

LIFE WORK PLANNING EXERCISES OVER THE YEARS

1. 1977 - restless in Chicago, and discovering the field of life/work planning.

Writing my work autobiography was a first step, but in addition I was asked to look at my achievements thus far, linking those to the skills used and developed thereby. This became a central piece of the vocational process I later used in Life/Work Direction.

Five Most Important Achievements in My Life So Far

1. I changed my life through therapy, and learned how to grow.
2. I helped create, develop, sustain and bring to success the Urban Life Center.
3. I wrote *The Development of Pioneer Girls Philosophy*—researched it, helped formulate it, articulate it, and adapt it cross-culturally.
4. I helped put the field of Christian camping on the map by helping develop and publicize Pioneer Girls' camping philosophy and standards and by directing camp successfully—especially in Colorado.
5. I developed the Denver area of Pioneer Girls, practically from scratch, into a thriving center of work requiring a full-time worker.

A second step: Identifying the skills I used and developed:

Develop and carry out a simple entrepreneurial scheme from start to finish.

Work cooperatively with a partner in an entrepreneurial venture, complementing skills.

Do short-range budget planning and financial computation.

Organize routine tasks in a way to derive a modicum of pleasure and satisfaction from their accomplishment.

Be dependable and responsible to perform tasks above and beyond the required without monetary compensation.

Is a dramatic public speaker, storyteller, and song leader; able to hold large audiences spellbound.

Adept with words in public speaking.

Create, develop with others, a mixed media program events carrying a special thematic message and impact. Able to interweave complex array of ideas and media so as to achieve maximum impact.

Able to create dramatic intensity in otherwise ordinary situations/meetings.

Gifted teacher in informal setting with small groups. Achieve impact on others.

Secures active learner participation in teaching situations.

Articulate in writing, combining humor and sentiment with clarity.

Expresses and evokes humor in leadership of groups.

Ferrets out ideas and resources to be used by other people.

Takes good ideas from one context and adapts them to another.

Writes clear and appealing copy—especially program ideas and philosophy.

Types 80 wpm, thinking as I type.

Writes fresh articulate letters.

Collates, stuffs envelopes, organizing materials efficiently.

Gets printers' estimates, being able to talk their language and not waste time.

Talks on the phone to strangers and unfamiliar agencies, and gets information desired effectively and rapidly with a minimum of hassle and inconvenience.

Deals courteously and wisely with salespersons; being direct, yet tactful, when necessary to correct an error or reject a sale.

Critically analyzes a program or group of printed materials, and develops a conceptual framework for evaluating and revising them as needed.

Leads a group of persons in the critical analysis described above, and enlists their participation, integrates their ideas, securing their initiative in follow-through.

Creatively devises a new direction in program, and develops a scheme for carrying it out and follows through until the materials are developed and the new program is in operation.

Organizes and writes a "how to" manual.

Represents an organization to a national body effectively, and communicates both to the national body and the organization the perspective of the other.

Absorbs ideas from a new source, and able to radically change thrust of an established program as a result. Not bound to set ideas and customs. Open to deep change.

Supervises a large staff of diverse persons, located at geographical distance from each other, by means of good thorough communications, and the development of "family spirit."

Chooses and trains volunteer workers wisely and well.

Plans organizational work carefully, solidly, thoroughly.

Trains interns in a field of specialization involving theory and practice combined, and within a residential setting.

Helps a small group analyze its process.

Facilitates personal growth in a group context.

Creates an environment (physical, emotional, psychological) conducive to personal and group growth.

Assists others to identify their goals, and facilitates their achievement.

Able to get a good grasp of a brand new field (or subject) starting from zero, and do it rapidly and competently (not in-depth understanding).

Adept at incorporating humanly-oriented group processes with the presentation of *content* in a teaching situation.

Counsels young adults in a way that positively reinforces their sense of themselves as valued persons, and is conducive to their self-assertion and becoming stronger.

Perceptive in helping others do a better job of pinpointing their strengths and weaknesses, especially in the helping professions (counseling counselors).

Energetic group leader.

Perceptive about group processes, strong and mature facilitator of groups.

