

Unitarian Universalist Ministers and Partners Association
Zoom Board meeting—December 21, 2023

Board Members Present: Susan Rak, Ned Wight, Gloria Perez, Richard Speck, Barbro Hansson, Joy Atkinson, Wayne Arnason and Ann Schranz

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

Chalice Lighting/Opening Reading from the Chalice Book —“We rejoice....”

Consent agenda

All reports accepted as distributed. The reports from the Connections Chair and the Connections Assistant were modified with updates.

MATTERS FOR DISCUSSION

Conferences

Fall Conference wrap-up – Barbro sent us her report.

Spring Conference – The planning team is set up. In the January meeting, the planners will discuss whether new roles need to be added; a theme speaker for the theme “elder service is our prayer”. The conference registration fee will be \$45 per registrant. There will be three PODs. ***Susan will review a list of suggested Odyssey presenters.*** Barbro asked that she receive the list by the end of January, in time for their Feb. meeting.

We discussed compensation for Jon Claney’s technical help beyond the conferences; the dates for the Fall Conference in 2024; we may not continue with Seabeck as a Conference POD; the number of small group sessions.

Follow-up on UURMaPa Board Retreat 2023 decisions:

Updates on the IDI for Board members – The Board decided to accept the proposal from Sue Sinnamon to administer the IDI and make a commitment to do it in 2024, engaging the new Board members. We discussed finding accountability partners once we have gone through the process.

Ministers of Color Conversations – Wayne asked to hear from Board members with whom we might be willing to have a pre-retirement conversation about their circumstances in becoming part of UURMaPA.

Membership Director/Membership Database System – Richard and Jon Claney will be having a serious conversation about going forward with going to a different data keeping system. Barbro suggested Janet Onnie as a possible candidate for the position of Membership Director. Richard will talk with Janet Onnie about the job description, which may change if we go to a different data keeping system. Susan will prepare info for an ad in Elderberries for the position.

We discussed the security of the Directories - Membership and Area Connections. **Susan will talk to Jaco about this issue. Changing the password will be the first step. Each Board member will be able to give out the new password. Ann will put a notice in Elderberries about this change.** [LATER NOTE: This action item is on hold, pending further considerations.]

The proposed budget for 2024 was adopted. (See below).

Respectfully submitted, Gloria Perez, Secretary

REPORTS

Susan Rak, President

For my part, I was to test my access for Announce by sending a "help wanted" for the Membership Coordinator position. Clearly, I missed doing that. And now reviewing the Job Description, I felt that it is kind of hanging in the balance with the decision to go with a new system. I will be reaching out to Patt to acknowledge this delay in filling in her slot.

Also, earlier this month I received a letter from Susan LaMar who is resigning as Historian. So now there are two positions to fill. Attached is Susan's letter, the Historian Job Description, and a slightly revised job description for the Membership Coordinator (less all the procedural instructions that appear on the website version of this document).

Report to the UURMaPA Board from VP Ned Wight—12/21/23

Here are items on my workplan for 2023-2024 (based on VP job description). Most recent activity is indicated in ***bold italic type***.

Arrangements for UURMaPA gift distribution

- In follow-up re 7/10 event, received words of thanks from a few ministers and partners about receiving the book.

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

- I attended the service in Pittsburgh (singing in the choir) and the lunch, which took place on Thursday, June 22. It was rewarding to speak with surviving spouses.

Propose workshops during Ministry Days or GA

- Board decided last year this was not a function of the UURMaPA Board.

- I sent out a notice from Don Plante regarding proposing a workshop for GA2024. Richard proposed “a panel presentation on easing into retirement for religious professionals. We could discuss what worked and didn’t.” Wayne seconded this idea, writing, “It would be a step towards our stated interest in exploring how we might offer services or support to other religious professionals beyond ministers. I’d be able to offer some ideas for how to approach that.” The GA Theme is “Love Unites, Stories Ignite” and they’re soliciting pre-recorded programs 90-minutes or less for on-demand access. Proposal deadline is January 12, 2024, and video submissions are due April 30. Here is a link to the full proposal guidelines: <https://www.uua.org/ga/program/contribute/proposing> We should discuss.
- ***Should confirm status of workshop proposal at our December meeting.***

