University of Michigan Retirees Association  
ANNUAL REPORT  
September 2017 through August 2018

Communication Committee Report - Jim Bell, chair; Ed Adams; Pat Butler; Nancy Firestone; Sharon Grayden; and Jim Randolph.

The UMRA Communication Committee had a productive year working on items that were discussed at the planning conference in February and items that came up as the year progressed. They are as follows:

Refreshing of the UMRA website:

Plan A - The Committee submitted a proposal to the School of Information to be part of the SI 500 class projects, where students help organizations work on informational projects. We made it through both the written requirements and a brief oral review; however our project was not selected by any of the student groups.

Plan B - We submitted an email to a School of Information email list asking for some help with the website. We heard back from a number of people, some of whom were corporations and businesses, both local and across the nation. We interviewed a student at the School of Information who was available during the summer and had an interest in doing the work. We discussed a plan to pursue our website project with the student, had the Board approve the funding required and verified that we could pay the student. The student was going to be hired as a temp employee, until we discovered he was already working full-time for the university in another area. While the issue of overtime was resolved to allow for the payment, the timeframe that was finally worked out did not appear to allow for the completion of the work prior to school starting in the fall of 2018.

Plan C - The Committee then investigated using GoDaddy as a way for us to create our own website. We used GoDaddy's free 30-day trial period to test the GoDaddy web development application, and after basic exploration, a preliminary design was created using criteria developed from the plan B work. We determined that PayPal was the most convenient option and fit nicely with the financial reporting requirements of UMRA. To get the PayPal option set up required the month of July. We are now ready to begin revising the UMRA website and plan to complete the work this fall.

Prepare pre-retirement video: To give UMRA more visibility with members of the U-M who are contemplating retirement, we are working on producing a video about UMRA. This process was started with the development of a theme and a script. The Board approved a budget of up to $5,000 for this project. We have been in contact with the U-M’s Michigan Creative and we are currently waiting to hear back from them about the schedule and the price to complete the video.

Liaison presentation: A presentation package was developed for Rich Holcomb, the UMRA liaison appointed by the President’s Office. The document chronicled accomplishments and changes within the UMRA over the last two years. This document took some time as it was drafted and reviewed by the entire Board. We met with Rich on July 31 and discussed the progress as reported in the presentation as well as our future direction and communication opportunities. We will continue to keep Rich apprised of our activities by providing him with special reports and sharing the minutes of monthly UMRA Board meetings. We will also schedule quarterly meetings with Rich to update him on our activities and seek his guidance regarding next steps to enhance the UMRA/U-M relationship.
Advertisement in the University Record: In February we ran an ad in the University Record to help inform all U-M retirees of UMRA and the programs we were presenting in the last half of the 2017-2018 academic year. This ad required planning of the content and the layout of the piece. We worked with the University Record to accomplish this, using a photo of attendees at one of our meetings as a background.

Big Ten Retirees Association communications survey: We prepared a survey of the other members of the Big Ten group about communications. Most of the questions related to the ways the other retiree associations communicate with their members. The survey results have been very helpful, allowing us to benefit from the experiences, both positive and negative, of other Big Ten members as we continue to structure our plans for going from mainly print communications to mainly digital. Results of the survey were shared with all of the members of the Big Ten Retirees Association.

Social media presence: A social media presence has been developed for UMRA on multiple platforms: Facebook, Twitter, and Instagram and will be rolled out to the entire membership coming this fall. We will have an upcoming session at a monthly meeting to help our membership learn about the use of the platforms. We also proposed and received approval of a social media policy from the Board.

Direct Communications: The Committee has created a number of informational communications for our members and potential members during the year. These include three paper newsletters sent to members, nine email monthly announcements/updates, and the annual all-retiree letter.

UMRA logo change: We received permission from the Office of VP Communications for UMRA to use the official U-M Block M logo. We worked with the communications office to develop official email signatures and letterhead. This was documented and distributed via written instructions to help the Board members add the Block-M signature to their email.

Cloud storage options: We looked at the options we could use to store our online information in a Board-only domain and agreed to use the MBox function within the University. UMRA’s MBox storage has been set up and is currently used to store some of the UMRA data.

