

UURMaPA Board Zoom Meeting — December 12, 2024

Board decisions are in bold-face type; action items are in red. Reports appended to minutes.

Present: Wayne Arnason, George Buchanan, Barbro Hansson, Fritz Hudson, Paul Johnson, Anne Marsh, Susan Rak, Ned Wight

Absent: Joy Atkinson (on jury duty)

Susan called the meeting to order at 2:05pm Eastern - 1:05pm Central - 12:05pm Mountain - 11:05am Pacific. Fritz offered an opening reading by John Milton, "When I Consider How My Life Is Spent."

Susan reviewed the agenda. A check-in followed.
Consent Agenda was accepted.

1) Conferences:

Barbro reported that planning for the next conference is going well. Jeff Briere, Sonya Sukalski, and Barbro are heading up the Planning Team, and are meeting weekly. As noted in Barbro's written report, our theme speaker will be Karen Haring and Melanie DeMore will be our musician. Instead of a "topics of interest" session, Wayne Walder will lead a program wherein two ministers and one partner share deeply about an event in their ministries or partnership.

Conference registration opens on February 4, 2025. Susan is talking with possible Odysseans, and is hopeful that two will accept her invitations.

Barbro asked if any Board members would like to participate in the opening or closing worship services at the conference. No one volunteered, but **she will email us for decisions.**

Barbro sent out a written proposal from the Conferences Financial Aid Task Force. A scholarship fund will be set up by transferring \$20,000 from the UURMaPA endowment fund. Donations will be added as they come in. To begin with, we will offer a maximum of \$100 to each person who requests assistance - \$45 for online conference registration, and additional \$55 to help defray expenses of attending a pod. This amount may be changed in the future as we see how the scholarship program works out. Paul will give scholarship aid to anyone who requests it, with the \$55 pod assistance coming as reimbursement. .

The Board voted to accept the proposal from the Financial Aid Task Force.

Barbro also requested \$1,000 be put in the 2025 budget for Conference Coordinator expenses. These include gifts for the Planning Team and Odysseans, and Zoom fees.

2) Bylaw Revisions:

George has reviewed our bylaws section on elections and suggests we let it stand for now. We may decide to take another look in future.

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3) Rainbow History Project Book:

Both Barbro and Susan had been contacted about the status of the Rainbow History project book. It was approved for publication by Skinner House, but seems to have stalled. Skinner House apologized for the delay, and they hope to be able to publish the book in 2025, though no promises have been made. Ned suggested we plan a launch party when the book is published. All agreed this was a great idea, and that we can start planning soon, so that we will be ready when the book is. **Susan will put this on the agenda each month.**

4) Mentorship Proposal:

Fritz reported that the Mentorship Task Force (Fritz, Ned, and Joy) met yesterday. They have divided up the names of the 27 or so ministers who retired in the past year, and will contact each of them. The TF has also compiled a list of possible mentors, but will first ask each interested new retiree whom they might like to have as a mentor. They hope to match up mentors/mentees by end of January, do training for mentors by end of February, and have the first meetings of mentors/mentees in March. It is suggested that the pairs meet for 6-12 months. As an aside, Fritz noted that out of 75 new retirees invited to attend the fall conference for free, only 7-8 accepted, and that many new retirees don't seem immediately interested in peer support groups. It may be that the mentorship program will appeal more to folks in their 2nd or 3rd year of retirement.

5) Database conversion:

Fritz received word from Jon Clane that information from last summer has been loaded into the new database system. Jon will load new information and changes if they are sent to him. He will also meet with Fritz and Membership Coordinator Ann Marie Alderman next week and give them training on how to update and maintain the database themselves.

We took a bio/stretch break for 5 minutes.

6) Board Email:

Board members have had problems receiving messages using the Board group email. **Susan will check with Jaco to resolve these issues.**

7) Budget 2025:

Susan was able to screen-share Paul's most recent Treasurer's report, showing the 2024 budgeted amounts and the actual income and expenditures through October (November figures haven't been entered yet.) Paul reviewed the budget line by line, and Board members commented.