Building on that I knew I needed to make another list:

What I Need in Order to Function Effectively

Right off the cuff, these came to mind:

I need. . .to function effectively. . .

A space of my own, with things well-organized.

Enough time for joint planning with others in order to communicate well, without a sense of being rushed.

Staff meetings that include time for sharing work experiences sometimes, and sometimes time for “future-thinking”.

Inviolate times for weekly supervision and staff meetings.

Direct responses from staff members when I overstep bounds and need to be challenged; also non-gushing appreciation for areas I am working to grow in (which I would like to be able to share)

Stimulus on the idea level from various sources to avoid getting ingrown-volunteers around the lunch table, outside training opportunities, whatever.

Times to share responsibility with others—like the Advisory Committee meeting, Job Fair, Raffle—and not feel it is all up to one person.

Being left alone a lot to “do my job” in my own way.

Opportunity for humor, for fun, for goofing off, for being crazy.

2. In 1980—preparing for a job

In 1980, Don and I approached Richard Faxon, the director of a downtown Boston ministry that was closing, to see if he could use our services there. In my own mind, I was looking for a place to provide “life planning” — the career path I had settled upon at the end of my time in Chicago. Here was an opportunity to exercise those skills I had taught others!

I started my thinking process by writing a specialized version of my “work autobiography” to emphasize those experiences most relevant to the work I wanted to do and which I sensed would augment his vision.

Summary of Life and Work Experiences from Birth through age 50

Early Formative Influences

My father, Emmet Russell, was a minister (Baptist, Evangelical Free) whose primary gifts lay in scholarship, writing, and preaching. He himself was converted as an adult, after graduating from Harvard. His theological training was received at Gordon College, where I met my mother, Amy Dyer, who was also ordained. After a brief three-year period in China teaching, my parents returned to New England where they served several churches in succession during my early years.

From my father I gained a spirit of optimism, a ready wit, a willingness to believe the best in others, a certain social awkwardness, but unbounded courage on a platform, eloquence in speaking, a touch of charisma and a flair for writing.

My mother taught me to work hard and uncomplainingly despite obstacles, to come through dependably on my word, to be frugal, to analyze and introspect and constantly seek growth, to give generously to others, and to seek God’s approval.

My Education and Development

At the age of 7, I left New England with my parents and after an interlude in Kansas City, settled down in Wheaton, Illinois, for the next 13 years. All of my subsequent education and development (up to maturity) was strongly influenced by the Wheaton College environment, and I attended schools connected with the college from 7th grade through graduate school. I knew my major would be Christian Education from very early years and that choice was determinative. I had a well-articulated philosophy of education by the age of 16, and many aspects of it have survived to this day.

It is difficult to pinpoint the effects of this Wheaton environment. In an autobiographical book I am writing, I have developed a chapter to trying to analyze it. The combination of Calvinism (intellectual, rational faith—with God sovereign and at a distance), Holiness influence (emotional, surrender, send of sin—with God warmly approving or punishingly stern), and Pietism (emphasis on personal mysticism nurtured by certain spiritual observances—Bible reading, prayer, witnessing) and the *absence* of any clearly identifiable ethnic or communal tradition extending beyond that geographic locale—together created a stiflingly closed community. Inside it appeared intellectually respectable, warmly spiritual, and effective in practical ways. Outside it seemed egotistical, elitist, strangely out of touch with the currents of life going on in the rest of the world.

My Professional Life

My first job—in Pioneer Girls—lasted 17 years and was a continuation of the Wheaton environment and influence. In fact, I had been active within the organization since 8th grade, then as a volunteer leader during college. During those 17 years on staff, I occupied a number of roles:

Publications Manager

- Wrote and edited curriculum and publicity
- Learned production process (layout, printing)
- Recruited and supervised freelance writers

Field Representative

- Made contacts with pastors and “sold” program to them and churches
- Trained local leaders
- Planned, organized and ran retreats, workshops, rallies, conferences
- Recruited and developed volunteer administrators

Took a weak undeveloped area and in 6 years of periodic trips from headquarters created a thriving area able to support a full-time worker

National Camp Director

- Assisted camps in developing standards; visited and evaluated camps
- Articulated and wrote camping philosophy and manual of administration which became influential in Christian camping
- Directed one- and two-week camps in various locations (more than 20)

Program Director

- Responsible for complete revision of program, including revision of handbooks for leaders and girls
- Supervised staff of 23, including in-house and freelance writers, and a division that launched a national magazine.