Dell retiree discount site: We explored a Dell member purchase website with a goal of offering discounted pricing for Dell computers and peripherals. A prototype was developed and reviewed by the full Board. This item was put on hold because UMRA is currently unable to authenticate dues-paying members via the website.

All-digital communications: We are researching the issues and changes that would need to be made to allow a transition to primarily digital distribution of our UMRA communications. At this point, we are working on implementing changes that will help us achieve that goal. We understand that full implementation will take time and require the modification of some of our existing systems.

Nominating Committee Report, - Jim Randolph.

Board Membership
Prior to the start of the 2017/2018 program year, Jim Middlemas asked that his Board appointment not be extended beyond 2018.

The Committee contacted each current Board member who had an appointment term ending in December 2018. A potential slate was presented to the Board for the October meeting. At the October 12, 2017 UMRA Annual Meeting, the Committee presented the following slate of Board appointments, all to be effective with the December 2017 Board meeting:
• Al Hermsen, reappointment for a three-year term
• Larry Jones, reappointment for a three-year term
• Duane Kirking, reappointment for a three-year term
• Rodger Wolf, reappointment for a three-year term
• Ed Adams, confirming reappointment for a one-year term
• Vi Barkauskas, confirming reappointment for a one-year term
• Jim Bell, confirming reappointment for a two-year term

The Committee invited comments from the meeting attendees, for or against any of the nominees; there were none. Noting that one open slot remained, the Committee invited nominations from the floor; there were none. The proposed slate was put up for a single voice vote, resulting in approval as proposed.

John Drach indicated interest in joining the Board. The Committee presented his name for approval at the November 8, 2017 Board meeting. The Board approved his appointment for a three-year term effective with the December meeting. *(Note: per the UMRA Constitution, the final two years of his term will require membership approval at the 2018 Annual Meeting.)*

Fred Beutler submitted a letter resigning from the Board in November 2017. His appointment term was through December 2019.

Sharon Grayden indicated interest in joining the Board. The Committee presented her nomination via e-mail on January 10, 2018, asking for comments and an electronic approval vote. The Board approved her appointment through December 2019, effective immediately. *(Note: per the UMRA Constitution, the final year of her term will require membership approval at the 2018 Annual Meeting.)*

During the summer of 2018, Don Thiel and Judy Dean asked that their appointments not be extended beyond 2018.

**Board Officers**

During the fall of 2017 the Committee invited interest from potential candidates for Board officer positions.

At the December 13, 2017 Board meeting the Committee presented the following slate of officers for 2017/2018:

• Pat Butler for President
• Jim Bell for Vice President (President-Elect)
• Rodger Wolf for Treasurer
• Jim Randolph for Secretary

The Committee called for comments and nominations from the floor; none made. The Board voted unanimous approval for this officer slate. Appointments were effective immediately, for a term of one year.

**Program Committee Report** - Vi Barkauskas, chair; Pat Butler; Al Hermsen; and James Bell (ex officio)

The monthly programs maintained their usual framework, with a social time from 1:30 to 2:00 PM, with announcements and the presentation following at 2:00 PM. Presentations characteristically lasted 45 minutes, with 15-30 minutes for questions and discussion afterward.

All speakers were booked well in advance and posted in the *University Record* and *U-M Happening* so that more people would be informed. Not only did the Committee arrange for the speakers for the 2017-18 year, but we also engaged speakers for all of our meetings for the
2018-19 year. This is the first time all speakers have been set up before the new program year began. We believe this will inspire more people to become members and set aside time to attend our meetings. The 2018-19 listing of speakers is listed on the UMRA website and in the Newsletter.