Paul noted that contributions are very much under budget this year, although that could change once Susan's fundraising letter goes out. Most Board retreat expenses were also over budget. Barbro clarified that for conferences, theme speakers and musicians each receive a \$500 honorarium. Tech support is on budget, but Jon Clane hasn't cashed his payment check for the fall conference. **Barbro will contact Jon.** Wayne authorized Paul to pay Jon for his tech support of the recent UUA webinar; **Paul will sent Jon a check.**

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One issue that arose is whether it is still worthwhile to budget for a UURMaPA representative to attend General Assembly in order to participate in the Service of Living Trad and the survivors' luncheon. At some point, might the UUMA Retired Ministers chapter want to take this over? **Board needs to decide whether the GA expense is worthwhile.**

At George's suggestion, it was agreed to keep *Elderberries* expenses at \$5,000 for now, but to make a stronger push to encourage folks to get it electronically. We also agreed to continue our BLUU donation, but not to budget for a Finding Your Way Home scholarship, as this funding is covered by the UUA.

Paul noted that our assets (endowment, money market, checking account) are in good shape.

Barbro will send Paul the budget she has proposed for 2025 conferences.

Paul will reach out to Richard Speck and work with him to put together a projected budget for 2025, which will be presented at the February meeting (or maybe January, if it's ready sooner.)

Paul will transfer \$20,000 from the endowment to the scholarship fund, and will let Susan know if he needs her signature and/or other information.

Next meeting Thurs., January 9: 2pm Eastern - 1pm Central - 12pm Mountain - 11am Pacific

REPORTS FOR DECEMBER 12, 2024 MEETING

1) Vice-President's Report 12/12/24 - Ned Wight

Here are items on my workplan for 2024-2025 (based on VP job description). Most recent activity is indicated in ***bold italic type***.

Arrangements for UURMaPA gift distribution

- The InSpirit Bookstore confirmed sending out 42 copies of [The Seasoned Soul: Reflections on Growing Older](#) by Eliza Blanchard to our new members in the U.S. and Canada. We were billed \$720.52. We received one thank you e-mail.

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

Propose workshops during Ministry Days or GA

Creative Sageing Award selection group and Unsung UURMaPAn Award

- This month I will convene a meeting with Marni Harmony and Wendy Fish to begin this year's selection process for the award to be announced at our Fall Conference.
- I specified 9/21 as the deadline for submitting suggestions to me regarding this year's CSA recipient. To date, I have received no suggestions. Marni and Wendy and I will be meeting within the next week to make this year's selection. (Suggestions still welcome.)

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- Selection group made its choice and I'm in the process of confirming information with the recipient. I will prepare a certificate for the award-winner and make the presentation on Wednesday of the conference.
- Prepared citation and script for CSA presentation to Carole Martignacco at the Fall Conference. Made the presentation online and welcomed Carole's insightful remarks. Sent Carole a copy of the citation, and requested that the treasurer send her a check for \$500.

Organize peer support groups

- This function has been graciously taken on by Fritz Hudson.

Communication with UUA re "intent to retire" forms and lists

- Gratitude to Fritz Hudson, who is now managing this relationship.

Administrative Tasks

- ***Awaiting receipt of final job descriptions for reformatting and forwarding to the Board for final approval and posting on the website.***

New Member Welcome Event

- Finalized the "run of show" for the July 15 virtual welcome event, confirmed participation of all presenters and sent them confirming e-mail reminders.
- Secured use of the SOLT slide show for this event and forwarded it to Richard Speck with a listing of all those on the new retiree and partner list that Fritz Hudson sent me that were not included in the SOLT this year.
- Sent an invitation e-mail to 42 retirees and 16 partners with the link to register for the event.
- Welcome event took place on Zoom on July 15 with over 50 members participating, including 18 new members.