Creative Sageing Award selection group and Unsung UURMaPAn Award

- Responded to CSA recommendations from UURMaPA members who were not selected; will retain suggestions in our files for subsequent years.
- Worked with Marni Harmony, Wendy Fish and Millie Rochester to complete certificates and arrange for video from Janne Eller-Isaacs (with help from her daughter Hannah).
- Announced both awards at the 7/10 Zoom event.
- Reached out to Marni and Wendy about serving for a third year on the CSA selection committee. They have both agreed to do so.
- Sent announcement article about both awards to Ann for the summer issue of Elderberries.
- Mailed certificates to Marni Harmony and Janne Eller-Isaacs.

Review financial accounts with the Treasurer

- I’ll be in touch with Richard

Organize peer support groups

- Drafted article for the summer Elderberries inviting members to indicate interest in joining a support group, either general or specialized focus. Included Fritz Hudson’s name and contact information.
- I received a Social Justice group leader’s name, which I’m still holding until others express interest in a group with that specific focus.
- I will continue to head up this effort until roles are formally clarified and I have thoroughly briefed Fritz.
- At the retreat I met with Fritz and passed along names I had received expressing interest in a Peer Support Group. I also sent him a list of group leaders and members (which may not be complete).

Communication with UUA re “intent to retire” forms and lists

- Have received 9 new intent to retire forms from Emily Cherry. Still need to determine distribution plan going forward given changes in VP role vis-à-vis Peer Support Groups, although Fritz appears to be receiving forms from Emily.

Administrative Tasks

- Prepared a draft revision of the VP Job Description for review and discussion by the Board (attached to the transmittal e-mail for my April report).
- Proofed the summer newsletter for Ann.
- Met virtually with Susan and Fritz to outline plan and schedule for September Board retreat.
- Participated in the in-person Board Retreat Sept. 5-8.
- Proofed the fall newsletter for Ann.
- ***Will review and post revised Board job descriptions that I have received before our January meeting.***
- ***Will review by-laws and propose revisions before our February meeting.***

New Member Welcome Event

- Forwarded the July 10 welcome event invitation with registration link to the entire membership in late June.
- With input from other Board members and Jon Claney, drafted and revised the schedule for the 7/10 virtual welcome event, invited and confirmed participants, sent them the registration link, and updated the schedule as Jon received videos.
- Participated in 7/10 virtual event (announcing award winners).

Conferences

- Offered to lead the closing worship for the Fall Conference. Consulted with Lynda Sutherland and Jon Claney about the format, outline and script for the service. Met with the Conference Planning Group to get their OK for the service content. Recruited Marni Harmony as a reader. Forwarded the script link to Jon.
- Led the closing worship, and participated in post-conference evaluation sessions.
- Stepped in to facilitate break-out groups during the fall conference.

Secretary – Gloria Perez

I sent the October minutes to Jaco for posting on the web site. I also informed him that I would not be attending the November meeting and, therefore, would not be sending him November minutes.

I read the reports for November and chimed in about the IDI.

Treasurer – Richard Speck

I am working with Jon Claney on a possible new membership system. I am working on the Spring Conference. And I am still trying to get proposals for the IDI. I will send a draft budget soon.

Conference Coordinator– Barbro Hansson

Fall 2023 Conference, October 23-25: “Blessings & Challenges: Faithfully Negotiating Change.” It was a successful conference by all accounts. We are all getting better at this new “normal” of producing virtual conferences. Continuity helps a lot. Jon Claney has been with us since the fall of 2021 and has produced 5 or the 7 virtual conferences since Covid imposed its lockdown in 2020. Having Jon’s guidance is invaluable, for the Planning Team as well as for presenters. To secure his services, we need to make sure he is fairly compensated.

We also benefitted from continuity of membership on the Planning Team. That, too, makes huge difference. Two developments that came out of this continuity are collaboration and creativity. Everyone who attended the Remembrance Service experienced the results.