It was at this point that I sensed the professional need for further education in cross-cultural studies; this coincided with a personal need to grow beyond my confined background, and I enrolled in a PhD program in Sociology at the University of Chicago. Shortly thereafter, I entered therapy, resigned from Pioneer Girls, and met and married Don Schatz. Two months after our wedding, I received an MA in Sociology from the University.

For two years I worked as Conference Coordinator for Urban Research Corporation in Chicago, designing and conducting national conferences on current topics of interest: Minority Economic Enterprise, Tenants Rights, Educational Technology, Industry-related Day Care.

Meanwhile Don and I had joined together our concerns for 60s issues by teaching Sunday School in the predominantly black First Presbyterian Church in Woodlawn in Chicago, helping start an interracial church in integrated Hyde Park, and finally by establishing—along with others—the Urban Life Center, which we eventually directed.

The Urban Life Center was conceived as an alternative educational experience for Christian college students who wished firsthand experience within the urban environment as part of their college program. We established connections with 10 midwestern Christian colleges, and recruited 10 students a term to come live in Chicago and learn together. Three elements of the program were focal:

1. Cooperative group living in a residence located in a predominantly black area of integrated Hyde Park
2. Self-directed learning—a process whereby students were taught to take charge of their learning, write their own learning goals and contract, and evaluate their performance according to criteria they learned to develop.
3. Field experience. Each student obtained (with assistance) a semester-long field placement related to his or her goals and interests, where they received hands-on experience with urban issues and realities.

Because this experiment in education was a holistic one, we became involved in a good deal of one-to-one counseling, frequent group meetings of a sensitive nature, and much informal contact. Two consequences of this for me were:

1. I completed a year-long training program for Group Facilitators at Oasis Center for Human Potential
2. I educated myself in Career Development and Skill Assessment techniques, and ran a series of workshops in addition to do a lot of individual career counseling.

The Move to Boston

Was part of a major mid-career change for both Don and me. For different reasons, we both were propelled to make a move—first *from* the Urban Life Center, and then from Chicago. We came *to* Boston, unsure of future direction.

For the past year, I have been a Counselor at West Suburban YWCA's Women Resource Center in Framingham, preparing CETA-eligible women to seek and obtain employment. I have also taught courses in Self Assessment and Career Development at Northeastern University for 3 quarters. In my spare time, I have been writing—articles and a book.

Don's and my long-range goal has been to find a setting in which we could work together—since that is our preferred life style; and one that would enable us to exercise our Christian faith and commitment wholeheartedly. We expect Many Mansions to be such a setting, and one that will nurture our spiritual selves above all else. This we take on faith.

Thinking Process in Accepting a Position

Why am I taking this job?

Because it was offered to me (I am "called")—as opposed to pursuing a rational job search, using learned techniques. The receptive mode, not the proprioceptive mode.

Because I can work beside Don.

Because I love, trust, respect, value Dick and Richard.

Because I am trusted "without reservation."

Because I am going to be able to be in on "beginnings".

Because the work is something to wholeheartedly "believe in"—its Christian base.

Because it is in Boston (tired of commuting). I am committed to the city.

Because it involves caring about the poor.

Because it involves adult education.

Because I am needed there—in practical ways—and a large number of my skills are useful.

Because I can learn from Dick's style of leadership spiritually.

Why I should hesitate:

But

I don't know what I a getting into

I trust the people here.

I don't know precisely my job definition
or description

It may be "too Christian"—too small a
world, shut up to itself.

I will check with Dick about my fears.

I may get bogged down with administrative
detail or feel pressure to get involved
at that level.

I have the sense and assertiveness to
control my job so it doesn't bog down

I am happy at Womens' Resource Center

I will leave WRC eventually to work in
Boston, and this timing has some
things in its favor.