Conferences

- Met via Zoom with worship planning team to discuss opening worship.
- Met via Zoom with Anne Marsh to outline the opening worship service before the 9/27 outline submission deadline.
- Conferred with Anne, Lynda, Jon and Sonya about the opening worship; selected music and drafted script with Anne; selected slides; sent slides to Lynda for integration with music; recorded my portions of the script and forwarded them to Jon on 10/7.
- Participated in the Fall Conference as a small group facilitator (and opening worship leader, pre-recorded).
- ***Participated in online post-conference assessment with facilitators of the small group experience.***

Financial/Scholarship Review Task Force

- Met three times with this Task Force and volunteered to serve as notetaker. Prepared and sent out notes to participants.
- ***Met online once again with the TF.***

Mentoring Task Force

- Participated in first meeting of the mentoring task force on 9/24.
- Drafted mentor orientation plan for discussion at the 11/8 TF meeting.

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- Participated in a follow-up meeting of the TF. Edited a document summarizing the plan for full Board review at the November 14 meeting.
Reviewed revised roll-out plan prepared by Fritz and discussed it with members of the TF. Plans call for rolling out the pilot in early January 2025.

UURMaPA: Report to Board of Directors

- 2) Connections Coordinator Fritz Hudson – **December 12, 2024**
(New Information in Red)

DELEGATED-PROJECT ACTIVITIES

1. Data-Base Conversion: **Nov. 20 Jon Claney (Project Manager) met with Membership Coordinator, Webmaster, Conference Planning Co-Chair, Connections Coordinator.** The group endorsed moving forward with transferring the Database to the Planning Center / Church Center system. The Membership Coordinator & Project Manager will determine when and how to invite members to access and use the system. There is no agreed schedule for the transition. The Connections Coordinator will continue to provide monthly progress reports to the Board.
2. Mentoring Program: **As projected in the Board's Nov.14-approved plan, the Connections Coordinator has prepared a list of prospective mentees (2024 retirees: 27) and recommended mentors (Pre-2024 retirees who registered for at least one of our last 3 Conferences: 216).** In early January the Task Group will invited prospective mentees to express interest and suggest attractive Mentor candidates. The Task Group hopes to finalize Mentee/Mentor matches by the end of January. The Mentor Orientation/Training Session is projected for late February.

CORE ACTIVITIES

1. Area Connectors.

Areas with Connectors: 16

Maine.....Lucy Ijams	Southwest.....Jonalu Johnstone
Vermont.....Brendan Hadash	Heartland North & South...Fred Wooden
Metro NY/NJ.....Ann Marie Alderman	Central Midwest.....Marcia Marino
St.Lawrence.....Dick Gilbert	Prairie Star South..... Diane Miller, Sarah Voss
Ohio-Meadville.....Janet Newman	New Mexico.....Christine Robinson,
Western Carolinas...Lisa Schwartz	Gary Kowalski, Claudia Elferdink
J.Priestley North.....Paula Maiorano	Eastern Canada.....Wayne Walder
Florida.....Bob Murphy,	Western Canada.....Linda Horton, Carl Ulrich
Eleanor/Peter Richardson	

Areas with Identified Connector Prospects: 5

New Hampshire	Ballou Channing	J.Priestley South	Virginia
MassBay North			

Areas with Uncertain Connector Prospects/Activity: 13

Central Mass	Mid-South/Tennessee	Rocky Mountains	Oregon/Idaho
Connecticut Valley	Eastern Carolinas	Arizona/Nevada	Northern California Inland
MassBay South	Prairie Star North	Washington/Alaska	Northern California Coast
			Southern California

In January, the Connections Coordinator will convene a Zoom "Swap Shop" for Connectors to share triumphs/challenges and provide mutual stimulation/support. Ministers living in Areas lacking active Connectors will be invited to attend.

