.77%
Bank Expenses	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Board Misc.	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00					\$50.00	25.00%
Total Other Expenses	\$5,550.00	\$753.65	\$0.00	\$146.01	\$76.52	\$952.20	\$25,000.63	\$50.63	\$0.63					\$26,980.27	486.13%
Total Expense	\$40,450.00	\$753.65	\$967.01	\$146.01	\$518.77	\$5,142.63	\$25,895.03	\$50.63	\$0.63					\$33,474.36	82.75%
Profit/Loss	\$5,050.00	\$2,224.35	\$27.99	\$2,778.99	\$2,036.23	\$22,364.98	-\$21,955.03	-\$45.63	\$104.37					\$7,536.25	149.23%
Ending Account Balance															
Endowment	\$58,000.00	\$64,765.43	\$66,030.91	\$66,233.09	\$68,159.25	\$68,850.45	\$94,435.10	\$94,435.10	\$94,544.78						
Money Market	\$20,000.00	\$19,210.40	\$19,211.87	\$19,213.50	\$19,215.08	\$19,216.71	\$19,217.53	\$19,218.35	\$19,219.17						
Checking	\$6,000.00	\$19,740.87	\$20,885.87	\$21,660.32	\$25,400.73	\$48,801.09	\$25,351.26	\$25,301.26	\$25,401.26						
Total	\$84,000.00	\$103,716.70	\$106,128.65	\$107,106.91	\$112,775.06	\$136,868.25	\$139,003.89	\$138,954.71	\$139,165.21						