

# Unitarian Universalist Church of the Monterey Peninsula

Annual Report  
May 2024



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# Table of Contents

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## Agenda

Annual Meeting, May 5, 2024.....	1
----------------------------------	---

## Minutes

Annual Meeting, May 7, 2023.....	2
----------------------------------	---

## Nominations

Nominees for Membership on the Board of Trustees.....	4
---	---

Nominee for Membership on Nominating Committee .....	7
--	---

## Motions

Strategic Plan 2024-2027 .....	9
--------------------------------	---

Proposed Operating Budget 2024-2025 .....	12
---	----

## Staff Reports

Co-Ministers - Revs. Elaine Gehrmann and Axel Gehrmann .....	31
--	----

Church Administrator – Amy Razzak & Office Assistant – Karina Briseno .....	37
---	----

Director of Religious Exploration – Sharyn Routh .....	38
--	----

Music Director – Jorge Torrez.....	43
------------------------------------	----

## Leadership Reports

President, Board of Trustees – Mike Lovell .....	45
--	----

Program Council Moderator – Mibs McCarthy.....	46
--	----

## Financial Reports

Treasurer’s Report .....	47
--------------------------	----

Budget vs. Actual, Income & Expense Statement.....	49
--	----

Balance Sheet by Class.....	55
-----------------------------	----

## Committee Reports

Art .....	57
-----------	----

Buildings and Grounds.....	57
----------------------------	----

Caring Network .....	58
----------------------	----

Chalice Circles/Covenant Groups.....	59
--------------------------------------	----

Committee on Ministry.....	59
----------------------------	----

Communications .....	60
----------------------	----

Endowment.....	60
----------------	----

Family Ministry.....	61
----------------------	----

Finance .....	62
---------------	----

Intern.....	63
-------------	----

Membership.....	64
-----------------	----

Music.....	65
------------	----

Nominating/Leadership.....	65
----------------------------	----

Pastoral Associates .....	65
---------------------------	----

Service Auction.....	66
----------------------	----

Social Justice .....	67
Environmental Justice .....	68
COPA.....	69
Stewardship .....	72
Super Flea.....	73
Worship Associates Team .....	73
<b>Affinity Groups &amp; Special Interest Programs</b>	
Antiracism Book and Film Discussions.....	74
Buddhist Sangha.....	74
Men’s Breakfast Group .....	74
Soil Mates.....	75
Tai Chi Chih.....	75

# Agenda

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## UUCMP Annual Meeting

May 5, 2024 - 12 p.m.

1. Check In
2. Chalice Lighting, Revs. Axel & Elaine
3. Quorum call
4. Call to order, Mike Lovell, President
5. Agenda Review and Approval
6. President's Remarks, Mike Lovell
7. Motion on Voting Procedure
8. Approval of Minutes: Annual Meeting - May 7, 2023
9. Nominations and vote on Board membership & Nominating Committee

Nominees to fill Board positions:

- a. Katie Hamilton, Trustee (1-year term)
- b. Ray Krise, Trustee (3-year term)
- c. Ted Raabe, Trustee (3-year term)
- d. Celia Barberena, Trustee (3-year term)
- e. Mibs McCarthy, Program Council Moderator (2-year term)

Nominating Committee:

- a. Mike Lovell (3-year term)
10. Approval of Strategic Plan 2024-2027
11. Approval of Operating Budget for 2024-2025 fiscal year
12. Adjournment

# Minutes

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## **UUCMP Annual Meeting May 7, 2023**

In person and on zoom

**Chalice Lighting:** Revs. Axel & Elaine

**Quorum call:** Meeting attendees; UUCMP members in person and on Zoom, formed a quorum.

**Call to order:** Mike Lovell, President-Elect 12 PM

Members will be recognized by raised hands.

### **Agenda Review and Approval:**

**Motion:** It was moved to approve the agenda: it was so moved and seconded. APPROVED by acclamation.

### **President-Elect's Remarks, Mike Lovell:**

Mike introduced himself to the members. He and his wife, Rose, became members before the 2019 strategic plan had been enacted. He briefly discussed the funding issues at hand and noted that the annual report is available to all. It presents the issues as well as the wonderful work of the church. "The new year is a year of opportunity." He shared many of the opportunities.

### **Motion on Voting Procedure:**

**Motion:** It was moved that voting be by acclamation, with a show of hands: it was so moved and seconded. APPROVED by acclamation.

### **Approval of Minutes: Annual Meeting - May 1, 2022:**

**Motion:** It was moved to approve the minutes for the May 1, 2022 annual meeting: it was so moved and seconded. APPROVED by acclamation.

### **Nominations and vote on Board membership nominees to fill Board positions:**

- a. Warren Finch, Trustee (3-year term)
- b. Meredith Harrill, Trustee (3-year term)
- c. Robert Brunson, Treasurer (3-year term)

Nominating Committee:

a. Carol Greenstreet (3-year term)

All were recognized for their hard work and dedication.

**Motion:** It was moved to vote for the entire slate in one vote: it was so moved and seconded. APPROVED by acclamation.

**Approval of Operating Budget for 2023-2024 fiscal year:**

A discussion of the proposed budget was led by Robert Brunson. He discussed the categories in the budget as well as the use of the reserves.

Several questions from in person and zoom attendees were answered.

There were issues centering around the treasurer's two reports and Mike assured the members that both reports are available.

The attendees thanked Robert and his team for all their hard work.

**Motion:** It was moved to approve the budget for the 2023-2024 FY: it was so moved and seconded. APPROVED by acclamation.

**Chalice Extinguishing:** Rev Axel and Elaine

**Adjournment:**

**Motion:** It was moved to adjourn the meeting: it was so moved and seconded. APPROVED by acclamation.

**Meeting adjourned** at 12:48 PM

A further announcement was made about the Board's presentation of the newly created Carol Collin Exemplary Service Award to Carol Collin who has contributed boundless energy in support of our UUCMP community. The Board, on behalf of the congregation, presented Carol with a painting of her beloved dog, Sparky. The Board will also be placing a plaque in the church to commemorate the award. A reception was held in the foyer in honor of Carol.

Respectfully submitted by Kathleen Craig, Board of Trustees Secretary, on May 7, 2023

## Nominations

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### **Board of Trustees (one-year term)**

Katie Hamilton

I've been a member of UUCMP since early 2001 when my young family and I moved to Monterey from southern Utah. As I was raising my children (now ages 24 and 26) I had a strong desire to have the support of like-minded people—without needing to subscribe to any particular dogma. After visiting UUCMP a few times, I was thankful to have found the perfect fit.

Over the years I have been a member of the Committee of Family Ministry and helped as an OWL facilitator as well as with the teen youth-group. More recently, I participated as a member of the Worship Associates and later acted as the chair of the search committee for our sabbatical minister in 2021.

I have a passion for public libraries. I began working at the Monterey Public Library when I first moved to the area and continue to work there part-time. I enjoy quilting and sewing, spending time with my daughters, and traveling with my reluctant-to-travel husband.

### **Board of Trustees (three-year term)**

Ray Krise

I am originally from the New Jersey suburbs of Philadelphia and grew up about twenty-five minutes by car from downtown Philly. Having attended public schools, I went on to receive an A.B. from Middlebury College in Vermont (philosophy and religion), and a M.Div. from Union Theological Seminary in New York City. I worked for forty years on the business side of professional sports, holding executive positions with the Philadelphia 76ers, Philadelphia Phillies, Oakland Athletics, the Sacramento River Cats, Ticketmaster, and the Mazda Raceway at Laguna Seca. I have also served as ticket manager for the Athletic Department at the University of California, Berkeley.

From a religious family (two ordained ministers among my uncles), I was raised in a church of the American Baptist Convention and was briefly a member of the United Church of Christ. Joining UUCMP twelve years ago, I have served on the Finance Committee and been chair of the Worship Associates and co-chair of the Membership Committee. I was the chair of the most recent Ministerial Search Committee. I was a member of the Board of Trustees from 2016-2018 as Program Council Moderator. For the past five years I have served as Administrator for the Church. A huge music fan (eclectic), I enjoy creative writing and am an inveterate reader.

Unchurched for forty years, I am grateful to have found a religious home in our inclusive, values-oriented beloved community, as we support each other on our spiritual paths and work each day in support of our shared aspirations of love, hope and justice.

I am honored to be nominated to serve on the Board of Trustees.

### **Board of Trustees (three-year term)**

Ted Raabe

I did most of my growing up in mid-west Illinois until I was ten, and then in New Jersey until I was eighteen. I went to college in Brunswick, Maine at Bowdoin College majoring in Biology and Chemistry. I spent two years at the University of Minneapolis in a graduate program in Biochemistry. I arrived in California in September of 1977, lived in Napa Valley for two years and never looked back.

Most of my career was spent in the semiconductor processing industry in Silicon Valley which required extensive traveling. Both my Mother and Father were members of UUCMP from about 1990 until 2003. I move full time to the Monterey Peninsula in the summer of 2016, joining UUCMP at that time. At this time, I have the privilege to serve as the Chair of the Finance Committee at UUCMP. Additionally, I am a member of the church choir, a participant in Rev. Dennis Hamilton's Buddhist sangha, and hope to join Mary Kay's Tai Chi weekly program soon.

I am honored to be considered for membership on the Church Board of Trustees of the Unitarian Universalist Church of the Monterey Peninsula. With a deep commitment to the values and mission of our congregation, I bring 40+ years of experience in organizational management, managerial experience in sales and marketing, and financial management. Throughout my past career, I've demonstrated a dedication to stewardship, transparency, and collaborative decision-making. I am eager to leverage my skills and passion to serve our fellow trustees in guiding UUCMP towards continued growth, sustainability, and service to our members, and to our community.



### **Board of Trustees (three-year term)**

Celia Barberena

#### **Education:**

**Ph.D.** Educational Administration and Supervision, Bowling Green State University, Ohio;

**M.A.** Spanish Literature, Bowling Green State University

**B.S.** Economics, Sociology, Findlay University, Findlay, Ohio

#### **Professional Experience:**

**2012 - 2024** Engagement as a **volunteer or Board member** with organizations that improve the lives, health and educational advancement of the youth and adults of Monterey County. Current Member: UUCMP Worship Associate and Finance Committee Member; Pacific Grove Library Friends and Foundation Board of Directors; Blind and Visually Impaired Center Board of Directors; Pacific Grove Rotary Club leadership position as Speakers Coordinator; Community Foundation of the Monterey Peninsula Reader and Evaluator of Non-profit Grant Applications and Scholarship Applications. Prior Member: Coordinator of Volunteers Salinas Valley Memorial Hospital Medical Museum; Board of Directors member and later President of Chamber Music Monterey Bay; Palenke Arts Board of Directors Member (Seaside).