Connection Census: As of December 1, 2024

	Members	Email-Connected
Retired Ministers	766	715
Household Partners	412	173
Surviving Partners	207	105
TOTALS	1,385	993

2. Connections Zoom Groups

Total groups reported	12
Total participants reported	71
UURMaPAns with referral to prospective groups ..	3
UURMaPAns awaiting referral to a group:	0

3. Focused Zoom Groups Open to New Members

Ongoing Groups continuing: *Caregivers* - Convenors: Sylvia Howe, Makanah Morris
Grief Support - Convenor: Duane Fickeisen

New Groups currently in formation

* <i>Single Retired Ministers</i> - Convenor: Beth Miller	Invitations emailed	271
	Interested Respondents reported to date	17
	Initial Meeting not yet set	
* <i>Partners</i> - Convenor: Janet Tillman	Invitations emailed	275
	Interested Respondents reported to date	5
	Initial Meeting to be held	12/18/24
* <i>Book Discussion, Life After Doom by Brian McLaren</i> Convenor: Shelley Page	UURMaPA-Announce Notices sent	1018
	Expressions of Interest	4
	Initial Meeting to be held	1/14/25

4. Program Invitations

Program Welcomes sent to date: (July 1 - December 10): Ministers 15; Partners 10

New UURMaPAns invited to register to attend first conference w/o fee

July-2022>Oct.2024 New UURMaPAns invited Fall 2024:	Ministers: 70	Partners: 35
New UURMaPAns Registered for Fall 2024 Conference:	Ministers: 8	Partners: 2

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3) Conference Coordinator's Report 12/12/24 - Barbro Hansson

Spring 2025 Conference - April 21-23, 2025: Theme TBA: about turning points & thresholds

The Planning Team met on December 6 and will not meet again until January 3. Between meetings, Sonya, Jeff, and I meet weekly to coordinate and prepare. So far, it is going exceptionally well. Working together, we have successfully filled all roles on the Planning Team. Lynda Sutherland stepped down as Worship Coordinator, and Joan van Becelaere is currently considering that role. Susan Smith agreed to join the team as the Utility Infielder. Anita Farber-Robertson will be working with Jan Carlsson-Bull on Connection Rooms, and Wayne Walder is joining the team in a new role. The Planning Team list is included at the end of this report.

It turned out that Neal Foard, who we extended an invitation to was way out of our league. We are excited to instead feature one of our own, the Reverend Karen Haring, as theme

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presenter. She will propose to us a theme title for the conference and her presentation. Karen serves in an entrepreneurial, community ministry that includes online and in-person guided writing sessions, retreats, and programs about living well amid change in community, congregational, and workplace settings. Her book, *Trusting Change: Finding Our Way through Personal and Global Transformation*, is available at a 20% discount to UURMaPAns at the UUA Bookstore. If you want to purchase her book, the code is HERING.

The Spring Conference offers an In Concert session, and we are thrilled that Melanie DeMore accepted our invitation to sing, play, and share stories with us in April. Melanie DeMore is a three-time Grammy-nominated singer/composer, choral conductor, music director, and vocal activist who believes in the power of voices raised together.

If Joan van Becelaere joins the team as Worship Coordinator, she may recruit a small team of colleagues in the Columbus, Ohio, area to work on the Remembrance Service.

Instead of offering a session with 10+ different selections of different topics, we've decided to experiment a bit. Wayne Walder offered an idea that focuses on sharing stories. He calls it Ministry, a play on the word minister. Wayne will recruit three individuals (2 ministers and one partner) to work with him for several months on selecting, writing, and telling a story from their ministries or, in the case of the partner, a partner's story relative to UURMaPAns. If it goes well, with positive responses following the conference, this idea may develop into a theme for the Fall 2025 Conference.

As usual, the conference will feature two odysseys. One minister and one partner. Thank you, Susan, for extending invitations and waiting for responses.