I am not finished there.

I can try to pave the way for the
Internship program.

Women/staff there "need" me. I have
not seen all my 50 women placed
yet.

I will ask Dick and Pat if I can give some
volunteer time to WRC during July and
August

Guidelines for Developing a Job Description for Eunice at Many Mansions

Overarching Considerations: Focus on initiation of projects, then assimilating the idea into the structure and delegate to others where possible, and over time (often a long time)

Ideas . . . Vision . . . Philosophy . . . Long Range Planning

1. Be involved in conversations with other staff regarding future possibilities at MM.
2. Help evaluate ongoing direction in the light of stated objectives.
3. Clarify objectives and philosophy and crystallize these in writing for various audiences.
4. Make long range plans and develop step-by-step activities to achieve goals.
5. Develop budgets to fit planning.
6. Train/imbue new persons (including volunteers) with philosophy—just through contact.
7. Assist in development of funding proposals if appropriate.

Teaching . . . Counseling . . . Group Facilitation . . . Program Development

1. Develop— with others—program for The Academy, based on research of needs and resources in Boston.
2. Use teaching/counseling/group facilitation skills within the Academy in specific programs (i.e., teach courses, develop career counseling component, lead groups, if there is need)
3. Work with Dick on staff development, including interns and volunteers (helping staff to grow within their responsibilities, and their potential to be fully used). Be a resource in the area of group process skills

Administrative . . . Clerical . . . Communications

1. Set up/collate directory of resources for referral and cooperative efforts (using already-developed materials)
2. Work on any aspect of publications—newsletter, brochure, curriculum descriptions, menus, flyers, as needed.
3. Develop resource file/library.
4. Assist in systematizing office routines as needed.
5. Develop volunteer/intern setup in such a way that such persons can be used effectively.
6. Consult with staff on creating a workable and aesthetic physical environment, as needed.

Guidelines for Developing a Place for Don Schatz at Many Mansions

Ultimate Career Goal at MM; Poet-in-Residence of the Academy

1. Read Poetry.
2. Develop a poetry group along the lines of MM's philosophy.
3. Teach Poetry course, and courses in the Arts generally.
4. Give meditations/sermons as appropriate.
5. Participate in group discussions on issues: challenge viewpoints.

Immediate Role: Staff Associate

1. Help Richard in the restaurant:
 - (a) Do practical tasks (dishes)
 - (b) Encourage personal relations among the help
2. Help Dick:
 - (a) Consult with him as resource person, participate in group planning sessions
 - (b) Greet visitors/volunteers, make them feel welcome, orient them to MM, be with people in helpful, meaningful ways—a form of counseling.
 - (c) Explore the idea of community.
 - (d) Explore the relationship of the Mennonite non-violent perspective to MM.
3. Help Eunice
 - (a) Co-teach
 - (b) Assist in other ways as there is need

3. 1985 – Mid-Career Check & Re-assessment

Five years later, I went a little deeper, taking on a process that expanded to include life goals. I was 55 at the time and thinking long-range

1. The assignment was to take two minutes to write down your life goals as quickly as possible.
2. Then do it again—thinking New!
3. Finally, put the two lists together, prioritizing and amalgamating them.

The Quick List:

Life Goals

- To have a house.
- To have a retreat center, a place for people to be still and grow.
- To go to South Africa and experience that tension and “edge”
- To pare down possessions to give away.
- To see Mother out of this life with grace.
- To not have to struggle to survive.
- To fund worthy causes.
- To adopt a cooking style that helps solve our nutritional needs and tendency to overeat.
- To get over sugar craving.
- To act.
- To preach.
- To have a strong spiritual friendship with a woman.
- To be able to work in clay again fairly easily without going all over town and paying lots of money.
- To write my story compellingly.
- To have a regular outlet for writing.
- To be able to express the wisdom I have in terse pungent prose that connects with others’ experience.
- To live up to my potential spiritually.
- To be able to be more active physically.
- To get over my asthma without losing the values of the experience.

(This exercise took me 11 minutes.)

The Second List:

For the next Six Months:

Carry the burden of Mother lightly.