**2008 – 2012 President**, Chabot College (A California Community College) Hayward, CA - Chief Executive Officer for the college. Chabot College serves 10,000+ full time equivalent students and a head count of 15,000 students. The college operates with a budget of \$50 million.

**1996 – 2007 Vice-President, Student Services**, Hartnell College, (A California Community College) Salinas, CA

**1974-1996 Adjunct Faculty, Faculty, Director, Dean** at various higher educational institutions, non-profits agencies and California Community Colleges

### **Program Council Moderator (two-year term)**

Mibs McCarthy

Mibs joined UUCMP in 2003. She became active in the UU Legislative Ministry of CA (now the UU Justice Ministry of CA) working for marriage equality and the human right to affordable, clean water. She served as chair of the UUCMP Social Justice Committee and as secretary of the Board of Trustees, is a member of the Caring Network Steering Committee, the Leadership Committee, the Environmental Justice group, and the choir. She helped organize the annual Super Flea Rummage Sale for many years. She has also served as an usher and greeter for church services.

Mibs is a retired middle school science teacher, an elected delegate to the Monterey County Democratic Central Committee and is a board member of Carmel Valley Association, the Monterey County Chapter of the ACLU, and is treasurer of Public Water Now. She enjoys water aerobics and spending time with her husband, Joe, her friends, and her two cats.

### **Nominating Committee (three-year term)**

Mike Lovell

Mike and Rose Lovell joined the Unitarian Universalist Church of the Monterey Peninsula in October, 2020, during the pandemic. Even before joining the church, Mike had joined the choir and the Men's Breakfast group and Rose had joined the Membership Committee.

Mike grew up mostly in Texas as a Presbyterian. When he and Rose moved to Carrollton, Texas after their marriage in San Antonio, they joined a Methodist church (the more liberal one) in the area and were members there for 34 years. After church shopping in the Monterey area when moving here 5 years ago, they decided that the Unitarian Universalist Church was right for them and they have become even more involved since becoming members.

Shortly after joining, Mike was asked to serve on the Board of Trustees. Not having been a UU before or a member of this church very long, Mike wondered how much value he might add and whether he wanted to serve in that way. He became convinced that Board membership would work, and is now serving the last of his three year term, this year as President.

All three of Mike and Rose's grown children live in California now, and their two young grandsons live just minutes from them in the Marina area.

Mike says, "We are very grateful to live in a beautiful area, close to our family, and have a church home that we love."

## **Motions**

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Approval of Strategic Plan 2024-2027

Approval of the Operating Budget for 2024-2025 fiscal year

# UUCMP Strategic Plan 2024-2027



Our Strategic Plan focuses our energies in three areas, in order to:

1. Enhance and Enrich Religious Exploration for our Community
2. Improve Welcoming, Advertising, Outreach
3. Foster Connection & Involvement for Members



## 1. Enhance and Enrich Religious Exploration for our Community

Outcomes	Action Steps	Participants	Financial/Staff Resources	Start/End Date	Considerations/ Interested Individuals	Completion Benchmark
<b>1.1 Engage our children continuously across age groups</b>	Fortify our Children’s RE Program <b>Including:</b> - Increase number of RE classes - Promote adult volunteer involvement in RE	DRE, COFM	DRE & COFM	May 2024	- Develop/publish curricula or syllabi for all classes (Rebecca Irwin)	More classes, Curricula published, More volunteers
	Provide opportunities for multi-generational engagement <b>Including:</b> - promote parent/community awareness of RE - Focus/interact RE classes with Soc. Justice and Environ. Justice committees - Create more musical opportunities for youth involvement in services	DRE, COFM, MD, Social Justice Committee	DRE & COFM  LE Committee	May 2024	- Nature experiences for childrens and adults (Don Reynolds) - Childrens’ craft sales (Warren Finch) – Musical ideas (Wanda Sue Parrott) – Soc. & Env. Justice (Nan Foster, Amy Blondell)	More activities
<b>1.2: Improve our RE transition from children to Young Adults</b>	Build a learning “bridge” from children’s RE to young adult RE <b>Including:</b> - Develop adult/young adult RE opportunities for newcomers - Encourage church committees to engage our children	DRE, LE Committee, COFM, Program Council	DRE & COFM  Young Adult Group	May 2024	- Adult Opportunities for new comers (Celia Barberena) - Reestablish “coming of age” field trips -e.g. to Boston (Corey Brunson, Dennis Hamilton) - Children/ committees (Mary Kay Hamilton)	
<b>1.3: Reinvigorate and organize Adult Learning Experiences</b>	Expand RE for life-long learners <b>Including:</b> - Develop an integrated RE learning experience from pre-K thru adult - Restart LE Committee	DRE, COFM, MIN, LE Committee	LE Committee	May 2024	- Life long Learning (Robert Brunson, Corey Brunson) - Personal spiritual odysseys (Bob Sadler)	Reinvigorated LE

<b>2. Improve Welcoming, Advertising, Outreach</b>						
<b>Outcomes</b>	<b>Action Steps</b>	<b>Participants</b>	<b>Financial/Staff Resources</b>	<b>Start/End Date</b>	<b>Considerations/ Interested Individuals</b>	<b>Completion Benchmark</b>
<b>2.1: Improve our Welcoming environment</b>	Move to 2 services when the worship attendance dictates (average monthly in-person attendance over 100)	WAs, Membership Committee	MIN, DRE, MD - Increased staffing costs?		- Parking & Coffee Hour logistics - timing of services, choir, RE, zoom, etc.	
	Improve the Greeter experience <b>Including:</b> - Provide greeter training - Increase number of greeters/ ambassadors or floaters - Identify & utilize zoom greeters - Welcome all who come through the door	Membership Committee  -		May 2024	- Improved greeting (Nan Foster, Rose Lovell, Kathleen Craig, Dennis Hamilton, Mike Lovell, Meredith Harrill) - Try to match visitors with members (Be Astengo, Rose L., Lauren Keenan, Sharon Sadler, Carol Collin, Kathleen C.) - More explicit welcome for families, parents & children (Carol Greenstreet, Susan Holland)	
<b>2.2: Advertise more and better</b>	Improve signage <b>Including:</b> - Evaluate street sign effectiveness - Evaluate Bulletin board placement & effectiveness - Evaluate advertising options - Design & implement measurement methods	B&G Committee, Communications Committee	Advertising funds	May 2024	- Signage (Robert Brunson) - Advertising options (Kathleen Craig, Meredith Harrill)	
<b>2.3: Reach out to the community to connect and network</b>	Identify organizations to connect with (CSUMB, parents with children, LGBTQ+, Ohana, etc. Then reach out.	Communications Committee, COFM, Soc. Just., Inclusion TF	MIN, DRE		- Coordinate with RE (Don Reynolds) - LGBTQ+ (Amy Blondell) - Tabling (Konny Murray, Rebecca Irwin)	
	Train members how to present ourselves as Unitarian Universalists And specifically UUCMP to visitors, neighbors, or others (elevator speech)	Membership & LE Committees	MIN	May – Oct. 2024	(Susan Holland, Alora Daunt & Jon Letts)	

<b>3. Foster Connection &amp; Involvement for Members</b>						
<b>Outcomes</b>	<b>Action Steps</b>	<b>Participants</b>	<b>Financial/Staff Resources</b>	<b>Start/End Date</b>	<b>Considerations/ Interested Individuals</b>	<b>Completion Benchmark</b>
<b>3.1 Increase Opportunities for Social Connection</b>	Form a Social Committee <b>Including:</b> - Organize Circle Suppers - Monthly potluck & activities	Membership Committee, Social Committee		May 2024	(Be Astengo, Celia Barberena, Lauren Keenan) - Circle Suppers (Celia Barberena)	More social events
<b>3.2 Connect Old &amp; New Members</b>	Provide targeted opportunities for connection <b>Including:</b> - Encourage families to take new members under wing - Book discussions	Membership Committee	MIN	Sept. 2024		
	Better management of bulletin boards with group events/activities	Communications Committee	Admin staff	May 2024		
<b>3.3 Build Church Leadership</b>	Identify potential leaders <b>Including:</b> - Support work of Leadership Committee	Leadership Committee	MIN, UU Resources	May 2024	(Mary Kay Hamilton, Mibs McCarthy)	Active leadership committee
	Provide Leadership development opportunities <b>Including:</b> - Publicize regional and denominational workshops and conferences - Develop and implement "Pathway to Membership" - Identify and coordinate member "Talents, Experience, Interests"	Leadership Committee, Membership Committee, LE Committee	MIN	Sept. 2024	(Mary Kay Hamilton, Robert Brunson, Doris Beckman, Celia Barberena, Nan Foster) -County resources (Be Astengo) - offer groups about what it means to be UU - Congregational exchange - Visit other congregations	More leaders trained
<b>3.4 Increase Participation on Committees</b>	Publicize Committees and Their Activities <b>Including:</b> - Invite committees to offer Sunday "Committee Matters" & tabling - Encourage use of bulletin boards and posters posted - Offer regular work parties	Program Council	Program Council & Leadership, MIN, Admin staff	Sept. 2024	- Enhance and/or "distribute" Connections Fair, paragraph in newsletter, tables in welcome hall (Lauren Keenan, Don Reynolds)	More robust and diverse committees



**Unitarian Universalist Church of the Monterey Peninsula**

490 Aguajito Road  
Carmel, CA 93923-9400

**Date:** April 17, 2024  
**To:** The Congregation of UUCMP  
**From:** Robert Brunson, Treasurer  
Ted Raabe, Chair, Finance Committee  
**Subject:** Proposed Operating Budget for 2024-2025 Fiscal Year

The proposed operating budget for Unitarian Universalist Church of the Monterey Peninsula (UUCMP) for the upcoming 2024-2025 fiscal year is attached. This budget proposal was initially prepared by the Finance Committee and has been carefully reviewed and approved unanimously by the Board of Trustees, and they have recommended it be formally adopted by the congregation at the Annual Congregational Meeting on Sunday, May 5. This is a “balanced” budget that largely continues the church’s spending in support of the renewed energy and activity levels we are experiencing as we return to more normal operations following the COVID-19 pandemic and look to chart the promising future of our church.

