Date:   June 12, 2024  
To: UMRA Board Officers  
From: Eric Hockert, UMRA President

Jerry Rinehart, Co-Chair, UMRA Organizational Continuity Committee (OCC)  
Re: **Toolkit Overview**

**Toolkits**—The toolkits are a collection of materials designed to help you or your successor carry out the duties of your position, such as a "How to" guide, a seasonal calendar of tasks, an email template, or a workflow document. These documents are updated annually with the most recent (top) document listed first. When updating toolkit documentation, please include all relevant tools from past toolkits, even if you didn't personally use them. Do not carry forward outdated items.

Consider including the following items:

* Organization Name and Current Leader/Chair/Facilitator
* Number/frequency of meetings and/or organizational activities
* Dates/time frames for meetings; key items to put on calendar; seasonal activities
* Workflow documents on specific organizational tasks/responsibilities
* How are new members solicited? What is helpful in orienting them to the area?
* What are typical communication activities used to publicize events internally or to UMRA overall? (Sample or typical messages sent)
* Templates for other regularly needed emails and communications
* Tips on maintaining membership data base/information
* Roster of current members

This compilation should be submitted as one document, not multiple.

The following is the suggested header format for use in creating your toolkit (and all documents). It must include date, topic, who is receiving it, your name and position.

Date: [date]

To: Cathy Lee Gierke, OCC Co-Chair,

Julia Wallace, UMRA Archivist

From: [Name, Title in UMRA]

Re: 2023-24 [position/committee name] Toolkit

[body of toolkit here]