For Legacy:

Write my life story.

Give/throw things away.

Be with wise men/women of God.

Next Three years:

Find way for others to carry on part of our vision for helping folks follow Jesus more radically, living in and not of the world. Might this be a house? A community? A place of quiet? A “Poustinia”?

General:

- Decide for poverty.
- Decide about ritual.
- Do a house—place—ecumenical—that provides quiet, prayer, simplicity, and physical, spiritual and emotional nourishment. Decide in or out of the city. Have a place to go too for rest—maybe someone else own and manage, but have a relationship.
- Consider working in: clay, wood, fabric—quilt, weaving
- Write
- Preach/speak
- Read
- Attend reunions (Pioneer Girls, Wheaton, Urban Life Center, Life/Work Direction)
- Have niece Jane and Bob and family visit a farm-like place for a month
- Become as a child
- Allow for unself-conscious earthiness, lying in the Son /sun.

Initial Amalgamation of Two Lists:

Lifestyle—Quality of Life

Space: shared with younger people—

- for questioning,
- for launching – transitions, for rest/love

Simplicity/moderation/nourishment/beauty—

- texture, color, taste, smell

Creativity

- things—clay, wood, fabric and words—write, speak, read

New Three-Year List # 1

Life/Work Direction:

- Take a turn of some sort toward a center for folks who want to change their life direction and need encouragement and help.
- Reach out to this audience and get some help in this, involving “lay participation”

Get spiritual direction/therapy/input in order to keep growing objectively, creatively

- Workshops? Seminars? Weekends? Classes? Retreats? Whatever?

Creativity in Clay/Fabric/Wood

- Involve myself in some way in craft-type activity.

Prayer:

- for others? With others?
- Solve this dilemma in some way.
- Underscore this aspect of ministry.

Time

- Assess work commitments and financial needs and energy capacity and develop schedule that meets all three needs.

Personal and Home

- Go away with Don regularly.
- Take time off regularly.
- Continue to objectify relationship with Mother to make her last years maximally fruitful.
- Cook less perfect meals; get simple; cut down on sugar.

Three-Year List #2

- Teach.
- Do spiritual direction.
- Preach/Speak
- Learn—Workshops, classes, seminars, therapy.
- Get away often with Don, and alone—regularly.
- Bring to some sort of completion the work I am doing with regard to Mother, so it is emotionally and spiritually fruitful and healthy.
- Move Life/Work Direction to an even deeper place spiritually whatever that entails.
- Go to a hurting part of the world, and experience that.
- Experience history and art—Europe?
- Work in clay and fabric.
- Be led by Jesus in little things.

Amalgamation of Three-Year Lists #1 and 2

Work

- Deepen and change, with the help of others
Do Evaluation

Mother

- Objectify
- Make it fruitful
Therapy
Get away often

Learn and Receive

- Attend my own creative/objective growth by whatever means—therapy, direction, seminars, classes, reading
Pick up spiritual direction again
Read books of mystics

Teach – Expression

- Speak
- Provide spiritual direction
- Teach
Find opportunities to give spiritual direction

Prayer

- Be led by Jesus in little things.
- Pray for others
Pay attention to promptings

Recreate regularly

- Alone
- With Don
Take off two days in April and May
Go to Chicago in July.
Take vacation in August.

Sensate Experience

- Arts/ History
- Hurting parts of the world
- Clay, fabric
Trip to England
Sew a quilt.

4. Life Planning processes at the end of work life

In 2018, turning 88, I took a different tack in analyzing my gifts and goals. I knew I needed to disengage from major leadership and control in the work of Life/Work Direction. It required my sifting out all the things I had been doing that now needed someone to replace me, and then distill the ways in which I could still contribute, while yielding both responsibility and authority.

One first instinct was to take a wholistic look at the way I might have been seen in the work.

I am an encourager.

I do this as a questioner within these roles:

Facilitator = Ask “how can I help” move it forward, keep on schedule, make it go easier, make it effective or appealing, oil the machinery, remove barriers, keep track of in an orderly fashion, inject humor into

(physical and material logistics related to time and space – space prep, phone, door, supplies; provide support for elements of program needing attention such as parts of life-long learning elements not conducted on site)

Connector = Notice ways of connecting people and resources, ask questions to elicit possibilities, reach out and initiate to open up opportunity, see relationship to larger themes and culture.