The Program Committee planned and provided nine programs during the reporting year. The speakers, presentation titles, and attendance are as follows:

<table>
<thead>
<tr>
<th>Date</th>
<th>Speaker and Title</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 17, 2017</td>
<td>William Potter, U-M Marsh Visiting Professor of Journalism Title: <em>From Propaganda to “Fake News”: A History of how not to be duped</em></td>
<td>120</td>
</tr>
<tr>
<td>October 12, 2017</td>
<td>UMRA Annual Business Meeting</td>
<td>112</td>
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<tr>
<td>November 4, 2017</td>
<td>S. Jack Hu, U-M Vice President for Research Title: <em>Update from the U-M Office of Research: Current and Future U-M Research Initiatives</em></td>
<td>91</td>
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<tr>
<td>December 14, 2017</td>
<td>H. Luke Shafer, Director of Poverty Solutions, U-M Associate Professor of Social Work Title: <em>Poverty Solutions at the University of Michigan</em></td>
<td>68</td>
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<tr>
<td>January 11, 2018</td>
<td>Brian Kaufman, Executive Video Producer, Detroit Free Press Title: <em>Anniversary of the Detroit Riots</em></td>
<td>105</td>
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<tr>
<td>February 8, 2018</td>
<td>Jerry May, U-M Vice President for Development Todd Bailey, Capital Campaign Director Title: <em>Update on the University of Michigan Capital Campaign</em></td>
<td>59</td>
</tr>
<tr>
<td>March</td>
<td>Adreanne Waller, Senior Analyst/Epidemiologist Washtenaw County Health Department Title: <em>The Opioid Epidemic</em></td>
<td>106</td>
</tr>
<tr>
<td>April 12, 2018</td>
<td>Andrew Richner, Regent, University of Michigan Title: <em>An Update on the University of Michigan Regents: Current Initiatives</em></td>
<td>88</td>
</tr>
<tr>
<td>May 10, 2018</td>
<td>Ralph Williams, U-M Professor Emeritus, English Language and Literature Department Title: <em>The Fall in the Garden of England: Shakespeare on the Descent into Civil War</em></td>
<td>85</td>
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</tbody>
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**MHealthy Advisory Committee (MHAC) Report** - Duane M. Kirking, UMRA Representative.

“MHealthy is a university-wide effort to support the health and well-being of the university community by providing resources designed to help achieve a safer, healthier and more satisfying way of life.” The program is housed in the U-M Human Resources unit.

MHAC is composed of members of the University community with the purpose of guiding and supporting the programs in which MHealthy is involved. MHAC has about two dozen members plus staff. UMRA has one representative, selected by the UMRA Board of Directors and confirmed by the MHealthy administration. MHAC generally meets bimonthly and had six meetings in the 2017-2018 year.

While there is stated MHealthy support for the University’s retirees, the challenge is to get the University to include retirees in its programs. There are a variety of reasons for this situation including costs, structural issues (e.g., retirees don’t have as strong a connection to the University data system), and lack of visibility ("out of sight, out of mind"). My goal is to work to overcome these challenges. While some progress has been made, I must be persistent in my efforts.
The primary areas included in the 2017-2018 agenda include vaccine use, smoking/tobacco cessation, problems of lower wage earners, and opioid use as well as follow ups on previous programs such as diabetes, back pain, and depression/anxiety. The Committee learns of the extent of problems in these areas, makes suggestions for interventions and follows the progress of these programs.

A positive side benefit from this participation is to be able to strengthen relationships with key Human Resources people (e.g., Laurita Thomas, Assoc. VP for Human Resources and Rich Holcomb, Senior Director for Benefits) who are UMRA’s primary contacts in the University administration.

**Special Events Committee Report**– Judy Dean, chair; Pat Butler; Tom Butts; Don Thiel, and Rodger Wolf.

The committee was established in September 2017 and held its first meeting September 21. The purpose of the Committee is to provide a planning body to coordinate annual events, such as Health Day, and to recommend, plan, and assess the possible addition of other events (gatherings outside regular monthly meetings) that may be of interest and value to UMRA members.

A summary of this main year’s activities, as well as “next steps” is as follows:

**Lunch & Learn Series.** New in the fall of 2017 was the introduction of a series of informational presentations we called “Lunch & Learn”. The pilot featured free, hour-long (noon-1pm) personal-development forums that tapped into expertise available from one of our sponsors. Each session preceded a general meeting and topics were loosely organized around a financial theme. Drop-in participation (no sign-up required) was encouraged, and attendees were invited to carry in a brown-bag lunch if desired. Coffee and cookies (also offered during general meeting) were served.