The Fall 2023 Conference was the best attended virtual conference so far. We had a total of 188 individuals signed up. Ten of those were guests from the UUA and the UUMA. All 188 did not attend the conference. A few were provided pre-recorded messages and did not attend at all. Some registrants attended only select sessions. There were 164 paying registrants. Richard awarded 10 full scholarships at \$40.00 each. We had 2 UURMaPA guests who presented. Even though the Planning Team were informed that their registration fees were waived, all but one chose to pay the \$40.00.

In a separate document, I share some analytics from RegFox, the on-line registration service we use. In that document you will note that the total amount of registrations and scholarship donations came to \$8,616.00. The processing fee charged by RegFox was \$506.02.

The Income and Expense Report (separate document) shows how much was received in registration fees and scholarship donations respectively, as well as all the expenses that came along with producing the conference. The bottom line is a net of \$2,135.04, if my math is correct.

Shortly after the conclusion of the fall conference, all Board members should have received the evaluation responses document. In that, you could read both positive and negative comments, some of which cancel each other out. In any case, moving forward, the Planning Team will do its best to address constructive feedback and continue to fine-tune conference offerings.

I am deeply grateful to the members of the Planning Team and the wisdom, experience and spirit they all bring, and feel very privileged to continue in my dual role as Convener and Conference Coordinator on the Board.

Spring 2024 Conference, April 15-17: “Emergent Elderhood: Service is Our Prayer.”

I am pleased to report that all members from the Fall Conference Planning Team are staying on, except for one, who is a new grandfather. Continuity is a really good thing and makes my work as Convener and UURMaPA Board Conference Coordinator a real joy. The Planning Team members and roles are listed below. The list includes a few additional roles, and it is my hope that the Team will decide at the January meeting whether those roles should be added or not.

At the first Planning Team meeting earlier in December, the Planning Team chose a theme title, “Emergent Elderhood: Service is Our Prayer,” and decided to feature a theme speaker, rather than a theme panel this time around. Different Topics of Interest for breakout groups will also be back on the schedule, as well as in-person reports/presentations by Keith Kron and Richard Nugent. At the request of Susan V. Rak, the Team put together a list of Suggestions for Odyssey Presenters. That list has been forwarded to her.

The Spring 2024 Conference program schedule will likely also include 3 Check-In sessions for breakout groups, one each day, along with Opening and Closing worship, a Remembrance Service, two Odyssey presentations and, of course, time for UURMaPA Board to feature “late-breaking” news or whatnot. As usual, I’ll keep the Board posted.

Fall 2024 Conference, October 21-23, 2024. I’m thrilled to report that Sonya Sukalski has agreed to co-convene the Planning Team for the Fall 2024 Conference. Though the transition has already begun, it will not be effective until April 2024.

Spring and Fall 2025 Conferences. It’s time to begin looking at dates for our 2025 spring and fall conferences. Unless the Board instructs me otherwise, I would like to explore earlier dates for both. Maybe March and September.

Connections Coordinator Fritz Hudson – December 19, 2023

BOARD-DELEGATED ACTIVITY

New Member On-Boarding:

The November Board Meeting’s discussion of my draft “Policy & Procedure Statement” reached a consensus that the distribution of the Board-authorized gift to new members should remain the responsibility of the Vice-President, to be performed on an annual basis.

I expect that January will bring the opportunity to test other provisions in the draft statement. I request that we delay further consideration of the statement until our February meeting.

CONNECTIONS ACTIVITY

1. Area Connectors. We now have

* **7 Areas with Active Connectors** for 2023-24: *Colorado/Montana/Wyoming; Northeast; Ohio-Meadville; St.Lawrence; Tennessee,Vermont; Western-Canada.*

* **1 Area with an Identified Prospective Connector:** *Ballou/Channing*

* **7 Areas with Uncertain Connector Activity** for 2023-24: *Arizona/Nevada; Central-Massachusetts; Florida; Metro-New-York/New-Jersey; Mid-South; Overseas; Western-Carolinas.*

~ "Uncertain" Areas have Connectors identified on our Website, but they have not responded to 2 emailed requests for contact. I plan a third request in January. If no response is received by February 1, I propose to declare these positions "Vacant"

* **18 Areas** for which the Connector position is **Vacant**: *Central Midwest; Connecticut Valley; Eastern-Canada; Eastern-Carolinas; Heartland-North; Heartland-South; Joseph-Priestley-North, Joseph-Priestley-South, Mass-Bay-Central; New-Hampshire; New-Mexico; Northern-California/Hawaii; Oregon/Idaho; Prairie-Star/Mid-West-Canada; Southern-California; Southwest; Virginia; Washington/Alaska*

2. General-Interest Peer Support Groups

40 UURMaPAns were reported as involved in On-going Groups as of July 1, 2023.
30 UURMaPAns have been newly formed or added into groups since July 1, 2023.
1 UURMaPAN is awaiting connection with a group.