The budget for the current fiscal year (2023-2024) included \$132,000 in excess operating reserve funding, and we’ve so far not used any of that allowance and may not need to this year. *The proposed operating budget is balanced without any allocation of excess operating reserve funds.* The lion’s share of the new budget is funded by the strong results of this spring’s “Be The Light” canvass, with pledged amounts jumping by 10% over last year – including 46 pledging units increasing their pledges by 25% or more (or committing to donating at least 5% of their income) – and almost \$50,000 in additional income raised through the special donor-funded pledge matching program. Overall, the congregation has committed to contribute more than \$475,000 to keep the church functioning in the coming year! A huge **Thank You!** to all who made a pledge or plan to make an operating fund donation to UUCMP!

*Special News:* A restricted donation of \$100,000 from a donor who wishes to remain anonymous allowed the church to avoid the substantial cuts we were facing in our staffing, including, most notably, retention of a full ministerial commitment at 1.5 full-time equivalents. Referred to as “Big Gift #3,” this generous donation is intended to supplement a portion of ministerial compensation funding for at least the next three years.

Overall, our church budgets, including the one proposed for 2024-2025, contain very little discretionary expenditure, which suggests we would not likely be able to cut our way through financial challenges, and reducing our activity, energy, visibility, and outreach would likely just result in a downward spiral:

- **Administration** expenses have grown by 5% over last year's budget (*a remarkable feat given the substantial recent upward pressure on prices!*) and now represent 20% of our operating expenses. *NOTE:* This includes a \$20,000 allocation for tree remediation and other contingencies during the upcoming fiscal year.
- **Programs & Committees** allocations make up 12% of our budgeted expenses (*over a third of which is our annual contribution to the UUA Annual Program Fund*) and are 9.4% less than was budgeted last year.
- **Employee Compensation & Benefits** represents 68% of our expense budget again this year and dropped by 1.2% from last year's budgeted amount, despite a 3% across the board cost-of-living increase and due at least in part to a change to a more competitively priced medical insurance provider.

Both of us are available to discuss any of these budget topics at your convenience! Along with members of the church's Board of Trustees and the Finance Committee, we will be holding *two* budget review and Q&A sessions (*identical agendas*) prior to the vote to approve the annual operating budget at the upcoming Annual Congregational Meeting: A hybrid in-person-and-via-Zoom meeting in the Sanctuary after church on **Sunday, April 28, at Noon**, and a second virtual-only session on **Thursday, May 2, at 7:00 p.m.** (Please see the *Weekly News* for the Zoom links.)

Thank you, all, for your dedication and support, financial and otherwise, to the Unitarian Universalist Church of the Monterey Peninsula and our important mission!



Congregation: One-Page Summary and Prior-Years Comparison

Proposed 2024-2025 Operating Budget

	2019-2020 Fiscal Year Actual	2020-2021 Fiscal Year Actual	2021-2022 Fiscal Year Actual	2022-2023 Fiscal Year Actual	2023-2024 Fiscal Year Budget	2024-2025 Fiscal Year Budget
<b>Income</b>						
41000 · Contribution Income	364,068	406,062	378,276	376,718	436,009	531,239
42000 · Investment Income	-	-	-	-	-	-
43000 · Fundraising Income	29,959	18,330	2,311	16,447	23,300	32,950
44000 · Endowment Disbursement	18,518	21,099	26,189	32,123	34,590	37,126
46000 · Facilities Donations	38,618	47,375	64,250	65,074	34,003	40,000
47000 · Miscellaneous Income	70	2,975	190	2,103	-	-
48000 · Other Income & Disbursements						
48200 · Reserve Funding Disbursements	6,253	8,000	5,000	93,000	-	-
48206 · Sabbatical Minister Fund Disbursement			15,000			
48207 · Operating Surplus Disbursement					132,000	-
48208 · Big Gift #3 Disbursement						39,488
48300 · Strategic Plan Support Funding Disbursement	83,329	74,791	83,333	83,333	28,539	-
<b>Total 48000 · Other Income &amp; Disbursements</b>	<b>89,582</b>	<b>82,791</b>	<b>103,333</b>	<b>176,333</b>	<b>160,539</b>	<b>39,488</b>
<b>Total Income</b>	<b>540,815</b>	<b>578,632</b>	<b>574,549</b>	<b>668,798</b>	<b>688,441</b>	<b>680,803</b>
<b>Expenses</b>						
<b>50000 · ADMINISTRATION</b>						
50500 · Bank Service Charges	199	61	247	90	50	60
50510 · E-Giving Service Charges	284	1,077	1,014	967	1,490	1,200
51000 · Communications	10,250	11,009	11,650	11,479	16,482	15,931
52000 · Postage & Shipping	1,026	748	1,032	593	635	987
53000 · Office Expense	9,701	12,859	7,146	7,212	9,781	8,777
54000 · Property Expense						
54100 · Facility Services	18,026	12,440	13,135	15,689	21,940	19,748
54200 · Maintenance/Repair	6,848	4,606	25,716	19,985	9,870	8,006
54299 · Property Systems / Taxes / Insurance	11,395	13,494	20,120	37,100	42,701	35,446
<b>Total 54000 · Property Expense</b>	<b>36,269</b>	<b>30,540</b>	<b>58,971</b>	<b>72,774</b>	<b>74,511</b>	<b>63,200</b>
55000 · Utilities Expense	12,223	9,640	12,147	13,946	14,791	12,356
57000 · Professional Fees	9,000	15,661	9,672	10,553	10,304	11,878
58000 · Contingencies, Miscellaneous, & Capital Reserve	-	59	20	93,439	-	20,000
<b>Total 50000 · ADMINISTRATION</b>	<b>78,952</b>	<b>81,654</b>	<b>101,899</b>	<b>211,053</b>	<b>128,044</b>	<b>134,389</b>
<b>60000 · PROGRAMS/COMMITTEES</b>						
60100 · Communications	1,797	2,755	1,094	869	3,500	3,500
60201 · UUA Annual Program Fund Support	22,777	25,054	27,100	28,596	28,714	28,471
60300 · Leadership Development	1,290	5,320	5,250	5,000	7,000	5,000
61000 · Lifelong Learning						
61100 · Life Enrichment	140	191	-	-	180	665
61300 · Religious Exploration	1,924	1,466	2,436	2,277	8,787	9,206
<b>Total 61000 · Lifelong Learning</b>	<b>2,064</b>	<b>1,657</b>	<b>2,436</b>	<b>2,277</b>	<b>8,967</b>	<b>9,871</b>
62000 · Congregational Life						
62100 · Membership	290	61	85	493	1,220	1,150
62300 · Caring Network	171	154	77	232	600	650
62400 · Building & Grounds	-	-	1,827	2,972	7,800	9,000
62500 · Events and Fellowship	1,745	369	1,012	797	4,157	4,157
<b>Total 62000 · Congregational Life</b>	<b>2,206</b>	<b>584</b>	<b>3,001</b>	<b>4,493</b>	<b>13,777</b>	<b>14,957</b>
63000 · Social Justice	5,507	7,050	6,550	12,200	7,500	3,700
64000 · Worship						
64100 · Music Programs	26,659	5,718	9,577	7,501	10,000	9,465
64200 · Worship Expenses	2,356	935	4,218	1,025	1,855	2,215
<b>Total 64000 · Worship</b>	<b>29,015</b>	<b>6,653</b>	<b>13,795</b>	<b>8,526</b>	<b>11,855</b>	<b>11,680</b>
65000 · Stewardship & Fundraising Expenses	5,899	1,194	1,918	3,984	7,740	3,535
<b>Total 60000 · PROGRAMS/COMMITTEES</b>	<b>70,555</b>	<b>50,267</b>	<b>61,143</b>	<b>65,945</b>	<b>89,053</b>	<b>80,714</b>
<b>70000 · EMPLOYEE COMPENSATION &amp; BENEFITS</b>						
71000 · Staff Benefits	1,759	162	1,098	1,155	1,147	1,352
72000 · Payroll						
72100 · Minister Pay & Benefits	221,419	229,475	233,714	262,650	268,914	273,127
72150 · Intern Minister Compensation	-	16,206	-	-	-	-
72158 · Sabbatical Minister Compensation			27,479			
72161 · Guest Worship Speakers Compensation		910	[See Worship Expenses]	[See Worship Expenses]	[See Worship Expenses]	[See Worship Expenses]
72200 · RE Employees	26,177	25,226	29,451	33,755	54,425	47,893
72300 · Music Employees	53,265	53,685	53,946	52,893	51,518	54,793
72400 · Administrative Employees	37,108	41,322	59,449	82,493	83,425	81,417
72500 · Payroll - Other	-	-	-	-	-	-
<b>Total 72000 · Payroll</b>	<b>337,969</b>	<b>366,824</b>	<b>404,038</b>	<b>431,790</b>	<b>458,282</b>	<b>457,230</b>
73000 · Payroll Taxes	8,243	9,567	11,542	11,348	11,915	7,117
<b>Total 70000 · EMPLOYEE COMPENSATION &amp; BENEFITS</b>	<b>347,971</b>	<b>376,553</b>	<b>416,679</b>	<b>444,293</b>	<b>471,344</b>	<b>465,699</b>
<b>Total Expenses</b>	<b>497,478</b>	<b>508,474</b>	<b>579,721</b>	<b>721,292</b>	<b>688,441</b>	<b>680,803</b>
<b>Net Operating Budget Surplus or (Shortfall):</b>	<b>\$ 43,337</b>	<b>\$ 70,158</b>	<b>\$ (5,172)</b>	<b>\$ (52,494)</b>	<b>\$ 0</b>	<b>\$ 0</b>
	<b>8.0%</b>	<b>12.1%</b>	<b>-0.9%</b>	<b>-7.8%</b>	<b>0.0%</b>	<b>0.0%</b>