Our original plan for three presenters (February, March, and April meetings) was expended to four (May) based on positive feedback from members and interest from sponsors. Invitations to sponsors required that they refrain from using the forum to pitch services to members or promote their organizations. Sponsors seemed pleased to be given this opportunity to share their knowledge and improve visibility to the UMRA community. Attendance increased at each session.

- **February 8:** “Estate Planning 101” (20 attendees)
  Presenter: Attorney Terry Bertram, Legacy Law Center

- **March 8:** “Avoiding ID Theft and Financial Fraud” (48 attendees)
  Presenter: Mark Muzenburger, U-M Credit Union

- **April 12:** “Top Five Investment Mistakes Retirees Make” (56 attendees)
  Presenters: David Fransko & Alan Brilliant, PROVIZR

- **May 10:** “Planning for Loss: The Topic No One Wants to Discuss” (67 attendees)
  Presenter: Pamela Loduca-Massa CFP, Retirement Income Solutions

The Committee feels that the “Lunch & Learn” concept was validated by member interest and would like to continue with additional programs this fall. Some changes will be necessary when we move to Weber’s (for example, members will not be allowed to carry in food) so planning has been started to make those adjustments. Additional program ideas are also being discussed.
Co-Sponsored Guest Speaker with the Osher Lifelong-Learning Institute (OLLI).
This spring we were offered the opportunity to co-sponsor a speaker with the U-M Geriatrics Center and Osher Lifelong Learning (OLLI). The speaker was also sponsored and paid for by the Institute for Healthcare Policy and Innovation (IHPI). The presenter was Dr. Eric B. Larson and his topic was “Enlightened Aging: Building Resilience for a Long, Active Life”. The event took place on May 11 from 2:00 to 3:30 at the Morris Lawrence Building at Washtenaw Community College. Approximately 240 UMRA members pre-registered for this free event. We agreed to split the speaker fee, video recording plus WCC room costs with OLLI, (our share, approved by the Board, was $511). Although turnout was good, feedback on this specific event was not fully positive so the Committee will need to decide whether we want to co-host events of this type in the future.

Health Day 2018. UMRA’s 13th annual Health Day was held on Tuesday April 24 at Weber’s Inn. As in previous years, turnout was strong: 120 members paid $16 to attend the full-day program that included lunch. The additional cost of Health Day ($5,182) was unwritten ($2,910) by M-Healthy/UHR. New this year was the addition of three informational tables staffed by representatives who were interested in raising awareness of their organizations and in some cases soliciting for volunteers.

Feedback from 2017 Health Day attendees helped shape the 2018 program. This year 82 of the 120 attendees returned evaluation forms that provide feedback about individual presentations as well as suggestions for next year’s program.

Overview of the 2018 Program:
7:45-8:45: Registration, Coffee and Refreshments
8:45-9:00: Welcome & Introduction – Pat Butler, President, UMRA
9:00-9:45 (+15 minute Q&A): Thad Polk, PhD. Brain Aging and What You Can Do About It! Arthur F. Thurnau Professor, Associate Chair, Psychology
10:00-10:10: Break – Stretch, Move, Be Active
10:10-10:55 (+15 minute Q&A): Sally L. Lusk, PhD, RN, FAAN, FAAOHN. Reduce Noise, Improve Your Health. Professor Emerita, UM School of Nursing
11:10-11:20: Break – Stretch, Move, Be Active
11:20-12:05 (+15 minute Q&A): Richard Andres, Owner and Farmer, Organic Food, Nutrition, Health, and Farming. Tantre Farm, Chelsea, MI
12:50-1:50: Lunch
1:50-2:35 (+15 minute Q&A): Raymond Yung, MB, ChB. Physical Activity and Exercise for Older Adults. Chief, Division of Geriatric and Palliative Medicine
2:50-3:00: Break – Stretch, Move, Be Active
3:00- 3:45 (+15 minute Q&A): Sandra Merkel, M.S.N., RN. Your Voice! Your Choice! Your Health! Clinical Nurse Specialist, University Hospital
4:00 Discussion, Evaluation, End of Program

Looking ahead to 2018-2019. The Special Events Committee has met twice (May 30 and July 24) so far this summer. We’ve focused on next steps for the Lunch & Learn program (tentatively re-named “Learn & Grow” to reflect the fact that members won’t be able to carry in lunch at Weber’s this year). We’re hoping to offer two technology-themed programs (November and December meetings) this fall with possible extension into January. Topics and speakers are in the preliminary planning stage. Health Day will continue, with April 30 proposed as the possible date for the 2019 program.