(books and articles to season our offerings and provide context for initiatives and changes, raising good questions, suggesting networking contacts in community, and between participants)

Companion one-on-one = be available, invite, question

(relate to larger Spiritual Direction community, and companions to LWD’s mission as a whole—*Companions*, vocational and couples and retreat work)

Expressor = write, share, pose and encourage questions to elicit deeper context

(assist in written communication on many levels)

Presence = with the perspective of time (history) and space availability (community)

(provide perspective and nuance with appropriate sense of continuity)

Ask the good question

*Change in doing (task) always comes from
a change in seeing (perspective).*

We must go slowly; there is not much time.

I also prepared a detailed list to inform the organization of all the functions I had performed and that needed now to be taken on by others (following):

WHO I AM

I am Eunice. Eu- nike = Happy Victory.

I give enthusiasm—*en theos, in God*—encouragement, hope, optimism, the upbeat trust that as long as this work is of God, God will continue it in whatever form God chooses.

I Ask *WHY* Philosopher

I think philosophically about the nature of this enterprise and how it fits into the larger scheme of the Kingdom of God, and the times. This underlies my strong inclination toward conceptualization—providing a framework for decisions to implement ideas. It also propels my constant exploration of reading materials current in the culture, as well as works of historical importance—so that my/our thinking can be rooted in something larger than would otherwise exist. I honor the memory of the beginnings of this work, thereby seeing the confluence of events and ideas flowing together in the river of time. My areas of interest include psychology, contemplative spirituality, sociology, history, and through Don—the arts.

I also ask this question—Why?—of others who propose future direction, changes in what we do now, and of interpretations of the history.

I can hold onto principles over time, expanding my reasons for defending them. I need strong counterparts who can help me look from another point of viewing, and when this happens, I get equally excited about this and see how the larger framework leaves space for this very different take.

I Ask *WHAT, WHEN, WHERE* Executer

I have ideas about specific matters and can propose solutions and responses to challenges, am more apt to ask “Why not?” than “Why?”

I need input from others who look at situations quite differently, because I have strong beliefs and reasons for conclusions I have come to thoughtfully.

I can pick up these unique approaches, and weave them into the larger pattern without seeing any disconnect.

I Ask *HOW* Analyst - Writer

I constantly analyze from the standpoint of the larger picture of What, Where and When—in order to come up with a conceptual basis (Why) to guide the general forward direction, as opposed to specifics. I have a lot of flexibility about all of these, provided the directional purpose is clear and can be achieved.

This tendency toward analysis precipitates my writing papers that can be circulated and discussed as a basis for getting input from others. Although I like having others read and comment on these longer writings, they feed me sufficiently to satisfy me and simply act as further ramification for actions I and others decide to take. I like to see the WHOLE—and that it can HOLD diversity.

I Ask *WHO*

As Counselor

In general, in personal relations—I basically am most comfortable in formal roles, along with appreciating a few confidants where there is openness, freedom, and deep honesty.

I focus on the needs of the persons whom I serve as Spiritual Companion and constantly appraise that work in light of what God is teaching me to receive as I give to others. I feel equal to those I serve in this way.

I like to be present in our intakes of new persons. Scott is responsible for preparing an intake notebook and obtaining all contact information on the participant card.

I thrive on seeing that first introduction to the work—and the way the three of us participate in unveiling our process just through the way we relate in that conversation. I feel free to enter boldly, ask questions from the beginning and all the way through, interweaving with the other staff, and feel a connection with the new potential participant that will support later contacts at the front door. I feel a responsibility for answering the front doorbell when participants arrive early and Walkers are not yet on duty downstairs. I also feel a responsibility to pray for each person as he/she comes to mind.

(Just as I was writing these lines early before 8 a.m., the doorbell rang. It was twelve minutes before the hour, and in came the person due to see Louise. So I hopped up, let her in, set her up with tea and then went into the work space and discovered it needed to be set up for a one-on-one, so folded the table back. She came into the space and we had a delightful conversation until Louise arrived. I am grateful for these natural opportunities to engage which combine a role—greeter—with casual appropriate connection.)