3. Special-Interest Peer Support Groups Open to New Members

A. On-going Groups gathered before July 1, 2023.

* *Caregivers*

* *Grief*

B. Published Invitations to form Groups

* Groups with Identified Convenors

~ *Goddess is Meaningful*

~ *Spiritual Companionship*

~ *Chronic Illness/Pain/Injury*: The Convenor reports that she has not yet received sufficient interest to form a group

* Groups with Convenor to be Determined

~ *LGBTQ+ Elderhood*

C. Proposed Invitations for Future Publication:

* Groups with Identified Convenors

~ *Single Ministers*

~ *Managing Depression*

* Groups with Convenor to be Determined

~ *Living with Financial Constraints*

4. Peer Support Group Invitation Plan: I propose to issue/publish:

* UURMaPA Announce invitation in January

* New UURMaPAN Personal Email Invitations monthly beginning in January

5. Experimental Activity: "Virtual Coffee Hour"

Conference Small Group Coordinator Sonya Sukalski

- * convened a "Virtual Coffee Hour" on December 7; 22 attended.
- * scheduled another "Virtual Coffee Hour" for February 15.

Connections Assistant – Joy Atkinson

I have sent no new death notices out to the membership this past month, having received none from the UUA since the last Board meeting and no information on partner deaths. I did receive, from a colleague, notice of the death of the Rev. Olivia Holmes on December 11, and am awaiting more information before sending out a notice. The memorial service for Olivia will be at 4 PM on June 29th at Peterborough UU Church, New Hampshire. Olivia will be missed!

Report of the At-Large Member for UUMA/UUA Relations Wayne Arnason

Looking back at the last month since we met in November, I must admit I haven't thought much or done much about UURMaPA concerns. Thanksgiving travel, a little bout with covid for Kathleen and covering for her in various ways, and personal interests apart from UURMaPA have been filling my time.

I recall I volunteered to prepare an application for a UURMaPA GA video panel that was intended to draw in retirees from the other religious professionals beyond ordained clergy – administrators, religious educators, music directors. My intentions were good but I am admitting to myself that my energy is not there for this right now. I enjoyed wrangling retired ministers for participation in panels like this for theme presentations at our conferences in recent years, but as I look to the administrative tasks associated with pulling off a video panel like this for GA, I recognize that my heart is not in it. So I'm backing off from my initial interest, and based on my memory of our conversation about this last month, I don't think anyone else was interested in taking leadership on any program for GA from UURMaPA.

I have spoken with Barbro about my role with the spring conference, which will only consist of contacting our two UUA staff members who are routine presenters, Keith Kron and Richard Nugent, about their roles for this conference, and recruitment and management of the chaplains.

Susan is the only Board member who wrote to me this past month in response to my request to volunteer to call any individual colleagues or partners of color approaching retirement (or in retirement who are not participating in UURMaPA) to interview with some suggested questions drawing out how they see their future collegial participation. I'll ask to spend a little reminder time on the agenda about this, but as I told you before, we can confirm in January whether we have capacity for follow-through on this intention.

I mentioned in October that I had a referral from Ned for a Good Offices consultation, which initially looked like it would be one-and-done. It has now continued

to unfold into a lengthy and ongoing consultation about a retired former minister and struggles with reaching a satisfactory covenant for participation in the former congregation. I've thought a lot about this whole dynamic, and think it might represent an area of conversation and engagement for the Retired Ministers UUMA chapter.