Finance and Sponsorship Committee Report - Rodger Wolf, chair; Tom Butts; Al Hermsen; John Drach; Don Thiel; Jim Randolph.
During the year we expanded the function of the Treasurer into a Finance Committee and folded the existing Sponsorship Committee into one committee. The Treasurer, Rodger Wolf, performed all of the normal duties such as coordinating the deposit of dues and contributions, payment of expenses, and creating monthly financial reports. He also submitted the required annual Federal and State reporting forms and the Michigan Attorney General Office’s Charitable Solicitation Registration. The Treasurer also worked with the Audit committee which reviewed the records and procedures for the preceding fiscal year.

During the year we had 11 sponsors. At the end of the year we started contacting existing sponsors to renew and developed a list of potential new sponsors. We were able to retain 10 of the existing and secured 6 new sponsors for a total of 16 sponsors for our 2018-2019 year. The sponsors are Bank of Ann Arbor, Brookdale Ann Arbor Network, Brookhaven Manor, Fidelity Investments, Fox Run Retirement Community, Heartland Health Care Center, Homewatch CareGivers of Ann Arbor, Legacy Law Center, LifeChoices, Linden Square Assisted Living Center, PROVIZR, Retirement Income Solutions, Silver Maples Retirement Neighborhood, StoryPoint, University of Michigan Credit Union, and Ashley Yashin with Edward Jones.

The committee met and developed the first official budget to be approved by our association for the 2018-2019 fiscal year. Financial data for the past three years are provided as an addendum to this report.

**Travel Committee Report** - Norel Tullier, chair; Pat Butler; Carol Williams; Fred Beutler; Deanna Beyer.

The Committee continued to focus on one-day events, sometimes using the services of Bianco Tours. Carol Williams has served as the primary contact with Bianco Tours. Other Committee members have worked with different organizations to arrange tours directly with the organization. Below is a list of the events that occurred during this time period.

- **Inside Detroit Tour** – Bianco Tours – September 12, 2017
- **Bentley Library Tour** – arranged by Deanna Beyer – October 17, 2017
- **Parade Company Tour** – Bianco Tours – November 2, 2017
- **Botanical Gardens Tour** – arranged by Deanna Beyer – January 30, 2018
- **Porgy and Bess** – presented by the University Music Society – February 17, 2018
- **Kelsey Museum of Archaeology Tour** – arranged by Deanna Beyer - March 27, 2018
- **“Savannah Sipping Society” Luncheon Theater at Turkeyville** – Bianco Tours – May 8, 2018
- **Harlan Hatcher Graduate Library Tour** – arranged by Deanna Beyer - May 9, 2018
- **Cruising the Gilmore Tour** – Bianco Tours – June 2018 (cancelled - low participation count)
- **Toledo Mudhens Game** – Pat Butler arranged for group tickets – June 26, 2018

As we look forward to the 2018-2019 year, events have been planned for September – December, 2018 and January 2019 and March 2019. We expect to attend another Mudhens Game and enjoy another play at Turkeyville. Event announcements will continue to be made at monthly UMRA meetings and in newsletters. We also appreciate the support of the UMRA website developer to present events and application information.

**Senate Representative Report** – Lawrence Jones

The Senate Assembly is a group of about 80 members, primarily faculty, who represent the spectrum of Colleges, Departments, and units in the University. The meetings are held once a month, October through April) and are devoted to the spectrum of University issues. Two members of the UMRA Board are non-voting members of the Assembly. It is their responsibility...
to learn about issues affecting retirees, and (of course) to follow the evolution of issues relevant to the entire University community.

**Advisory Committee to Recreational Sports Representative Report** - Albert Storey, representative.

No committee meetings to report.

**Committee on Economic Status of the Faculty Representative Report** - Fred Beutler, representative.

The Committee for the Economic Status of the Faculty has not been active for the past year. The UMRA representative, Fred Beutler, has resigned his position as representative.