As Communicator

I have been led to see that there needs to be a healthy harmony between seeing each day as a team working together to create a flow of the day—and of the ongoing life of the work from beginning to end—who is coming, what needs to get attended to. That means each of us being attuned to the pulse of the day individually, and as a concerted threesome. This underlying sensibility—our calling under God—requires that we transform the existential moment aligned with that purpose. So we do not regard the doorbell signaling the arrival of a person as an “interruption” to conversations and other tasks, but a signal to reclaim our calling.

My need and desire to seek connection with staff and board through fairly detailed and constant communication—in person, in writing—emails and documents needs to be part of the flow and not an interruption of the flow of our central tasks in direct contact with participants. My need for and appreciation of response is key—and perhaps limiting.

To produce continuing communication, the existence of a reliably scheduled regular staff meeting is a key concern of mine. I prepare for this, appreciate others’ equal care in preparing and making time for this, and the way each meeting is conducted prayerfully and with a healthy dose of levity.

I feel a continuing concern for the work load and time pressures on other staff, and look for ways to alleviate that burden, including gifts of extra batches of food I have cooked. I am not an especially astute reader of their needs, but I faithfully try.

I want others to follow my lead; I am not especially gifted in less formal leadership roles. I am unfailingly grateful for the ease with which other staff function in informal situations and compensate for my awkwardness.

I am quick to respond to practical needs when clearly asked of me.

I am articulate in situations where I am asked to present reasons for actions, history of experience and evolution of my/our thinking about a subject.

WHAT I DO

FINANCIAL TASKS

Daily Receivables

1. Check or cash arrive in person or by mail (Scott/Louise mark check by account.)
2. Record on participant/donor card (Scott and Louise)
3. Record in ledger, with identification (**V**- vocational Process, **I**-Individual Work, **C**- Couples Work, **T**-Threshold, **R**-Retreat, **D**-Discovery Weekend, **O**-Other event, or **Don** – for donation.
4. When there are 18 entries, copy donor checks. For one-time donors, enter amount on receipt form, address a receipt envelope and stamp it, and place unsealed envelope in designated place on Scott's desk for a personal note to be added.
5. Take picture of all checks (plus cash) and send to bookkeeper for entry into QB.
6. After bookkeeper has entered the deposit, go on QB and print deposit (2 copies), attaching one to bank deposit form, which you will fill out.
7. Take deposit to bank, attach bank deposit to second copy of QB deposit form and place in paper file.

Monthly Receivables (electronic)

1. Vanco: Bookkeeper receives e-mail notification of payments and records them in QB according to her schedule. On site, a person needs to transfer payments to the the special card file set aside for "pledgers".
2. PayPal: Bookkeeper waits until after the 20th of the month (often on the 25th) and goes online and withdraws the amount accumulated and records it in QB. On site, a person transfers the information on each donor's gift and fees deducted both in the ledger and on pledgers' cards in that special file.

Monthly — regular and special—Payables

1. All regular bills (some recurrent) are kept in a folder and pictures of them are taken and sent to the bookkeeper who records them as received. With Vanco, the

- bill for financial services comes in a single bill monthly. With PayPal, financial service charges are included with the list of receivables recorded on the 25th. The payment to the Program Assistant is a regular payment, coordinated with a person on site as to check number and date paid—if possible also on the 25th. The bookkeeper submits her own bill on the 25th for services rendered, and coordinates that with person on site for check number and date.
2. All regular salary payables are paid on the 25th. The bookkeeper contacts the IRS by phone and transmits payment of FICA, Medicare, and withholding amounts including the tax share required of Life/Work Direction. She directs a person on site to issue checks, communicating together on the date and numbers of the checks.
 3. Special payables are handled as needed, first on site, with invoice picture sent to bookkeeper along with check number and date. Bookkeeper records this in QB.

Quarterly Tasks

The 941 Employer's Tax Return is filled out by the bookkeeper after the 25th of the month ending each quarter. A copy of this form is provided for the file on site.