Congregation: Five Prior-Years Comparison Detail

Proposed 2024-2025 Operating Budget

	2019-2020 Fiscal Year Actual	2020-2021 Fiscal Year Actual	2021-2022 Fiscal Year Actual	2022-2023 Fiscal Year Actual	2023-2024 Fiscal Year Budget	2024-2025 Fiscal Year Budget
<b>Income</b>						
<b>41000 · Contribution Income</b>						
41005 · Cash Offering	7,315	910	105	-	4,800	8,000
41006 · Donations	45,658	51,907	32,573	70,429	40,000	40,000
Pledge Matching Donations <i>(For 2024-2025 Only!)</i>						46,672
41019 · 2018-2019 Fiscal Year Pledges	9,341					
41020 · 2019-2020 Fiscal Year Pledges	301,754	19,527				
41021 · 2020-2021 Fiscal Year Pledges		348,718	3,175			
41022 · 2021-2022 Fiscal Year Pledges			350,423	10,485		
41023 · 2022-2023 Fiscal Year Pledges				295,805	10,000	
41024 · 2023-2024 Fiscal Year Pledges					381,209	8,000
41025 · 2024-2025 Fiscal Year Pledges						428,567
Less: 41100 · 2020-2021 Pledges Allocated to Sabbatical Minister Reserve		(15,000)				
Less: 2021-2022 Pledges Allocated to Intern Minister Reserve			(8,000)			
<b>Total 41000 · Contribution Income</b>	<b>364,068</b>	<b>406,062</b>	<b>378,276</b>	<b>376,718</b>	<b>436,009</b>	<b>531,239</b>
<b>42000 · Investment Income</b>						
42100 · Interest Income	-	-	-	1	-	-
<b>Total 42000 · Investment Income</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>43000 · Fundraising Income</b>						
43010 · Cultural Events	3,193	1,308	1,045	1,508	1,500	2,000
43020 · Miscellaneous Fundraisers	4,862	99	359	1,260	-	-
43030 · Annual Auction	17,277	16,883	-	12,137	16,000	14,500
43040 · Super Flea Fundraising	-	-	-	-	3,300	3,500
43060 · Equal Exchange	1,658	-	-	-	1,500	-
43080 · Life Enrichment Activities	2,969	40	907	1,542	1,000	2,500
43097 · Marathon Income						2,600
Summer Camp Income						7,850
<b>Total 43000 · Fundraising Income</b>	<b>29,959</b>	<b>18,330</b>	<b>2,311</b>	<b>16,447</b>	<b>23,300</b>	<b>32,950</b>
<b>44000 · Endowment Disbursement</b>	<b>18,518</b>	<b>21,099</b>	<b>26,189</b>	<b>32,123</b>	<b>34,590</b>	<b>37,126</b>
<b>46000 · Facilities Donations</b>						
46100 · Facilities Use Donations	38,618	47,375	64,250	65,074	34,003	40,000
<b>Total 46000 · Facilities Donations</b>	<b>38,618</b>	<b>47,375</b>	<b>64,250</b>	<b>65,074</b>	<b>34,003</b>	<b>40,000</b>
<b>47000 · Miscellaneous Income</b>						
47100 · Art Sales	70		190	1,200	-	-
47200 · Miscellaneous Income	-	2,975	-	903	-	-
<b>Total 47000 · Miscellaneous Income</b>	<b>70</b>	<b>2,975</b>	<b>190</b>	<b>2,103</b>	<b>-</b>	<b>-</b>
<b>48000 · Other Income &amp; Disbursements</b>						
<b>48200 · Reserve Funding Disbursements</b>						
48201 · Intern Fund Disbursement		8,000		-	-	-
48202 · Adult Life Enrichment Fund Disbursement (21651)	5,968					
48204 · Board Reserve Funds Disbursement			5,000	-		
48206 · Sabbatical Minister Fund Disbursement			15,000			
48207 · Operating Surplus Disbursement			15,000	93,000	132,000	-
48208 · Big Gift #3 Disbursement						39,488
48210 · Bookstore Fund Disbursement (21655)	285					
<b>Total 48200 · Reserve Funding Disbursement</b>	<b>6,253</b>	<b>8,000</b>	<b>35,000</b>	<b>93,000</b>	<b>132,000</b>	<b>39,488</b>
<b>48300 · Strategic Plan Support Funding Disbursement</b>						
48305 · Expanded Benefits Funding	6,306	9,348	7,765	16,204	3,397	-
48310 · Ministerial Compensation Funding	63,828	55,415	66,652	65,590	25,142	-
48315 · Outreach/Communication/Membership Expansion	13,195	10,028	8,916	1,539	-	-
<b>Total 48300 · Strategic Plan Support Fund Disbursement</b>	<b>83,329</b>	<b>74,791</b>	<b>83,333</b>	<b>83,333</b>	<b>28,539</b>	<b>-</b>
<b>Total 48000 · Other Income &amp; Disbursements</b>	<b>89,582</b>	<b>82,791</b>	<b>118,333</b>	<b>176,333</b>	<b>160,539</b>	<b>39,488</b>
<b>Total Income</b>	<b>540,815</b>	<b>578,632</b>	<b>589,549</b>	<b>668,798</b>	<b>688,441</b>	<b>680,803</b>

Congregation: Five Prior-Years Comparison Detail

	2019-2020 Fiscal Year Actual	2020-2021 Fiscal Year Actual	2021-2022 Fiscal Year Actual	2022-2023 Fiscal Year Actual	2023-2024 Fiscal Year Budget	2024-2025 Fiscal Year Budget
<b>Expenses</b>						
<b>50000 · ADMINISTRATION</b>						
50500 · Bank Service Charges	199	61	247	90	50	60
50510 · E-Giving Service Charges	284	1,077	1,014	967	1,490	1,200
51000 · Communications						
51100 · Advertising	515	341	991	372	2,087	1,758
51200 · Comcast Business Services	1,970	2,012	1,733	1,884	3,040	1,790
51300 · Phone System	1,112	1,026	1,026	1,026	1,140	1,077
51400 · Web Site	153	630	150	572	595	1,236
51500 · Hearing Impaired Systems	6,500	7,000	7,750	7,625	9,620	10,070
<b>Total 51000 · Communications</b>	<b>10,250</b>	<b>11,009</b>	<b>11,650</b>	<b>11,479</b>	<b>16,482</b>	<b>15,931</b>
52000 · Postage & Shipping	1,026	748	1,031	593	635	987
53000 · Office Expense						
53100 · Computers	2,371	5,302	480	79	1,200	800
53200 · Software	1,057	1,433	1,400	2,277	2,194	2,363
53300 · Office Equipment Rental	2,507	2,534	2,874	2,432	2,653	2,653
53400 · Office Supplies	1,644	1,084	1,663	982	720	780
53500 · Printing/Reproduction	2,122	2,506	712	1,442	1,399	1,965
53600 · Administrative Background Screening (Non-RE)	-	-	17	-	1,615	216
<b>Total 53000 · Office Expense</b>	<b>9,701</b>	<b>12,859</b>	<b>7,146</b>	<b>7,212</b>	<b>9,781</b>	<b>8,777</b>
54000 · Property Expense						
54100 · Facility Services						
54110 · Sexton and Cleaning Services	15,450	12,000	12,000	14,650	20,500	18,450
54120 · Janitorial Supplies	1,101	440	556	1,039	1,440	1,298
54130 · Set Up Helper	1,475		[See Employee Payroll]	[See Employee Payroll]	[See Employee Payroll]	[See Employee Payroll]
Building COVID-19 Re-Opening Expenses			579			
<b>Total 54100 · Facility Services</b>	<b>18,026</b>	<b>12,440</b>	<b>13,135</b>	<b>15,689</b>	<b>21,940</b>	<b>19,748</b>
54200 · Maintenance/Repair						
54201 · Interior Maintenance/Repair	6,812	4,606	8,438	10,505	8,070	6,006
54202 · Exterior Maintenance/Repair	36	-	17,277	9,480	1,800	2,000
<b>Total 54200 · Maintenance/Repair</b>	<b>6,848</b>	<b>4,606</b>	<b>25,715</b>	<b>19,985</b>	<b>9,870</b>	<b>8,006</b>
54299 · Property Systems / Taxes / Insurance						
54300 · Sound System/Video Equipment	-	-	8,441	4,081	400	300
54400 · Fire Systems	3,164	1,981	3,106	1,787	2,341	2,733
54500 · Property Taxes	272	267	260	264	360	260
54600 · Property/Liability Insurance	7,959	11,246	8,315	30,968	39,600	32,153
<b>Total 54299 · Property Systems / Taxes / Insurance</b>	<b>11,395</b>	<b>13,494</b>	<b>20,122</b>	<b>37,100</b>	<b>42,701</b>	<b>35,446</b>
<b>Total 54000 · Property Expense</b>	<b>36,269</b>	<b>30,540</b>	<b>58,972</b>	<b>72,775</b>	<b>74,511</b>	<b>63,200</b>
55000 · Utilities Expense						
55100 · Electric Service	675	300	1,812	1,489	1,513	1,822
55150 · Solar System Repairs and Maintenance			-	-	-	-
55200 · Gas Service	1,654	2,579	1,982	3,079	2,885	2,370
55300 · Waste Management Service	1,358	1,498	1,627	1,736	1,902	2,068
55400 · Water Service	775	944	976	966	1,016	997
55450 · Well Monitoring & Repair	7,761	4,319	5,750	6,677	7,475	5,100
<b>Total 55000 · Utilities Expense</b>	<b>12,223</b>	<b>9,640</b>	<b>12,147</b>	<b>13,946</b>	<b>14,791</b>	<b>12,356</b>
57000 · Professional Fees						
57100 · Payroll Service Fees	2,441	2,189	2,408	2,797	2,910	2,889
57300 · Legal Fees	486	5,672	58	60	-	-
57400 · Accounting Services	6,073	6,000	5,388	5,544	5,400	6,550
57500 · Licenses and Permits	-	1,800	1,818	2,153	1,994	2,439
<b>Total 57000 · Professional Expenses</b>	<b>9,000</b>	<b>15,661</b>	<b>9,672</b>	<b>10,553</b>	<b>10,304</b>	<b>11,878</b>
58000 · Contingencies, Miscellaneous, & Capital Reserve						
58100 · Contingency Expense Reserve	-	-	-	15,371	-	20,000
58150 · Furniture and Equipment	-	-	-	1,170	-	-
58175 · Outdoor Safety Improvements	-	-	-	76,898	-	-
58200 · Miscellaneous Expenses		59	20	-	-	-
58300 · Capital Replacement Revolving Reserve						
<b>Total 58000 · Contingencies and Miscellaneous</b>	<b>-</b>	<b>59</b>	<b>20</b>	<b>93,438</b>	<b>-</b>	<b>20,000</b>
<b>Total 50000 · ADMINISTRATION</b>	<b>78,952</b>	<b>81,654</b>	<b>101,899</b>	<b>211,053</b>	<b>128,044</b>	<b>134,389</b>