**Pharmacy Benefits Oversight Committee Report** Representative – Duane Kirking

This Committee has not met during the past year.

**Audit Committee Report** – Don Thiel, chair; Jim Middlemas; Jim Bell

An audit was completed on 09/25/2017. The Audit Committee met with the UMRA Treasurer, Rodger Wolf on September 25, 2017 to review the financial information of UMRA. The committee was introduced to the processes that have been developed and put in place to ensure the accuracy of the organization’s records. Internal controls that are in place to ensure the safety of the data and records also were discussed. A detailed testing of the records to verify the processes and the accuracy of the records was performed. Below are some examples of this testing for expenses:

1. Tracked from the UMRA income statement to the summary accounting records to the detail accounting records to the receipt and check number level. This was done for newsletter expenses.
2. Did the same type of tracking using the University SOA set of accounts for copying expense.
3. Looked at postage costs of the mailing and happened to review the month that UMRA was charged at the wrong rate. We also were able to track the correcting entry.
4. Reviewed the food costs by starting with the hotel invoice and following the expense into the accounting records.

Balances of cash in the three UMRA bank accounts—the savings CD, the checking, and the University short code, were verified.

The posting of income was also reviewed with the booking of the income from the CD being reviewed as at the last audit there was an adjusting entry made. No need for any adjustments was found during this review. The dues, contribution and sponsorship funds were also reviewed to verify the processes for the posting.

The only real risk area is the posting of the revenue due to the size of the UMRA accounting statements. Internal controls were reviewed and found that there is sufficient delineation of duties to allow for the safe handling of these funds. The actual receipt of cash is very small, most funds are received via a check.
Three documents that UMRA is required to file each year either with the State of Michigan or the Internal Revenue Service also were reviewed and all found to be in compliance with the agencies for timeliness.

**Webmaster Report** - Nancy Firestone

Between September 2017 and August 2018, new and updated pages and documents on the UMRA website totaled 109. This number includes changes made on the Big Ten website, which UMRA manages for the benefit of the Big Ten universities that have retiree associations. The majority of changes on the UMRA website were made to inform members about the monthly UMRA programs organized by the Program Committee and the trips planned by the Travel Committee.

A complete revision of the UMRA website is underway and is expected to be completed fall of 2018. The status of this revision project is described in the Communication Committee Report on pages 2-3 of this document.

**Board Members, 2017-2018**

Patricia M. Butler, President
James A. Bell, President Elect
James Randolph, Secretary
Rodger Wolf, Treasurer
Edward E. Adams
Violet H. Barkauskas
Frederick J. Beutler
Judith Dean
Donald L. Thiel
Thomas A. Butts
Nancy Firestone
Sharon K. Grayden
John C. Drach
Al Hermsen
Lawrence Jones
Duane M. Kirking
## ADDENDUM

Financial Data for University of Michigan Retirees Association

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<tr>
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<td><strong>BEGINNING BALANCES</strong></td>
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<td>Health Day</td>
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<td>Travel Prog, Interest &amp; Other Income</td>
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<td>Member dues</td>
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<td>Sponsorship</td>
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<td><strong>EXPENSES</strong></td>
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<td>Newsletter Prep</td>
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<td>Office Expenses</td>
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<td>656.32</td>
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<td>Supplies (Bicen Books)</td>
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<td>600.64</td>
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<td>Advertising</td>
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<td>Bicentennial 2017 Expenses</td>
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<td>Co-funded Programs (Enlighted Aging)</td>
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<td>Health Day</td>
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<td>Incorp</td>
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<td>Misc, AROHE, Memorial, and Bank Charges</td>
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<td>UMRA Brochure</td>
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<td>Website and Database Design</td>
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<td><strong>INCOME LESS EXPENSES</strong></td>
<td>13,487.24</td>
<td>14,414.23</td>
<td>3,066.29</td>
</tr>
<tr>
<td><strong>ENDING BALANCES</strong></td>
<td>63,484.10</td>
<td>49,996.86</td>
<td>35,582.63</td>
</tr>
</tbody>
</table>