At some point during the three-day conference, there will be a 30-minute time slot for the Board to share what's in the loop. The UURMaPA Board of Directors has the right of first refusal regarding the opening and closing worship. Now is the time to step up and say "Yes" or decline.

Fall 2025 Conference - October 20-22, 2025 — Nothing new to report.

Conferences Financial Aid Task Force

The Task Force met early December and agreed on a proposal for the UURMaPA Board of Directors to consider. That proposal is appended to this report.

Spring 2025 Conference Planning Team

Co-Conveners: Sonya Sukalski & Jeff Briere

Scribe: David McFarlane

Utility Infielder: Susan Smith

Publicity: Jeff Briere

Theme Presenter Liaison: Sonya, Jeff, and/or Barbro

Music Presenter Liaison: Sonya, Jeff, and/or Barbro

Worship Coordinator: Joan van Becelaere

Odyssey Coordinator: Duane Fickeisen

Connection Room Coordinators: Jan Carlsson-Bull & Anita Farber-Robertson

Ministry Coordinator: Wayne Walder

Slide Show Creator: Jeff Briere

Evaluation Form Editor: Jeff Briere

On-Site Pod Coordinator: Richard Speck

Registrars: Richard Speck and Jon Claney

Tech Assistant: Richard Speck

Zoom Master & Tech Professional: Jon Claney

UURMaPA Board Liaison: Barbro Hansson

Conference Chaplain Coordinator: Wayne Arnason

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UURMAPA Scholarship Task Force Proposal 12/3/24

1. The UURMaPA Board is to create a separate Scholarship Fund within the UUA Common Endowment Fund (CEF) by transferring \$20,000 from the UURMaPA Endowment Fund in fiscal 2025. The Treasurer is authorized to remove 5% of the corpus of this fund annually to provide scholarship aid to members to attend conferences either virtually or in person. The withdrawal will occur each year and be added to the annual budget line item for scholarship assistance. The Treasurer will determine that amount in December of each year to put that amount into the annual budget for the following year.
2. UURMaPA Conferences will continue to solicit donations to the Scholarship Fund as a part of the registration process for each conference. These funds can be used to offset scholarship requests for each conference. All remaining funds donated will be transferred to the Scholarship Fund twice a year following the final accounting of each conference.
3. Should requested scholarships exceed available funds, the Board, at its discretion, may redirect donations in any given year to supplement scholarship aid from the Scholarship Fund.
4. For fiscal 2025, the first year of the Scholarship Fund, the amount of scholarship aid to be withdrawn is set at \$1,000 (5% x \$20,000) to be evenly split between the two conferences in the spring and fall.
5. Subsequent amounts for scholarship aid will increase as the corpus of the Scholarship Fund grows with the addition of received donations for each conference.
6. Requested scholarship aid for any conference will be limited to \$100 maximum for any person who requests it in fiscal year 2025. The aid can be used to cover registration and/or room and board for any conference.
7. The Treasurer will determine the validity of the request before granting it. Should the request be adjusted by the Treasurer, the Treasurer will communicate the reasoning behind that adjustment to the individual.
8. The board may increase the maximum limit for any scholarship aid in a given year depending upon the recommendation of the Conference Planning Team in consultation with the Treasurer.

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4) *Elderberries* Editor's Report 12/12/24 - George Buchanan

I have been delayed in preparing the November *Elderberries* issue. I hope the electronic edition will be available by the end of next week. I accept responsibility for this delay, due to personal and family challenges. I appreciate the timely work of all those who provided copy for this issue.

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5) UUA /UUMA Liaison Report 12/10 2024 - Wayne Arnason

Within the last month, we've had our Financial Issues online event with the UUA staff, which I moderated. I reported on this verbally last time, and we acknowledged some interest in

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doing this again in the spring, but haven't gone farther than that. I'd suggest some agenda time at the December meeting following up on this conversation, since I'm told there is no plan for any UUA staff presentations at the Spring 2025 Conference.

