

**Joint Report to the  
Illinois Conference Annual Meeting – Fall 2024**

**Finance, Administration, and Business (FAB) Committee, & Treasurer**

While we continue to build on the financial processes implemented over the past several years, the turnover of our Conference Minister, Financial Manager, and Support Staff for Operations (SSO) has necessitated that we rebuild our financial team. Our new Financial Managers and SSO came aboard this summer and are making progress. Meanwhile, the FAB Chair and Treasurer provided a list of Goals and Objectives for 2024. The vast majority of these are complete or being completed by FAB:

- 1. HIRE OUR NEW FINANCIAL MANAGER.** We transitioned from Keith Clark-Hoyos' organization to Jitasa over the summer. Keith and Zulima left our Conference finances in good shape and continue to assist us occasionally when questions arise. Now, we are meeting weekly with Jitasa to work through their initial financial reports.
- 2. ENSURE A PEACEFUL TRANSITION TO A NEW FAB CHAIR AND TREASURER.** Bob Poor and Cristine Vesely are transitioning out of their positions with the Conference and are working hard with our Financial Team and Staff to ensure a smooth turnover. Additionally, both Bob and Cristine will remain available to advise as topics and tasks arise among the new staff, Treasurer and FAB personnel.
- 3. TRANSITION FROM ACS ACCOUNTING SOFTWARE TO QUICKBOOKS.** This task was completed at the beginning of 2024, ensuring the Conference's books can be managed by a common, industry-standard software package.
- 4. UPDATE OUR FINANCIAL POLICIES & PROCEDURES HANDBOOK.** While the handbook will likely always be a work in progress, we have added new sections on End of Year Financial Gifts (for Staff), a Large Gift Acceptance Policy, and an Information Technology Hardware Refresh Policy. Next, we anticipate the new Financial Team to review and document a staff spending policy.
- 5. INTEGRATE AN OCWM WELLNESS SUMMARY INTO FAB MEETINGS.** Done.
- 6. IMPROVE CONFERENCE CREDIT CARD RECONCILIATION.** This effort remains a work in progress. We continue to explore how to improve our Credit Card procedures.
- 7. INTEGRATE A SCHEDULE/CALENDAR INTO OUR FINANCIAL HANDBOOK.** We postponed this effort while we continue to get our new financial team up to speed.
- 8. CLARIFY THE FINANCIAL WAY AHEAD FOR TPIRC.** With the arrival of the Lilly Grant TPIRC 2.0 funds, the finances for TPIRC are available for years to come.

As we look back on 2024, we feel blessed to have made it through so many organizational and personal challenges, while leaving the Conference in much cleaner and better financial shape than when we began.

Blessings,

Bob Poor  
FAB Chair

Cristine Vesely  
Treasurer