

Joint Task Force
Report for May 23.2001 Annual Meeting

In September 2020 the board created a joint task force of finance committee representatives Liz Kipp and Dennis Cramblit and personnel committee representatives Carrie Rice and Danielle Stedman. The charge was to respond to recommendations from Eide Bailly's report on our internal controls and to recommend updates to our financial policies manual. Reverend Rita Capezzi and Penny Herickhoff also service ex-officio.

We reviewed the essential tasks performed by the treasurer and the office administrator, particularly in light of the planned retirement of our office administrator in spring 2021. The job description was updated to communications and office manager. We met with office managers at 4 other UU congregations in Minnesota to gather ideas on who does what.

In December, the task force convened a joint meeting of the personnel and finance committees, which recommended that the board authorize the personnel committee to screen bids from third party service providers for bookkeeping and payroll services. The expectation was that the costs here plus the planned cost for the new office position be roughly equal to the current office administrator. The board authorized the personnel committee to go ahead. Two bids were received: Morken Eckberg Steiner LLC (MES) was selected. As chair of the joint task force, Liz Kipp has managed much of the communication between MES and UUFM. MES began running payroll for our employees in January 2021 and they transitioned our bookkeeping software to Quickbooks Online in February.

During March and April, regular communication took place between MES, Liz from the joint task force, our retiring office administrator Linda Ganske, our newly hired communications and office administrator Melissa Martensen, other church staff and our treasurer.

Reverend Rita and the personnel committee representatives have drafted updates to our financial policies and employee manual.

Submitted by Liz Kipp, May 19, 2021