

AMTA Work Session
September 25, 2025
7:30pm ET

Present: Angie Snell, Leslie Henry, Jennifer Sokira, Mia Krings, Alison Deran, Kendall Joplin, Chelsea Mabes, Lori Gooding, Peter Bendoris (Newpoint Advisors Co.), Megan McCausland, Becky Engen, Nicole Bowen, Leigh Ann Foor, and Jeff Angell.

Guests: Pamela Gray (SB & Co.), Kaye (Arrow Bookkeeping)

7:30 pm ET

Check In/Call to Order

Angie Snell

- Meeting called to order / introductions
- Board approved the agenda by consensus

7:35 pm ET

Audit Report

Pamela Gray, Partner, SB & Co.,

Kaye, Arrow Bookkeeping

Presentation

- Financial Statements
- Preparation of Form 990
- Recommendations and observations
- Emphasis - financial viability
 - “Slight negative without donor restrictions”
 - Restrictive funds used for other purposes
- Assessment of Control Environment
- Evaluation of Key Processes
 - Suggested improvements: payroll, offer letters should contain base salary and details of any bonus or incentives offered for the year
- Prior year recommendations
 - Financial viability
 - Safeguarding of assets
 - Credit card access

- AMTA must verify financial statements are accurate
- Improvement in cash assets, paying down of credit
- Rating will improve on Charity Navigator as a result of these findings
- Overall: clean audit

Move to: approve the 2024 Audit Report as presented by Pam Gray from SB and Company. Approved by Consensus.

8:10 pm ET Symposium Update Angie Snell

- Successful 2025 Symposium
- Registration remains open through February 2026 for the recordings
- Advertising post-Symposium will continue

8:13 pm ET 2024 Workforce Survey Update Angie Snell

- Almost ready to roll out, adjusting last bit of language
- Want as many MTs as possible to take

8:16 pm ET Ethics Board Angie Snell / Jennifer Sokira

- Board review of draft Ethics Survey; Purpose is to gather needs of the MT community as Ethics Board prepares for regional presentations
- Discussed process to add statement on the website to clarify Ethics Board role

8:20 pm ET Vacancies Election Lori Gooding / Angie Snell

- Board accepts slate of candidates:
Leslie Henry, President Elect 2025 Vacancy;
Brian Jantz, President Elect 2026-2027 term;
Marta Hernandez, Vice President-Elect 2026-2027 term
- Will send out bios, headshots, and video
- Need for Treasurer ASAP to ensure smooth transition

8:30 pm ET Board Continuity Planning Angie Snell

- Each current board member will outline the tasks and duties of their position this term, the timeline/dates when they occurred, and any suggestions they would like to share.

8:35 pm ET

President Updates

Angie Snell

- Secretary Angell is working with President Snell to update the minutes formatting and they are in the Board shared folder for review
- 2025 Fultz Award Review Committee's recommendation presented for Board approval.

MOTION: President Snell moved to approve the Fultz Award Review Committee's recommendation to award the 2025 Arthur Flagler Fultz Award to Drs. Amy Wilson and Stephanie Kolakowsky-Hayner for their research proposal titled Recovery through Intervention and Sound Engagement (RISE). Seconded and approved without dissent.

- Other AMTA Awards
 - Lifetime Achievement Award
 - Nominations and voting are submitted by the Board
 - Guidelines to be distributed to the Board
- CRTF Recommendations, reminder to re-read the CRTF Final Report & Recommendations
- Music Therapy programs are suffering and in some cases, closing
 - How can we support?
- How can we promote being a music therapist as a career? Future consideration for board
- Coalition Activities
 - Making sure our clients can get service, health insurance, academic trainings
 - Meeting on Monday, 9/29

9:07 pm ET

Other Business/Updates

Board Members

- Next Meetings, identifying availability
- Sharing positive updates

9:33 pm ET

Adjournment

Board Members