The Retied Ministers Chapter met this very day, December 19, and several of our Board members attended. The breakout group conversations were well received, as was the suggestion that the chapter meet monthly for the rest of the year. Other smaller group activities that were suggested could be focused on UUMA Guidelines Review (where I could bring my concerns about settled/former/retired minister dynamics), a *lectio divina* group, and a resource group around financial issues. Many people indicated they already have a support group either within or beyond UURMaPA. I suggested that as the chapter stabilizes it should be the appropriate home for Good Offices persons for retirees.

Of the 28 or so participants, many were familiar faces from UURMaPA conferences. In one of my small groups, there was enthusiasm expressed for having a covenanted group of retired ministers to share with, and there was wide agreement, with none of it framed by hostility towards what UURMaPA does. We will continue to discern what belongs distinctly to UURMaPA and what belongs to the chapter. Support groups seem to be possible within both, but the kind of generic support group that Fritz's portfolio oversees is not on the chapter's agenda right now.

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Dec. Treasurer's Report and 2024 Budget follow below...

Treasurer's Report - Dec. 2023														
	2023 Budget	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	2023 Total	Budget v. Actual
INCOME														
Member Donations	\$5,000.00	\$200.00	\$0.00	\$0.00	\$5,270.00	\$2,080.00	\$0.00	\$360.00	\$178.00	\$350.00	\$250.00	\$230.00	\$8,918.00	178.36%
Member Donations Paypal	\$8,300.00	\$939.12	\$20.00	\$20.00	\$1,551.71	\$1,722.63	\$206.89	\$20.00	\$316.58	\$20.00	\$18.45	\$182.07	\$5,017.45	60.45%
Memorial Gifts	\$1,700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Conference Fee Income Checks	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,380.00	\$1,510.00	503.33%
Conference Fee Income Credit Cards	\$15,000.00	\$0.00	\$1,330.70	\$1,315.64	\$1,588.84	\$729.29	\$0.00	\$862.50	\$879.96	\$3,207.00	\$3,175.39	\$0.00	\$13,089.32	87.26%
GA Luncheon Income	\$0.00	\$0.00	\$0.00	\$0.00	\$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	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	100.00%
Scholarship Income	\$3,700.00	\$0.00	\$555.00	\$425.00	\$625.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,605.00	43.38%
Other Income	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$505.00	252.50%
Total Regular Income	\$35,200.00	\$1,139.12	\$2,905.70	\$1,760.64	\$9,035.55	\$4,666.92	\$206.89	\$1,242.50	\$1,874.54	\$3,577.00	\$3,443.84	\$1,792.07	\$31,644.77	89.90%
EXPENSE														
On-Site Board Meetings														
Transportation	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$417.20	\$774.90	\$0.00	\$1,192.10	29.80%
Room and Board	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,453.00	\$0.00	\$0.00	\$0.00	\$4,453.00	222.65%
Hospitality	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$373.97	\$0.00	\$0.00	\$373.97	186.99%
Total Board Meetings	\$6,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,453.00	\$791.17	\$774.90	\$0.00	\$6,019.07	97.08%
Conferences														
Attendee Fee Refunds	\$0.00	\$0.00	\$0.00	\$0.00	\$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	\$0.00	\$762.34	\$762.34	0.00%
Speakers	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Music	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	250.00%
Technology Support	\$10,000.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	100.00%
Hospitality	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Scholarships	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Misc.	\$100.00	\$0.00	\$0.00	\$0.00	\$125.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.00	125.00%
Total Conferences	\$11,800.00	\$0.00	\$5,000.00	\$0.00	\$125.00	\$500.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$762.34	\$11,387.34	96.50%
General Assembly														
Luncheon Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Transportation-President	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$873.78	\$0.00	\$445.34	\$0.00	\$0.00	\$0.00	\$0.00	\$1,319.12	329.78%
Transportation-Vice President	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Room and Board	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Technology Support	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
GA Fees & Misc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
New Member Welcoming Gifts	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$719.72	\$0.00	\$0.00	\$0.00	\$719.72	71.97%
Total General Assembly	\$3,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$873.78	\$0.00	\$445.34	\$719.72	\$0.00	\$0.00	\$0.00	\$2,038.84	53.65%
Communications														
Elderberries Publication	\$5,000.00	\$0.00	\$0.00	\$1,248.07	\$0.00	\$0.00	\$1,263.15	\$0.00	\$0.00	\$1,747.66	\$0.00	\$0.00	\$4,258.88	85.18%
Fundraising Appeal	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,318.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,318.46	87.90%
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	\$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	\$971.64	\$0.00	\$0.00	\$971.64	485.82%
Zoom	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Database Management	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Total Communications	\$7,200.00	\$0.00	\$0.00	\$1,248.07	\$1,318.46	\$0.00	\$1,263.15	\$0.00	\$0.00	\$2,719.30	\$0.00	\$0.00	\$6,548.98	90.96%
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	\$0.00	\$0.00	\$0.00	0.00%
Saging & Unsung & Navias Awards	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Rainbow Project	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$178.00	\$1,178.00	117.80%
Postage	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$126.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$126.00	126.00%
Connections Network	\$100.00	\$0.00	\$0.00	\$0.00	\$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	\$3,000.00	\$0.00	\$700.00	\$900.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,600.00	86.67%
Donations to the Endowment	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$0.00	\$10,000.00	20000.00%
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	\$0.00	\$0.00	0.00%
Credit Card Processing Fees	\$700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2.78	\$0.00	\$0.00	\$0.00	\$2.78	0.40%
Bank Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Board Misc.	\$150.00	\$0.00	\$0.00	\$0.00	\$192.00	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$442.00	294.67%
Total Other Expenses	\$6,200.00	\$0.00	\$1,700.00	\$900.00	\$192.00	\$250.00	\$1,126.00	\$0.00	\$2.78	\$0.00	\$10,000.00	\$178.00	\$14,348.78	231.43%
Total Expense	\$35,200.00	\$0.00	\$6,700.00	\$2,148.07	\$1,635.46	\$1,623.78	\$7,389.15	\$445.34	\$5,175.50	\$3,510.47	\$10,774.90	\$940.34	\$40,343.01	114.61%
Profit/Loss	\$0.00	\$1,139.12	-\$3,794.30	-\$387.43	\$7,400.09	\$3,043.14	-\$7,182.26	\$797.16	-\$3,300.96	\$66.53	-\$7,331.06	\$851.73	-\$8,698.24	
Ending Account Balance														
Endowment		79,758.20	\$84,540.04	\$82,102.12	\$84,512.62	\$84,512.62	\$83,242.74	\$86,327.75	\$86,066.88	\$86,066.88	\$83,041.41	\$90,700.62		
Money Market		\$19,232.85	\$19,233.59	\$19,234.41	\$19,235.20	\$19,236.02	\$19,236.81	\$19,237.63	\$19,238.45	\$19,239.24	\$19,240.06	\$19,240.85		
Checking		\$34,887.37	\$31,073.07	\$30,665.64	\$38,065.73	\$41,048.87	\$33,866.61	\$34,643.77	\$31,322.81	\$31,369.34	\$24,019.83	\$24,871.56		
Total		\$133,878.42	\$134,846.70	\$132,002.17	\$141,813.55	\$144,797.51	\$136,346.16	\$140,209.15	\$136,628.14	\$136,675.46	\$126,301.30	\$134,813.03		