One of my Good Offices cases that carried over from last spring has seemed to resolve itself, with satisfactory communication between a retired former minister and the most recent contract minister about the former's future involvement in the congregation. Two other cases remain open. One of them is a long and complex (and very exciting and exemplary) repair and restoration process with a retired minister who sought to apologize for misconduct within a congregation he served. The second is a renegotiation of a long-standing covenant with a former minister after a minor misconduct violation and moving away from the city where the congregation is located. I was asked by the Nominating Committee for the new Retired Ministers Chapter to be one of three Good offices people for the new Chapter. We should probably formally buy into this new system, note it in our minutes, and discuss whether any Good Offices role is built into my position on the Board when my successor takes over in July.

In Chapter news, I continue to be part of the team working on cultural and Guidelines changes to improve the relationships among retired and former ministers and their diverse kinds of "settled" colleagues in congregations where they wish to participate. We have three conversations under our belt with UUA and UUMA staff either completed or scheduled before Christmas and will decide on next steps in formal Guidelines amendments in the new year.

I was asked to be an endorser of the invitation letter for the DRUUUMM worship event this spring, and did so with an institutional identification with UURMaPA. I thought this was justified since we budget to support DRUUUMM through this event each year at this point.

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6) Transitions Coordinator's Report 12/12/24 - Joy Atkinson

I have sent death notices regarding the following beloved colleagues since the last Board meeting: the Revs. Ronald Knapp, Robert Lewis and Margaret Keip. I received no notices of partners' deaths.

I met with Fritz and Ned to discuss a revision of our plan for a new mentoring program for recently added UURMaPans.

