

From: Organizational Continuity Committee  
Date: August 2022  
Re: Toolkit components

The following documents are the emails sent as part of the summer annual updates.

The first is the email sent to request Toolkits and Annual reports

The second is the email sent to request updates to web pages and content from those who are the "owners."

The OCC Owners web-docs22 spreadsheet names all who are asked to submit annual reports and toolkits, and those requested to submit web content updates.

DATE: June 20, 2022

TO: UMRA Board of Directors

FROM: Cathy Lee Gierke, Chip Peterson, Jerry Rinehart, Julia Wallace-- on behalf of  
**Organizational Memory and Continuity Committee (OCC)**

RE: Annual Reports and Updates

Among several recommendations approved by the UMRA Board in October 2020 to improve organizational memory and continuity were the following:

- Coordinating submission of annual reports for the Archives and the UMRA Website
- Clarifying responsibilities and timelines for these materials

Numerous other important continuity recommendations were also approved, and the full document is in the 2020-21 OCC Annual Report (see "Note" below for access information). It would be helpful for all, but especially new Board members, to review this material.

Today, however, we simply want to focus on submitting annual reports and updating key organizational documents on the web.

1. Annual Report Process: All Officers, Committee and Task Force chairs, Special Interest Group chairs, Liaisons and Representatives, and the Database Manager, Editor, and Webmaster, should email Annual Reports and Toolkits to both Cathy Gierke and Julia Wallace. The updated materials need to be returned by September 1, 2022. The appropriate documents will then be printed for Julia to deliver to the Archives.
2. Updating Key Web Materials: All those responsible for a web page or key document page are being sent an email that includes links to the documents or pages to be updated. Each person is asked to download or copy the element(s) for which they are responsible, update it, and submit it to both Cathy and Julia. (Cathy can assist with document conversion if you do not have Word, or cannot convert the document for update.) As with annual reports & Toolkits, the updated

materials need to be returned by September 1, 2022. Appropriate documents will then be printed for Julia to archive.

Annual Reporting and Updating are among the most important activities undertaken each year to insure that critical UMRA events, accomplishments, and challenges are documented and that key records and web materials are accurate and up-to-date. We need to know both where we have been and what our current status is to remain an efficient and effective organization. We truly appreciate your cooperation..

The Organizational Continuity Committee members for 2022-23 are the following people/positions:

Co Chairs: Chip Peterson, Jerry Rinehart

Webmaster: Cathy Gierke

UMRA Archivist: Julia Wallace

UMRA Secretary: Julie Sweitzer

Communication and Outreach Committee Chair: Jean Kinsey

UMRA President: Ron Matross

UMRA President-Elect: Eric Hockert

If you have questions or suggestions, please contact Chip, Jerry, Cathy or Julia. Thank you.

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***NOTE: Organizational Continuity Committee Annual Report and Related Documents, 2020-21 can be accessed from the UMRA website at:***

***[https://umra.umn.edu/sites/umra.umn.edu/files/occ\\_annual\\_report\\_2020-21\\_0.pdf](https://umra.umn.edu/sites/umra.umn.edu/files/occ_annual_report_2020-21_0.pdf)***

*See especially pages 3-5, and 8-13.*

Hi all,

This email is going to those who have web content -- either a web page, or document. Once a year we do a full update of the main pages and documents on the UMRA website. Please see your name below, and a link to the document(s) to be updated over the summer. Updates are due Sept 1. The Organizational Continuity Committee thanks you!

**How to update documents:**

Click on the link(s) beside your name below to access your documents.

**Web content:** If you are listed as “owner” of a webpage, copy the content into any word editor, such as Word, and update it.

**Documents:** If you are updating a document that currently resides on the website, the most reliable way to be sure you have the latest version of your document is to download it from the website. Simply click on the link beside your name in the attached document, and the document will open in a browser. To download it, click on the download icon in the upper right corner of your browser window. (Don't SAVE or EXPORT it.)

The downloaded document will be in PDF format. You can open any PDF and convert to Word simply by opening Word, then finding the document you downloaded and selecting Open. It will auto-convert to Word, so you can make your changes easily. If you need help making it editable, let me know. Whether you are updating an existing document, or creating a new one, email your update document to us in any format. I can convert it to PDF.

Please email your document(s) to both me and Julia Wallace. You can simply Reply All to this email. As with annual reports & Toolkits, the updated materials need to be returned by September 1, 2022. Appropriate documents will then be printed for Julia to archive.

If your name or position is listed below, click on the link and **download the original document, or copy the webpage text**, update and email to me.

**Document**

**Document Owner**

*Click on the link below to download the latest document to be updated*

<a href="#">Secretary</a>	Julie Sweitzer
Treasurer's final financial report, 2020-21	Treasurer, Greg H
<a href="#">Personnel</a>	<b>Incoming President, Ron Matross</b>
<a href="#">Operating Manual</a>	<b>Outgoing &amp; incoming Presidents</b>
<a href="#">Organization Chart</a>	(Jerry Rinehart?)
<a href="#">UMRA monthly speakers since 2004</a>	<b>Program Chair, Ron M</b>
<a href="#">UMRA workshops since 2006</a>	Workshop chair, Ron M
<a href="#">UMRA officers since 1992</a>	<b>Incoming President, Ron M</b>
<a href="#">UMRA board members since 1993</a>	<b>Incoming President, Ron M</b>
<a href="#">Bylaws -- is there a need to update this year?</a>	Outgoing President, Jan Morlock
Membership directory	Membership -- database, Virgil L (not sure when we do this next?)
Survey Results/Summaries	Ron Matross, others??
<b>The below are all pages on the web</b>	<b>web page owner (current chair)</b>
<i>Click on the link beside your document to find the page, and copy the content into a Word document. Update it there to reflect our current circumstances, then send me the Word doc.</i>	
<a href="#">Home--&gt;About Website</a>	Webmaster, Cathy Lee Gierke
<a href="#">Home--&gt;Members by Location</a>	Will Craig (in odd years)
org chart	Gerald Rinehart, Cathy
<a href="#">Events--&gt;Book Club I:text</a>	Pat Tollefson
<a href="#">Events--&gt;Book Club II:text</a>	Dorothy Mardan, Margaret Catambay
<a href="#">Events--&gt;Armchair Traveller: text</a>	Lynn Anderson
<a href="#">Events--&gt;Family History: text</a>	Craig Swan and Lynn Anderson
<a href="#">Events--&gt;Financial Legal: text</a>	Andy Whitman

<a href="#">Events--&gt;Hiking: text</a>	Bev Moe
<a href="#">Events--&gt;Photo Club: text</a>	Craig Swan
<a href="#">Events--&gt;Zoom Techs: text</a>	Virgil Larson
<a href="#">Events--&gt;Monthly Programs--&gt;Forum Reservations</a>	Diane Young
<a href="#">Member Benefits</a>	Membership, John A
<a href="#">Member Benefits--&gt;Join Renew</a>	Incoming pres, Webmaster
<a href="#">Member Benefits--&gt;Discounts</a>	Membership, Bev Moe
<a href="#">Member Benefits--&gt;Resources</a>	Ron Matross
<a href="#">ServingU--&gt;URVC: texts</a>	Jerry Rinehart
<a href="#">ServingU--&gt;Cares: texts</a>	Kathleen O'brien
<a href="#">ServingU--&gt;JOIE: texts</a>	Kris Bettin

If you feel I have contacted you in error, please let me know.