U.S. GRAIL REPORT TO GRAIL NATIONAL COUNCIL

Date: 3/15/2023 Report Compiled by: Terrie Puckett

UPDATES: The Grail

- ED Health Update—Surgery went well; recovery is on schedule. Started working from home part days the week after surgery, and am working from the office ½ days and home ½ days at this time. Doctor follow-up 4/24 where I hope to a) be allowed to drive and b) be allowed to start using my arm. This means back to office full days. (yay!)
- RMM Review—I was scheduled to go to Cornwall to check on the property and meet with RMM about the lease renewal process. Because I was unable to travel unexpectedly, NLT went in my stead. Thanh got Covid so Sharon and Judi spent a day in CW. Their report on that visit is included in the Council packet.
- Financials—(Finance Cte has reviewed Jan and Feb but not yet March, so Feb Financials are in your packet). As of DRAFT March financials The Grail is $21k+ (31%) better than budget, however the cash flow is non-existent. Normally we count on member donations at the beginning of the year (when we send out the member giving forms) to carry cash flow until summer. However, only 43 returned the forms with a total of $15,030.00 to the US Grail in 2023. Here is the breakdown of donations:
    - 26 made 1 time donations in 1Q for a total of $8,500.00 (so "cash in hand")
    - 6 who pledge to give 1 time at a later date for a total of $620.00 (pledge)
    - 11 who pledge to give a total of $5,910.00 in multiple payments over the course of the year (mix of cash in hand and pledge depending on their payment schedule)
- Financials II—based on the member-giving forms, we can plan on reaching only 1/3 of the budgeted member giving amount of $45,000. This means that we will be drawing on the Grail General Fund sooner than usual and for a greater amount than in past years. Finance Cte recommends a transfer of $45,000 from General Fund to National Checking to cover 2Q expenses.
- Community—The Grail is a sponsor for the upcoming Heroines of Our History event (April 29) at Heritage Village. We will have a booth sharing info about The Grail, Crew, and the social justice platform policies.

UPDATES: Cornwall

- Please see the assessment report prepared by Judith and Sharon from their daytrip
- The kitchen renovation required by the fire inspection has been completed

UPDATES: Loveland

- Fencing—Installed. Will track any issues over next 3 months. So far 1 issue reported (old fire escape ladder was propped against the fence—we removed it ASAP), and the fencing survived the massive windstorms!
- Major Maintenance—working with our contractor on scheduling the work to be done at Grailville over the next few months
- Cameras—the cameras we purchased after the break in have been up and running. In the last 3 months, no further issues on north side. We have been able to use these to also track general use by the public over the weekends, however we will be starting a short "survey" project to better collect/share information. Beginning in May we will have 2 folks posted on the P driveway to stop cars as they come in to greet the guests, and—following a script—ask how often they use the space, for what purpose, what they know about The Grail, and to ask if they would like to join our Friends od Newsletter. Ideally we will have Grail members volunteering

for this, but we can also partner Grail members with Crew members (we want 2 people per shift).

- Art—Stations of the Cross exhibit opening was successful—the artist and organizers very pleased with turnout. Most folks attending were new to The Grail.
- Warren County—as noted previously, the ATP program is on hold as the county changed how youth offenders are sentenced—so no girls currently in the program. However, the partnership with the community service department is going well. In addition, we are starting to host some of the boys who are incarcerated for outings at The Grail. No sessions, but they do activities on the property which gets them out of the detention center.
- Crew—Applications are out, and we have expanded our partnership to include Clermont County Ohio Means Jobs program. CCOMJ receives funding from same source as Easter Seals and serves same group, in slightly different ways so once again, we will be able to move Crew to serve participants from marginalized (especially economic barriers) communities.

Decisions Needed:

1. Approve the $45,000 as recommended by Finance Cte.