Treasurer's Report Follows

Income and Expenses 2024- DECEMBER															
	2024 Budget	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	2024 Total	Budget vs. Actual
INCOME															
Member Donations	\$9,000.00	\$150.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00		\$1,100.00		\$805.00	\$2,155.00	23.94%
Member Donations Paypal	\$5,000.00	\$0.00	\$593.81	\$115.07	\$18.45	\$18.45	\$0.00	\$259.75	\$18.45	\$357.35	\$908.42			\$2,289.75	45.80%
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%
Conference Fee Income Checks	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$55.00		\$2,030.00	\$2,085.00	695.00%
Conference Fee Income Credit Cards	\$15,000.00	\$0.00	\$4,134.66	\$3,312.85	\$1,810.09	\$0.00	\$0.00	\$0.00	\$2,073.02	\$3,499.92	\$3,009.69			\$17,840.23	118.93%
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%
UUMA Subsidy	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00					\$1,000.00	100.00%
Scholarship Income	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Other Income	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	0.00%
Total Regular Income	\$34,500.00	\$150.00	\$4,728.47	\$3,427.92	\$2,828.54	\$118.45	\$0.00	\$259.75	\$2,091.47	\$3,857.27	\$5,073.11		\$2,835.00	\$25,369.98	73.54%
EXPENSE															
On-Site Board Meetings															
Transportation	\$1,250.00	\$0.00	\$0.00	\$823.77	\$0.00	\$0.00	\$0.00		\$1,162.76	\$1,413.80	\$516.78			\$3,917.11	313.37%
Room and Board	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,020.60		\$4,082.40					\$5,103.00	113.40%
Hospitality	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$177.78				\$177.78	44.45%
Total Board Meetings	\$6,150.00	\$0.00	\$0.00	\$823.77	\$0.00	\$0.00	\$1,020.60			\$1,591.58	\$516.78			\$9,197.89	149.56%
Conferences															
Attendee Fee Refunds	\$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					\$2,240.00		\$2,240.00	0.00%
Speakers	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00					\$1,000.00		\$1,500.00	300.00%
Music	\$200.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00							\$500.00	250.00%
Technology Support	\$12,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,000.00							\$6,000.00	50.00%
Hospitality	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Scholarships	\$400.00	\$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	\$0.00	\$325.00	\$84.62			\$29.00	\$125.59	\$207.32	\$19.99	\$791.52	791.52%
Total Conferences	\$13,200.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$325.00	\$6,084.62			\$29.00	\$125.59	\$3,467.31	\$19.99	\$11,051.51	83.72%
General Assembly															
Luncheon Cost	\$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	
Transportation-Vice President	\$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	
Technology Support	\$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%
New Member Welcoming Gifts	\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$720.52					\$720.52	96.07%
Total General Assembly	\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$720.52					\$720.52	96.07%
Communications															
Elderberries Publication	\$5,000.00	\$0.00	\$0.00	\$1,894.52	\$0.00	\$0.00	\$0.00	\$1,417.90			\$1,488.89			\$4,801.31	96.03%
Fundraising Appeal	\$1,400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Peer Support Groups (video calls)	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Website	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$47.80		\$47.80	4.78%
Zoom	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$95.94	\$0.00					\$95.94		\$191.88	95.94%
Database Management	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Total Communications	\$8,700.00	\$0.00	\$0.00	\$1,894.52	\$0.00	\$95.94	\$0.00				\$1,488.89	\$143.74		\$3,623.09	41.64%
Other Expenses															
Retirement Planning Seminar Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$199.66	\$0.00	\$0.00							\$199.66	0.00%
Saging & Unsung & Navius Awards	\$1,000.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00						\$500.00	\$1,000.00	100.00%
Rainbow Project	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					\$175.00		\$175.00	17.50%
BLUU Donation	\$250.00	\$0.00	\$0.00	\$0.00	\$250.00	\$0.00	\$0.00							\$250.00	100.00%
Finding Your Way Home Scholarship	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Postage	\$150.00	\$0.00	\$0.00	\$74.60	\$0.00	\$0.00	\$0.00	\$16.82						\$91.42	60.95%
Connections Network	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	
Memorial Gifts - UUMA and Others	\$2,000.00	\$550.00	\$0.00	\$0.00	\$0.00	\$0.00	\$750.00			\$150.00	\$350.00			\$1,800.00	90.00%
Donations to the Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	
President's Expense	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Credit Card Processing Fees	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	0.00%
Bank Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	
Board Misc.	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	
Total Other Expenses	\$5,700.00	\$550.00	\$500.00	\$74.60	\$449.66	\$0.00	\$750.00				\$350.00	\$175.00		\$2,849.26	49.99%
Total Expense	\$34,500.00	\$550.00	\$500.00	\$2,792.89	\$1,449.66	\$420.94	\$7,855.22			\$1,770.58	\$2,481.26	\$3,766.00	\$500.00	\$22,086.55	
Profit/Loss	\$0.00	-\$400.00	\$4,228.47	\$635.03	\$1,378.88	-\$302.49	-\$7,855.22			\$2,086.42	\$2,591.85	-\$3,766.00	\$2,315.01	\$911.95	
Ending Account Balance															
Endowment		\$100,830.42	\$101,700.32	\$105,719.66	\$103,110.83	\$103,110.83	\$105,048.74	\$105,812.11	\$107,381.99	\$109,253.86	\$111,688.36	\$109,304.93	\$111,820.00		
Money Market		\$19,242.48	\$19,243.24	\$19,244.05	\$19,244.84	\$19,245.65	\$19,246.44	\$19,247.26	\$19,248.08	\$19,248.87	\$19,249.69	\$19,250.48	\$19,251.30		
Checking		\$17,390.82	\$21,619.29	\$22,254.32	\$23,633.20	\$23,330.71	\$15,475.49	\$13,897.30	\$10,412.31	\$12,349.00	\$14,940.85	\$10,971.11	\$13,286.12		
Total		\$137,463.72	\$142,562.85	\$147,218.03	\$145,988.87	\$145,687.19	\$139,770.67	\$138,956.67	\$137,042.38	\$140,851.73	\$145,878.90	\$139,526.52	\$144,357.42		