Congregation: Five Prior-Years Comparison Detail

	2019-2020 Fiscal Year Actual	2020-2021 Fiscal Year Actual	2021-2022 Fiscal Year Actual	2022-2023 Fiscal Year Actual	2023-2024 Fiscal Year Budget	2024-2025 Fiscal Year Budget
<b>60000 · PROGRAMS/COMMITTEES</b>						
60100 · Communications	1,797	2,755	1,094	869	3,500	3,500
60201 · UUA Annual Program Fund Support	22,777	25,054	27,100	28,596	28,714	28,471
<b>60300 · Leadership Development</b>						
60301 · Board Visioning			5,000	5,000	-	-
60302 · Strategic & Long-Term Planning Initiative	-	5,320	250	-	5,000	5,000
60320 · Leadership Training & Development	1,290	-	-	-	2,000	-
<b>Total 60300 · Leadership Development</b>	<b>1,290</b>	<b>5,320</b>	<b>5,250</b>	<b>5,000</b>	<b>7,000</b>	<b>5,000</b>
<b>61000 · Lifelong Learning</b>						
61100 · Life Enrichment	140	191	-	-	180	665
<b>61300 · Religious Exploration</b>						
61310 · RE Supplies	382	1,348	1,270	917	4,890	2,000
61315 · Curricula	86	36	510	126	756	620
61320 · RE Training	760	-	-	-	1,000	1,000
61330 · RE Travel	313	-	-	-	-	-
61341 · RE Food	96	-	381	1,029	1,590	1,590
61351 · RE Background Screening Summer Camp Expenses	287	82	164	205	441	296
61360 · RE Recognition/Appreciation	-	-	111	-	110	200
<b>Total 61300 · Religious Exploration</b>	<b>1,924</b>	<b>1,466</b>	<b>2,436</b>	<b>2,277</b>	<b>8,787</b>	<b>9,206</b>
<b>Total 61000 · Lifelong Learning</b>	<b>2,064</b>	<b>1,657</b>	<b>2,436</b>	<b>2,277</b>	<b>8,967</b>	<b>9,871</b>
<b>62000 · Congregational Life</b>						
62100 · Membership	290	61	85	493	1,220	1,150
62300 · Caring Network	171	154	77	232	600	650
<b>62400 · Building &amp; Grounds</b>						
62410 · B & G Inside Improvements	-	-	-	2,972	6,000	5,000
62420 · B & G Outside Improvements	-	-	1,827	-	1,800	4,000
<b>Total 62400 · Building &amp; Grounds</b>	<b>-</b>	<b>-</b>	<b>1,827</b>	<b>2,972</b>	<b>7,800</b>	<b>9,000</b>
62500 · Events and Fellowship	1,745	369	1,012	797	4,157	4,157
<b>Total 62000 · Congregational Life</b>	<b>2,206</b>	<b>584</b>	<b>3,001</b>	<b>4,493</b>	<b>13,777</b>	<b>14,957</b>
<b>63000 · Social Justice</b>						
63100 · Social Justice Outreach	507	2,050	1,550	7,200	2,500	1,700
63105 · COPA Membership	5,000	5,000	5,000	5,000	5,000	2,000
<b>Total 63000 · Social Justice</b>	<b>5,507</b>	<b>7,050</b>	<b>6,550</b>	<b>12,200</b>	<b>7,500</b>	<b>3,700</b>
<b>64000 · Worship</b>						
<b>64100 · Music Programs</b>						
64110 · Music Equipment	18,980	600	1,238	1,125	1,000	1,000
64120 · Music Supplies	3,287	2,273	3,639	2,331	3,500	3,465
64130 · Musicians—Occasional	4,392	2,645	4,700	4,045	5,000	5,000
64140 · Choir Enrichment Activities	-	200	-	-	500	-
<b>Total 64100 · Music Programs</b>	<b>26,659</b>	<b>5,718</b>	<b>9,577</b>	<b>7,501</b>	<b>10,000</b>	<b>9,465</b>
<b>64200 · Worship Expenses</b>						
64220 · Worship Speaker Expenses	1,713	-	3,831	855	1,455	1,455
64230 · Worship Supplies	643	935	386	170	400	760
<b>Total 64200 · Worship Expenses</b>	<b>2,356</b>	<b>935</b>	<b>4,217</b>	<b>1,025</b>	<b>1,855</b>	<b>2,215</b>
<b>Total 64000 · Worship</b>	<b>29,015</b>	<b>6,653</b>	<b>13,794</b>	<b>8,526</b>	<b>11,855</b>	<b>11,680</b>
<b>65000 · Stewardship &amp; Fundraising Expenses</b>						
65100 · Stewardship Expenses	1,055	60	1,418	2,035	3,100	1,000
65300 · Cultural Events Expenses	2,189	834	200	1,297	900	900
65400 · Annual Service Auction Expenses	1,910	300	300	652	440	885
65500 · Super Flea Expenses	-	-	-	-	300	150
65600 · Equal Exchange Expenses	745	-	-	-	1,800	-
65700 · Endowment Expenses	745	-	-	-	1,200	600
<b>Total 65000 · Stewardship &amp; Fundraising Expenses</b>	<b>6,644</b>	<b>1,194</b>	<b>1,918</b>	<b>3,984</b>	<b>7,740</b>	<b>3,535</b>
68000 · Finance Committee Expenses	-	-	-	-	-	-
<b>Total 60000 · PROGRAMS/COMMITTEES</b>	<b>71,300</b>	<b>50,267</b>	<b>61,143</b>	<b>65,945</b>	<b>89,053</b>	<b>80,714</b>

Congregation: Five Prior-Years Comparison Detail

	2019-2020 Fiscal Year Actual	2020-2021 Fiscal Year Actual	2021-2022 Fiscal Year Actual	2022-2023 Fiscal Year Actual	2023-2024 Fiscal Year Budget	2024-2025 Fiscal Year Budget
<b>70000 · EMPLOYEE COMPENSATION &amp; BENEFITS</b>						
<b>71000 · Staff Benefits</b>						
71600 · Workers Compensation Insurance	1,759	162	1,098	1,155	1,147	1,352
<b>Total 71000 · Staff Benefits</b>	<b>1,759</b>	<b>162</b>	<b>1,098</b>	<b>1,155</b>	<b>1,147</b>	<b>1,352</b>
<b>72000 · Payroll</b>						
<b>72100 · Minister Pay &amp; Benefits</b>						
72101 · Minister Housing Allowance	53,654	54,000	55,044	59,307	63,230	65,127
72102 · Minister Bonus				8,212	-	-
72103 · Minister Salary	94,049	98,794	101,345	107,268	114,638	118,077
72104 · Minister Professional Expenses	15,958	15,190	15,491	16,424	17,787	18,320
<b>72106 · Minister Benefits</b>						
72107 · Minister Retirement Contribution	14,770	15,190	15,506	18,185	17,787	18,320
72108 · Medical Insurance	28,776	31,082	32,590	38,379	38,186	35,514
72109 · In-Lieu of FICA/Medicare 7.65% (Base Cap)	11,382	11,410	11,845	12,564	13,607	14,015
72111 · Dental Insurance	(242)	1,320	1,217	1,272	1,152	1,152
72113 · Life & AD&D Insurance	1,224	1,276	676	805	748	769
72114 · LTD Insurance	1,848	1,213	-	233	1,780	1,832
<b>Total 72106 · Minister Benefits</b>	<b>57,758</b>	<b>61,491</b>	<b>61,834</b>	<b>71,438</b>	<b>73,260</b>	<b>71,603</b>
<b>Total 72100 · Minister Pay &amp; Benefits</b>	<b>221,419</b>	<b>229,475</b>	<b>233,714</b>	<b>262,650</b>	<b>268,914</b>	<b>273,127</b>
<b>72150 · Intern Minister</b>						
72160 · Intern Minister Compensation		15,739				
72165 · Intern Minister Professional Expenses		467				
<b>Total 72150 · Intern Minister</b>	<b>-</b>	<b>16,206</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>72158 · Sabbatical Minister Compensation</b>			27,479			
72161 · Guest Worship Speakers Compensation		910	[See Worship Expenses]	[See Worship Expenses]	[See Worship Expenses]	[See Worship Expenses]
<b>72200 · RE Employees</b>						
72210 · RE Director	20,481	20,970	21,907	22,574	25,400	26,162
72211 · DRE Retirement Contribution	747	-	288	405	2,540	2,616
72212 · DRE Retirement Contributions in Arrears			3,018			
72212 · DRE Medical Insurance	-		1,648	7,402	9,190	-
72213 · DRE Life & AD&D Insurance	-	-	31	200	214	220
72214 · DRE LTD Insurance	84	-	48	310	330	340
72215 · DRE Professional Expenses	255	800	-	-	2,540	2,616
72216 · DRE Dental Insurance	-		87	448	288	-
72220 · RE Team Members	4,610	3,456	2,424	2,416	13,921	14,339
Summer Camp Staff						1,600
72224 · RE Director Bonus						-
<b>Total 72200 · RE Employees</b>	<b>26,177</b>	<b>25,226</b>	<b>29,451</b>	<b>33,755</b>	<b>54,423</b>	<b>47,893</b>
<b>72300 · Music Employees</b>						
72310 · Music Director	27,565	27,583	28,658	30,862	29,240	30,117
72311 · Music Director Retirement Contribution	2,757	2,758	2,869	2,024	1,237	3,012
72312 · Music Director Medical Insurance	5,905	5,482	5,934	1,404	-	-
72313 · Music Director Life & AD&D Insurance	-	-	-	-	244	252
72314 · Music Director LTD Insurance	-	-	-	-	390	392
72315 · Music Director Professional Expense	2,147	1,378	980	15	2,924	3,012
72316 · Music Director Dental Insurance	310	305	288	149	-	-
72324 · Music Director Bonus				1,521	-	-
72320 · Staff Accompanist	14,581	14,871	15,217	16,110	17,483	18,008
72321 · Staff Accompanist Bonus				807	-	-
72325 · Occasional Musicians Compensation		1,308	[See Music Expenses]	[See Music Expenses]	[See Music Expenses]	[See Music Expenses]
<b>Total 72300 · Music Employees</b>	<b>53,265</b>	<b>53,685</b>	<b>53,946</b>	<b>52,892</b>	<b>51,518</b>	<b>54,793</b>
<b>72400 · Administrative Employees</b>						
72410 · Administrator	21,602	20,963	23,661	27,071	27,643	26,000
72411 · Administrator Retirement Contribution	-	1,092	2,275	2,824	2,764	800
72412 · Administrator LTD Insurance	(186)	-	-	-	-	338
72413 · Administrator Life & AD&D Insurance	-	-	-	-	-	218
72414 · Administrator Bonus				1,170	-	-
72415 · Admin Professional Expense	-	-	-	-	450	450
72420 · Office Assistant	15,692	17,317	16,730	20,520	23,202	23,909
72421 · Office Assistant Life & AD&D Insurance	-	-	-	-	193	-
72422 · Office Assistant LTD Insurance	-	-	-	-	302	-
72423 · Office Assistant Retirement Contribution	-		1,318	2,153	2,320	2,391
72424 · Office Assistant Bonus				1,012	-	-
72430 · Set-Up Assistance		1,950	1,800	1,800	1,200	1,200
72431 · Videographer			13,665	25,943	25,350	26,111
<b>Total 72400 · Administrative Employees</b>	<b>37,108</b>	<b>41,322</b>	<b>59,449</b>	<b>82,493</b>	<b>83,425</b>	<b>81,417</b>
<b>72500 · Payroll - Other</b>						
<b>Total 72000 · Payroll</b>	<b>337,969</b>	<b>366,824</b>	<b>404,038</b>	<b>431,790</b>	<b>458,280</b>	<b>457,230</b>
<b>73000 · Payroll Taxes</b>	<b>8,243</b>	<b>9,567</b>	<b>11,542</b>	<b>11,348</b>	<b>11,915</b>	<b>7,117</b>
<b>Total 70000 · EMPLOYEE COMPENSATION &amp; BENEFITS</b>	<b>347,971</b>	<b>376,553</b>	<b>416,679</b>	<b>444,293</b>	<b>471,342</b>	<b>465,699</b>
<b>Total Expenses</b>	<b>498,223</b>	<b>508,474</b>	<b>579,721</b>	<b>721,290</b>	<b>688,439</b>	<b>680,803</b>
Net Operating Budget Surplus or (Shortfall):	\$ 42,592	\$ 70,158	\$ (5,172)	\$ (52,492)	\$ 0	\$ 0
	8.5%	13.8%	-0.9%	-7.8%	0%	0%