Annual Tasks for Bookkeeper and/or Treasurer and Onsite Staff:

January or February: Treasurer will transfer SEP contribution to Mutual of America, as decided by the board for the year. This can be done on MOA Hotline Plus. Treasurer will notify bookkeeper who will record it on QB. Although this contribution is based on the previous year's salary level as far as IRS is concerned, the amount itself comes from the present year's budget.

Spring of the year by May: Form 990EZ (form to be used until revenues rise to \$200,000 annually when we must file regular Form 990) is prepared by the bookkeeper and presented to the Treasurer of the Board, and to staff on site for discussion and entering program information required. Accountant is asked to ensure this document properly accounts for our status and activities to be in accord with applicable laws, and advises us as necessary. Treasurer sees that this form is filed with appropriate IRS office.

October: File State report to the Secretary of the Commonwealth, along with the \$15 fee as a non-profit in Massachusetts.

2018: Renew tax-exemption status with Massachusetts department in charge.

OFFICE TASKS

Weekly

Time tally sheets of staff are filed and periodically reviewed to evaluate our use of time and suggest changes to facilitate maximum effectiveness.

Weekly calendar information is tabulated in a ledger sheet in the file. New calendar put up, and if needed, a new copy of the form is made from the original in the file.

Check on the checkbook, the QB "register" and the "Summary" of our bank account online at EBSB—to make sure everything "corresponds" and is in synch, and prevents problems in end-of-month reconciling.

Monthly

Treasurer or person on site should Reconcile account on QB. This is not done by bookkeeper for the sake of separation of accountability and good oversight.

Seasonally

Check supply cupboards in work room to be aware of space and/or supply needs or to rearrange for convenience.

In January, remove from lower drawer in center of closet one box of financial records from seven years ago and replace with last year's box. Records are kept for 7 years.

Check file of vocational process participants, adding folders for past year after sifting them , reducing bulk.

JANITORIAL TASKS (Eunice and Don, also tenants)

Daily

Start the day by assessing the pattern of the day's flow, aware of weather outside, and temperature inside and what needs attention (do all this with Don):

Set up work room area, putting lights on, and at night extinguishing any still on.

Heat water in tea kettle in front hall.

Keep cups washed in HOT water to be sterile.

Keep clean spoons available on tea table.

Be sure temperature is at the right level—in summer, check air conditioner.

Weekly

Vacuum work space.

Tend and water plants.

Provide variety of tea packets.

Check honey and sugar containers to be sure they are clean and filled.

Provide bottled water in refrigerator.

Monthly

Hire and pay cleaner (from personal funds) to do thorough cleaning of entire work area, including front hallway.

Seasonally

Help with the shift to and from air conditioning (curtain length pinned up and let down)

OTHER MATTERS NEEDING CARE AND UNASSIGNED

The Library and Books

A log is kept for books loaned out. There is no consistent tracking of this so there may be books out and not returned, or they may have brought them back and this was not marked on the sheet. Once every six months e-mails can be sent out to check on this. A system needs to be put in place to keep the list current and accurate.

Books are added to various shelves. There is a casual separation by type of resource each one represents, but this is not closely watched or managed.

The filing system—both its logic and its location, as well as determination of what can be saved and what can be tossed and when—requires an overhaul. It needs to be looked at from the standpoint of who uses it, and how often, as well as to how it is stored (computer/paper).

--Parts needing special attention relating to numbers and names:

1. Mailing list of postal addresses
2. E-mail list of quarterly update subscribers
3. E-mail list in general
4. Tally of sessions by week
5. Tally of attendance of Vocational Process participants
6. How we track Individual Work participants—these get lost.

--Matters pertaining to Participants:

1. Participant folders—in Vocational Process, Individual Work, Couples
2. Testimonials and other correspondence

--Matters pertaining to program content and resources:

1. Curriculum materials—current and past for Threshold, Voc. Process, Couples
2. Resources and Ideas

--Matters pertaining to Organizational Matters

1. Board meeting minutes
2. Board conversations and correspondence
3. By-laws, tax-exemption, insurance