UURMaPA Proposed Budget 2024	2022 Total	2023 Budget	2023 Total	2024 Budget	Comments
INCOME			(as of 12/1/23)		
Member Donations	\$2,275.00	\$5,000.00	\$8,918.00	\$9,000.00	Annual Appeal
Member Donations Paypal	\$3,161.22	\$8,300.00	\$5,017.45	\$5,000.00	Annual Appeal
Memorial Gifts	\$1,037.01	\$1,700.00	\$0.00	\$1,700.00	
Conference Fee Income Checks	\$120.00	\$300.00	\$1,510.00	\$300.00	
Conference Fee Income Credit Cards	\$12,748.48	\$15,000.00	\$13,089.32	\$15,000.00	Increased fees
GA Luncheon Income	\$1,258.15	\$0.00	\$0.00	\$0.00	No Luncheon
UUMA Subsidy	\$0.00	\$1,000.00	\$1,000.00	\$1,000.00	
Scholarship Income	\$3,505.00	\$3,700.00	\$1,605.00	\$2,000.00	
Other Income	\$0.00	\$200.00	\$505.00	\$500.00	
Total Regular Income	\$24,104.86	\$35,200.00	\$31,644.77	\$34,500.00	
EXPENSE					
On-Site Board Meetings					
Transportation	\$0.00	\$4,000.00	\$1,192.10	\$1,250.00	In person
Room and Board	\$0.00	\$2,000.00	\$4,453.00	\$4,500.00	In person
Hospitality	\$0.00	\$200.00	\$373.97	\$400.00	In person
Total Board Meetings	\$0.00	\$6,200.00	\$6,019.07	\$6,150.00	
Conferences					
Attendee Fee Refunds	\$0.00	\$0.00	\$0.00	\$0.00	
Room and Board	\$1,380.00	\$0.00	\$762.34	\$0.00	
Speakers	\$500.00	\$1,000.00	\$0.00	\$500.00	Only one speaker
Music	\$0.00	\$200.00	\$500.00	\$200.00	
Technology Support	\$4,500.00	\$10,000.00	\$10,000.00	\$12,000.00	Increased payments
Hospitality	\$0.00	\$0.00	\$0.00	\$0.00	
Scholarships	\$0.00	\$500.00	\$0.00	\$400.00	
Misc.	\$703.68	\$100.00	\$125.00	\$100.00	
Total Conferences	\$7,083.68	\$11,800.00	\$11,387.34	\$13,200.00	
General Assembly					
Luncheon Cost	\$2,832.80	\$0.00	\$0.00	\$0.00	
Transportation-President	\$0.00	\$400.00	\$1,319.12	\$0.00	No inperson GA
Transportation-Vice President	\$0.00	\$400.00	\$0.00	\$0.00	No inperson GA
Room and Board	\$0.00	\$1,500.00	\$0.00	\$0.00	No inperson GA
Technology Support	\$0.00	\$500.00	\$0.00	\$0.00	
GA Fees & Misc	\$0.00	\$0.00	\$0.00	\$0.00	No inperson GA
New Member Welcoming Gifts	\$0.00	\$1,000.00	\$719.72	\$800.00	
Total General Assembly	\$2,832.80	\$3,800.00	\$2,038.84	\$800.00	
Communications					
Elderberries Publication	\$4,948.43	\$5,000.00	\$4,258.88	\$5,000.00	
Fundraising Appeal	\$0.00	\$1,500.00	\$1,318.46	\$1,500.00	
Peer Support Groups (video calls)	\$0.00	\$200.00	\$0.00	\$100.00	
Website	\$176.99	\$200.00	\$971.64	\$1,000.00	For transition to new site