**Congregation: Proposed 2024-2025 Fiscal Year Operating Budget - Detail by Month**

	July	August	September	October	November	December	January	February	March	April	May	June	2024-2025 Fiscal Year Budget
<b>INCOME</b>													
<b>41000 - Contribution Income</b>													
41005 - Cash Offering	620	620	760	620	620	760	620	620	760	620	620	760	8,000
41006 - Donations	4,500	4,500	1,600	1,800	1,800	8,000	5,000	2,500	1,800	3,000	3,500	2,000	40,000
Pledge Matching Donations (For 2024-2025 Only!)	26,672	15,000										5,000	46,672
41024 - Pledges for 2023-2024 Fiscal Year	5,000	3,000											8,000
41025 - Pledges for 2024-2025 Fiscal Year	98,570	17,143	21,428	17,143	42,857	128,570	21,428	17,143	21,428	8,571	12,857	21,428	428,567
<b>Total 41000 - Contribution Income</b>	<b>135,362</b>	<b>40,263</b>	<b>23,788</b>	<b>19,563</b>	<b>45,277</b>	<b>137,330</b>	<b>27,048</b>	<b>20,263</b>	<b>23,988</b>	<b>12,191</b>	<b>16,977</b>	<b>29,188</b>	<b>531,239</b>
<b>42000 - Investment Income</b>													
42100 - Interest Income													-
<b>Total 42000 - Investment Income</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>43000 - Fundraising Income</b>													
43010 - Cultural Events Income			500		500		500			500			2,000
43020 - Miscellaneous Fundraising Income													-
43030 - Annual Auction Income				13,000	1,500								14,500
43040 - Super Flea Fundraising Income			3,500										3,500
43060 - Equal Exchange Income													-
43080 - Life Enrichment Activities Income			150	200	300	300	300	350	300	350	250		2,500
43097 - Marathon Income		1,100							1,500				2,600
Summer Camp Income										2,000	4,000	1,850	7,850
<b>Total 43000 - Fundraising Income</b>	<b>-</b>	<b>1,100</b>	<b>4,150</b>	<b>13,200</b>	<b>2,300</b>	<b>300</b>	<b>800</b>	<b>350</b>	<b>1,800</b>	<b>2,850</b>	<b>4,250</b>	<b>1,850</b>	<b>32,950</b>
<b>44000 - Endowment Disbursement</b>	<b>37,126</b>												<b>37,126</b>
<b>46000 - Facilities Donations</b>													
46100 - Facilities Use Donations	5,750	5,500	5,000	6,250	5,500	6,000	1,000	1,000	1,000	1,000	1,000	1,000	40,000
<b>Total 46000 - Facilities Donations</b>	<b>5,750</b>	<b>5,500</b>	<b>5,000</b>	<b>6,250</b>	<b>5,500</b>	<b>6,000</b>	<b>1,000</b>	<b>1,000</b>	<b>1,000</b>	<b>1,000</b>	<b>1,000</b>	<b>1,000</b>	<b>40,000</b>
<b>47000 - Miscellaneous Income</b>													
47100 - Art Sales													-
47200 - Miscellaneous Income													-
<b>Total 47000 - Miscellaneous Income</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>48000 - Other Income &amp; Disbursements</b>													
48200 - Reserve Funding Disbursements													
48207 - Operating Surplus Disbursement													-
48208 - Big Gift #3 Disbursement	5,865	4,182	2,806	2,806	2,806	2,806	4,182	2,806	2,806	2,806	2,806	2,806	39,488
<b>Total 48200 - Reserve Funding Disbursement</b>	<b>5,865</b>	<b>4,182</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>4,182</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>39,488</b>
<b>Total 48000 - Other Income &amp; Disbursements</b>	<b>5,865</b>	<b>4,182</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>4,182</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>2,806</b>	<b>39,488</b>
<b>Total Income</b>	<b>184,104</b>	<b>51,045</b>	<b>35,745</b>	<b>41,819</b>	<b>55,883</b>	<b>146,437</b>	<b>33,031</b>	<b>24,419</b>	<b>29,595</b>	<b>18,848</b>	<b>25,033</b>	<b>34,845</b>	<b>680,803</b>

Congregation: Proposed 2024-2025 Fiscal Year Operating Budget - Detail by Month

	July	August	September	October	November	December	January	February	March	April	May	June	2024-2025 Fiscal Year Budget
<b>EXPENSES</b>													
<b>50000 · ADMINISTRATION</b>													
<b>50500 · Bank Service Charges</b>	60												60
<b>50510 · E-Giving Service Charges</b>	100	100	100	100	100	100	100	100	100	100	100	100	1,200
<b>51000 · Communications</b>													
51100 · Advertising	27	52	177	52	27	177	29	54	879	54	29	204	1,758
51200 · Comcast Business Services	145	145	145	145	145	145	145	155	155	155	155	155	1,790
51300 · Phone System	86	86	86	86	86	86	94	94	94	94	94	94	1,077
51400 · Web Site	326			595								315	1,236
51500 · Hearing Impaired Systems	760	760	950	760	760	1,140	760	760	950	760	760	950	10,070
<b>Total 51000 · Communications</b>	<b>1,343</b>	<b>1,042</b>	<b>1,357</b>	<b>1,637</b>	<b>1,017</b>	<b>1,547</b>	<b>1,028</b>	<b>1,063</b>	<b>2,078</b>	<b>1,063</b>	<b>1,353</b>	<b>1,403</b>	<b>15,931</b>
<b>52000 · Postage &amp; Shipping</b>	50	50	50	75	50	186	50	110	50	50	130	136	987
<b>53000 · Office Expense</b>													
53100 · Computers	200			200			200			200			800
53200 · Software	369	357	137	137	137	137	137	140	192	140	340	140	2,363
53300 · Office Equipment Rental	221	221	221	221	221	221	221	221	221	221	221	221	2,653
53400 · Office Supplies	65	65	65	65	65	65	65	65	65	65	65	65	780
53500 · Printing/Reproduction	164	164	164	164	164	164	164	164	164	164	164	164	1,965
53600 · Administrative Background Screening	216												216
<b>Total 53000 · Office Expense</b>	<b>1,235</b>	<b>807</b>	<b>587</b>	<b>787</b>	<b>587</b>	<b>587</b>	<b>787</b>	<b>590</b>	<b>642</b>	<b>790</b>	<b>790</b>	<b>590</b>	<b>8,777</b>
<b>54000 · Property Expense</b>													
<b>54100 · Facility Services</b>													
54110 · Sexton and Cleaning Services	1,288	1,288	1,288	1,288	2,788	1,288	1,288	1,288	1,288	2,788	1,288	1,288	18,450
54120 · Janitorial Supplies	108	108	108	108	108	108	108	108	108	108	108	108	1,298
<b>Total 54100 · Facility Services</b>	<b>1,396</b>	<b>1,396</b>	<b>1,396</b>	<b>1,396</b>	<b>2,896</b>	<b>1,396</b>	<b>1,396</b>	<b>1,396</b>	<b>1,396</b>	<b>2,896</b>	<b>1,396</b>	<b>1,396</b>	<b>19,748</b>
<b>54200 · Maintenance/Repair</b>													
54201 · Interior Maintenance/Repair	336	336	336	984	336	336	336	984	336	346	994	346	6,006
54202 · Exterior Maintenance/Repair	167	167	167	167	167	167	167	167	167	167	167	167	2,000
<b>Total 54200 · Maintenance/Repair</b>	<b>503</b>	<b>503</b>	<b>503</b>	<b>1,151</b>	<b>503</b>	<b>503</b>	<b>503</b>	<b>1,151</b>	<b>503</b>	<b>513</b>	<b>1,161</b>	<b>513</b>	<b>8,006</b>
<b>54300 · Property Systems / Taxes / Insurance</b>									194				
54310 · Sound System/Video Equipment	300												300
54320 · Fire Systems	279	99	99	279	99	99	1,054	109	109	289	109	109	2,733
54330 · Property Taxes				130				130					260
54340 · Property/Liability Insurance	14,266	2,027		7,929			7,929						32,152
<b>Total 54300 · Property Systems / Taxes / Insurance</b>	<b>14,845</b>	<b>2,126</b>	<b>99</b>	<b>8,339</b>	<b>99</b>	<b>99</b>	<b>8,983</b>	<b>239</b>	<b>109</b>	<b>289</b>	<b>109</b>	<b>109</b>	<b>35,446</b>
<b>Total 54000 · Property Expense</b>	<b>16,743</b>	<b>4,025</b>	<b>1,997</b>	<b>10,885</b>	<b>3,497</b>	<b>1,997</b>	<b>10,882</b>	<b>2,785</b>	<b>2,007</b>	<b>3,697</b>	<b>2,665</b>	<b>2,017</b>	<b>63,199</b>
<b>55000 · Utilities Expense</b>													
55100 · Electric Service	68	68	68	68	68	68	68	1,068	68	68	68	68	1,822
55150 · Solar System Repairs and Maintenance													-
55200 · Gas Service	140	140	115	95	75	100	125	300	340	400	340	200	2,370
55300 · Waste Management Service	492			492			542			542			2,068
55400 · Water Service	79	79	79	79	79	79	87	87	87	87	87	87	997
55450 · Well Monitoring & Repair	400	400	400	400	400	400	400	400	400	400	400	700	5,100
<b>Total 55000 · Utilities Expense</b>	<b>1,180</b>	<b>688</b>	<b>663</b>	<b>1,135</b>	<b>623</b>	<b>648</b>	<b>1,222</b>	<b>1,855</b>	<b>895</b>	<b>1,497</b>	<b>895</b>	<b>1,055</b>	<b>12,356</b>
<b>57000 · Professional Fees</b>													
57100 · Payroll Service Fees	199	298	199	218	218	218	448	218	218	218	218	218	2,889
57300 · Legal Fees													-
57400 · Accounting Services	450	450	450	950	450	500	500	450	950	450	450	500	6,550
57500 · Licenses and Permits			20	25		25		69				2,300	2,439
<b>Total 57000 · Professional Expenses</b>	<b>649</b>	<b>748</b>	<b>669</b>	<b>1,193</b>	<b>668</b>	<b>743</b>	<b>948</b>	<b>737</b>	<b>1,168</b>	<b>668</b>	<b>668</b>	<b>3,018</b>	<b>11,878</b>
<b>58000 · Contingencies, Miscellaneous, &amp; Capital Reserve</b>													
58100 · Contingency Expense Reserve	20,000												20,000
58200 · Miscellaneous Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-
58300 · Capital Replacement Revolving Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total 58000 · Contingencies, Miscellaneous, &amp; Capital Reserve</b>	<b>20,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>20,000</b>
<b>Total 50000 · ADMINISTRATION</b>	<b>41,359</b>	<b>7,459</b>	<b>5,422</b>	<b>15,812</b>	<b>6,542</b>	<b>5,808</b>	<b>15,016</b>	<b>7,241</b>	<b>6,941</b>	<b>7,866</b>	<b>6,602</b>	<b>8,320</b>	<b>134,389</b>

Congregation: Proposed 2024-2025 Fiscal Year Operating Budget - Detail by Month

	July	August	September	October	November	December	January	February	March	April	May	June	2024-2025 Fiscal Year Budget
<b>60000 · PROGRAMS/COMMITTEES</b>													
60100 · Communications	600	250	250	1,050	250	250		250	250	250	50	50	3,500
60201 · UUA Annual Program Fund Support	2,373	2,373	2,373	2,373	2,373	2,373	2,373	2,373	2,373	2,373	2,373	2,373	28,471
60300 · Leadership Development													
60301 · Board Visioning			1,250			1,250			1,250			1,250	5,000
60302 · Strategic & Long-Term Planning Initiative													-
60320 · Leadership Training & Development													-
<b>Total 60300 · Leadership Development</b>	-	-	1,250	-	-	1,250	-	-	1,250	-	-	1,250	5,000
61000 · Lifelong Learning													
61100 · Life Enrichment Expenses	445	20	20	20	20	20	20	20	20	20	20	20	665
61300 · Religious Exploration													
61310 · RE Supplies	100	300	100	100	400	100	100	100	100	100	400	100	2,000
61315 · Curricula	120		125			125			125			125	620
61320 · RE Training									1,000				1,000
61330 · RE Travel													-
61341 · RE Food	133	133	133	133	133	133	133	133	133	133	133	133	1,590
61351 · RE Background Screening		296											296
Summer Camp Expenses											1,000	2,500	3,500
61360 · RE Recognition/Appreciation											200		200
<b>Total 61300 · Religious Exploration</b>	353	729	358	233	533	358	233	233	1,358	233	1,733	2,858	9,206
<b>Total 61000 · Lifelong Learning</b>	798	749	378	253	553	378	253	253	1,378	253	1,753	2,878	9,871
62000 · Congregational Life													
62100 · Membership	325	25	50	125	50	25	25	50	25	125	300	25	1,150
62300 · Caring Network	100	50	50	50	50	50	50	50	50	50	50	50	650
62400 · Building & Grounds													
62410 · B & G Inside Improvements	5,000												5,000
62420 · B & G Outside Improvements	4,000												4,000
<b>Total 62400 · Building &amp; Grounds</b>	9,000	-	-	-	-	-	-	-	-	-	-	-	9,000
62500 · Events and Fellowship	325	260	460	325	560	317	325	360	260	445	260	260	4,157
<b>Total 62000 · Congregational Life</b>	9,750	335	560	500	660	392	400	460	335	620	610	335	14,957
63000 · Social Justice													
63100 · Social Justice Outreach	192	592	92	92	92	92	92	91	91	91	91	92	1,700
63105 · COPA Membership	2,000												2,000
<b>Total 63000 · Social Justice</b>	2,192	592	92	92	92	92	92	91	91	91	91	92	3,700
64000 · Worship													
64100 · Music Programs													
64110 · Music Equipment	250			250			250			250			1,000
64120 · Music Supplies	210	210	210	210	100	210	1,065	200	530	210	210	100	3,465
64130 · Musicians--Occasional	400	400	400	400	400	600	400	400	400	400	400	400	5,000
64140 · Choir Enrichment Activities													-
<b>Total 64100 · Music Programs</b>	860	610	610	860	500	810	1,715	600	930	860	610	500	9,465
64200 · Guest Worship Expenses													
64220 · Guest Worship Speaker Expenses	485	485										485	1,455
64230 · Worship Supplies	12	12	12	12	12	12	12	12	372	12	268	12	760
<b>Total 64200 · Worship Expenses</b>	497	497	12	12	12	12	12	12	372	12	268	497	2,215
<b>Total 64000 · Worship</b>	1,357	1,107	622	872	512	822	1,727	612	1,302	872	878	997	11,680
65000 · Stewardship & Fundraising Expenses													
65100 · Stewardship Expenses								250	250	250	250		1,000
65300 · Cultural Events Expenses					300			300		300			900
65400 · Annual Service Auction Expenses				400	100					385			885
65500 · Super Flea Expenses			150										150
65600 · Equal Exchange Expenses													-
65700 · Endowment Expenses	50	50	50	50	50	50	50	50	50	50	50	50	600
<b>Total 65000 · Stewardship &amp; Fundraising Expenses</b>	50	50	200	450	450	50	50	600	300	985	300	50	3,535
68000 · Finance Committee Expenses													-
<b>Total 68000 · Finance Committee Expenses</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total 60000 · PROGRAMS/COMMITTEES</b>	<b>17,119</b>	<b>5,455</b>	<b>5,724</b>	<b>5,589</b>	<b>4,889</b>	<b>5,606</b>	<b>4,894</b>	<b>4,638</b>	<b>7,278</b>	<b>5,443</b>	<b>6,054</b>	<b>8,024</b>	<b>80,714</b>