Zoom	\$0.00	\$200.00	\$0.00	\$200.00	
Database Management	\$0.00	\$100.00	\$0.00	\$1,000.00	For transition to new site
Total Communications	\$0.00	\$7,200.00	\$6,548.98	\$8,800.00	
Other Expenses					
Retirement Planning Seminar Expense	\$0.00	\$0.00	\$0.00	\$0.00	
Saging & Unsung & Navius Awards	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	
Rainbow Project	\$0.00	\$1,000.00	\$1,178.00	\$1,000.00	Still not finished
Postage	\$46.94	\$100.00	\$126.00	\$150.00	
Connections Network	\$0.00	\$100.00	\$0.00	\$0.00	
Memorial Gifts - UUMA and Others	\$1,450.00	\$3,000.00	\$2,600.00	\$3,000.00	
Donations to the Endowment	\$0.00	\$50.00	\$10,000.00	\$0.00	No transfer this year
President's Expense	\$0.00	\$100.00	\$0.00	\$100.00	
Credit Card Processing Fees	\$687.31	\$700.00	\$2.78	\$100.00	
Bank Expenses	\$59.10	\$0.00	\$0.00	\$0.00	
Board Misc.	\$167.90	\$150.00	\$442.00	\$200.00	
Total Other Expenses	\$3,411.25	\$6,200.00	\$14,348.78	\$5,550.00	
Total Expense	\$18,453.15	\$35,200.00	\$39,402.67	\$34,500.00	
Profit/Loss	\$5,651.71	\$0.00	-\$9,549.97	\$0.00	
	2022 Total	2023 Budget	2023 Total	2024 Budget	Comments