Congregation: Proposed 2024-2025 Fiscal Year Operating Budget - Detail by Month

	July	August	September	October	November	December	January	February	March	April	May	June	2024-2025 Fiscal Year Budget
<b>70000 · EMPLOYEE COMPENSATION &amp; BENEFITS</b>													
<b>71000 · Staff Benefits</b>													
71600 · Workers Compensation Insurance	104	156	104	104	104	104	156	104	104	104	104	104	1,352
<b>Total 71000 · Staff Benefits</b>	<b>104</b>	<b>156</b>	<b>104</b>	<b>104</b>	<b>104</b>	<b>104</b>	<b>156</b>	<b>104</b>	<b>104</b>	<b>104</b>	<b>104</b>	<b>104</b>	<b>1,352</b>
<b>72000 · Payroll</b>													
<b>72100 · Minister Pay &amp; Benefits</b>													
72101 · Minister Housing Allowance	5,010	7,515	5,010	5,010	5,010	5,010	7,515	5,010	5,010	5,010	5,010	5,010	65,127
72102 · Minister Bonus													-
72103 · Minister Salary	9,083	13,624	9,083	9,083	9,083	9,083	13,624	9,083	9,083	9,083	9,083	9,083	118,077
72104 · Minister Professional Expenses	18,320												18,320
<b>72106 · Minister Benefits</b>													
72107 · Minister Retirement Contribution	1,409	2,114	1,409	1,409	1,409	1,409	2,114	1,409	1,409	1,409	1,409	1,409	18,320
72108 · Medical Insurance	2,956	2,621	2,956	2,956	2,956	2,956	2,621	2,956	2,956	2,956	3,311	3,311	35,514
72109 · In-Lieu of FICA/Medicare 7.65% (Base Cap)	1,078	1,617	1,078	1,078	1,078	1,078	1,617	1,078	1,078	1,078	1,078	1,078	14,015
72111 · Minister Dental Insurance	98	87	98	98	98	98	87	98	98	98	98	98	1,152
72113 · Minister Life & AD&D Insurance	69	39	69	69	69	69	39	69	69	69	69	69	769
72114 · Minister LTD Insurance	156	135	156	156	156	156	135	156	156	156	156	156	1,832
<b>Total 72106 · Minister Benefits</b>	<b>5,767</b>	<b>6,614</b>	<b>5,767</b>	<b>5,767</b>	<b>5,767</b>	<b>5,767</b>	<b>6,614</b>	<b>5,767</b>	<b>5,767</b>	<b>5,767</b>	<b>6,121</b>	<b>6,121</b>	<b>71,603</b>
<b>Total 72100 · Minister Pay &amp; Benefits</b>	<b>38,180</b>	<b>27,753</b>	<b>19,859</b>	<b>19,859</b>	<b>19,859</b>	<b>19,859</b>	<b>27,753</b>	<b>19,859</b>	<b>19,859</b>	<b>19,859</b>	<b>20,214</b>	<b>20,214</b>	<b>273,127</b>
<b>72150 · Intern Minister</b>													
72151 · Intern Minister Compensation		-											-
72155 · Intern Minister Professional Expenses													-
<b>Total Intern Minister</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>72200 · RE Employees</b>													
72210 · RE Director	2,012	3,019	2,012	2,012	2,012	2,012	3,019	2,012	2,012	2,012	2,012	2,012	26,162
72211 · DRE Retirement Contribution	201	302	201	201	201	201	302	201	201	201	201	201	2,616
72212 · DRE Medical Insurance													-
72213 · DRE Life & AD&D Insurance	18	18	18	18	18	18	18	18	18	18	18	18	220
72214 · DRE LTD Insurance	28	28	28	28	28	28	28	28	28	28	28	28	340
72215 · DRE Professional Expenses	2,616												2,616
72216 · DRE Dental Insurance													-
Summer Camp Staff												1,600	1,600
72220 · RE Team Members	1,103	1,655	1,103	1,103	1,103	1,103	1,655	1,103	1,103	1,103	1,103	1,103	14,339
<b>Total 72200 · RE Employees</b>	<b>5,980</b>	<b>5,022</b>	<b>3,363</b>	<b>3,363</b>	<b>3,363</b>	<b>3,363</b>	<b>5,022</b>	<b>3,363</b>	<b>3,363</b>	<b>3,363</b>	<b>3,363</b>	<b>4,963</b>	<b>47,893</b>
<b>72300 · Music Employees</b>													
72310 · Music Director	2,317	3,475	2,317	2,317	2,317	2,317	3,475	2,317	2,317	2,317	2,317	2,317	30,117
72311 · Music Director Retirement Contribution	232	348	232	232	232	232	348	232	232	232	232	232	3,012
72312 · Music Director Medical Insurance													-
72313 · Music Director Life & AD&D Insurance	21	21	21	21	21	21	21	21	21	21	21	21	253
72314 · Music Director LTD Insurance	33	33	33	33	33	33	33	33	33	33	33	33	392
72315 · Music Director Professional Expense	3,012												3,012
72316 · Music Director Dental Insurance													-
72324 · Music Director Bonus													-
72320 · Staff Accompanist	1,385	2,078	1,385	1,385	1,385	1,385	2,078	1,385	1,385	1,385	1,385	1,385	18,008
<b>Total 72300 · Music Employees</b>	<b>6,999</b>	<b>5,954</b>	<b>3,987</b>	<b>3,987</b>	<b>3,987</b>	<b>3,987</b>	<b>5,954</b>	<b>3,987</b>	<b>3,987</b>	<b>3,987</b>	<b>3,987</b>	<b>3,987</b>	<b>54,793</b>

**Congregation: Proposed 2024-2025 Fiscal Year Operating Budget - Detail by Month**

	July	August	September	October	November	December	January	February	March	April	May	June	2024-2025 Fiscal Year Budget
<b>72400 · Administrative Employees</b>													
72410 · Administrator	2,000	3,000	2,000	2,000	2,000	2,000	3,000	2,000	2,000	2,000	2,000	2,000	26,000
72411 · Administrator Retirement Contribution	-	-	-	-	-	-	-	-	200	200	200	200	800
72412 · Administrator LTD Insurance	28	28	28	28	28	28	28	28	28	28	28	28	338
72413 · Administrator Life & AD&D Insurance	18	18	18	18	18	18	18	18	18	18	18	18	218
72414 · Administrator Bonus													-
72415 · Admin Professional Expense	450												450
72420 · Office Assistant	1,839	2,759	1,839	1,839	1,839	1,839	2,759	1,839	1,839	1,839	1,839	1,839	23,909
72421 · Office Assistant Life & AD&D Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-
72422 · Office Assistant LTD Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-
72423 · Office Assistant Retirement Contribution	184	276	184	184	184	184	276	184	184	184	184	184	2,391
72424 · Office Assistant Bonus													-
72430 · Set-Up Assistance	100	100	100	100	100	100	100	100	100	100	100	100	1,200
72431 · Videography Team	2,009	3,013	2,009	2,009	2,009	2,009	3,013	2,009	2,009	2,009	2,009	2,009	26,111
<b>Total 72400 · Administrative Employees</b>	<b>6,628</b>	<b>9,194</b>	<b>6,178</b>	<b>6,178</b>	<b>6,178</b>	<b>6,178</b>	<b>9,194</b>	<b>6,178</b>	<b>6,378</b>	<b>6,378</b>	<b>6,378</b>	<b>6,378</b>	<b>81,417</b>
<b>72500 · Payroll - Other</b>													
<b>Total 72000 · Payroll</b>	<b>57,786</b>	<b>47,922</b>	<b>33,388</b>	<b>33,388</b>	<b>33,388</b>	<b>33,388</b>	<b>47,922</b>	<b>33,388</b>	<b>33,588</b>	<b>33,588</b>	<b>33,943</b>	<b>35,543</b>	<b>457,231</b>
<b>73000 · Payroll Taxes</b>	<b>899</b>	<b>746</b>	<b>520</b>	<b>520</b>	<b>520</b>	<b>520</b>	<b>746</b>	<b>520</b>	<b>523</b>	<b>523</b>	<b>528</b>	<b>553</b>	<b>7,117</b>
<b>Total 70000 · Employee Compensation &amp; Benefits</b>	<b>58,790</b>	<b>48,824</b>	<b>34,011</b>	<b>34,011</b>	<b>34,011</b>	<b>34,011</b>	<b>48,824</b>	<b>34,011</b>	<b>34,215</b>	<b>34,215</b>	<b>34,575</b>	<b>36,200</b>	<b>465,699</b>
<b>Total Expenses</b>	<b>117,268</b>	<b>61,738</b>	<b>45,158</b>	<b>55,412</b>	<b>45,443</b>	<b>45,426</b>	<b>68,735</b>	<b>45,890</b>	<b>48,434</b>	<b>47,523</b>	<b>47,231</b>	<b>52,544</b>	<b>680,803</b>

Net Operating Budget Surplus or (Shortfall):

\$	0
	0.0%

Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Proposed Budget Notes for 2024-2025 Operating Plan		
Income		
Category	Account	Comments & Notes
41000 · Contribution Income		
	41005 · Cash Offering	Cash receipts from the Sunday services collection are split with half donated to the monthly shared-plate recipient.
	41006 · Donations	Primarily donations from unpledged individuals and families and contributions from individuals and families in excess of pledged amounts for 2024-2025.
	Pledge Matching Donations (For 2024-2025 Only!)	Donations made by generous supporters of the church to drive the special matching program for 2024-2025 ONLY to encourage 25% growth in pledge income and encourage individuals and families to make pledges representing at least 5% of household income.
	41024 · Pledges for 2023-2024 Fiscal Year	Runout and late payments for the congregation's pledge commitments for the prior 2023-2024 fiscal year.
	41025 · Pledges for 2024-2025 Fiscal Year	Income from payments of the congregation's pledge commitments for the 2024-2025 fiscal year.
42000 · Investment Income		
	42100 · Interest Income	No interest income is retained in the church's annual operating plan.
43000 · Fundraising Income		
	43010 · Cultural Events	Includes primarily ticket sales for music events sponsored by the Music Committee. See <i>Cultural Events Expenses</i> line under 65300.
	43020 · Miscellaneous Fundraisers	Special, ad hoc, or one-time fundraising activities or events.
	43030 · Annual Auction	Gross receipts from annual service auction. See <i>Annual Service Auction Expenses</i> line under 65400.
	43040 · Super Flea Fundraising	Gross receipts from Super Flea fundraising event. See <i>Super Flea Expenses</i> line under 65500.
	43060 · Equal Exchange	Gross receipts collected through sale of Equal Exchange products and merchandise. See <i>65600 · Equal Exchange Expenses</i> for cost of goods sold and any other related expenses.
	43080 · Life Enrichment Activities Income	Donations received from participants in periodic and ongoing Adult Life Enrichment classes and activities sponsored by UUCMP.
	Summer Camp	Gross receipts from registration fees for Summer Camp in June 2025. See <i>Summer Camp Expenses</i> line under Religious Exploration.
44000 · Endowment Disbursement		
46000 · Facilities Donations		
	46100 · Facilities Use Donations	Includes donation agreement with CHOMP for parking lot project providing non-holiday weekday parking at \$250 per day through at least December 2024.
47000 · Miscellaneous Income		
	47100 · Art Sales	Proceeds and donations from art sales cannot be reliably forecasted.
	47200 · Miscellaneous Income	No significant miscellaneous income is anticipated.
48000 · Other Income & Disbursements		
	48200 · Reserve Funding Disbursements	
	48201 · Intern Funding Disbursement	Since there will be no intern minister this year, no distributions are being made through this account.
	48207 · Operating Surplus Disbursement	A distribution of surplus operating funds primarily accumulated by annual net operating income and approved by the Board of Trustees are recorded on this line. [For the prior 2023-2024 fiscal year, a distribution of \$132,000 in church surplus operating reserve funds was required to supplement pledges, donations, and other fundraising income to achieve a balanced operating plan budget.]
	48208 · Big Gift #3 Disbursement	Allocation of a portion of restricted funds from a generous donation ("Big Gift #3") directed by the anonymous donor to be used to offset up to 16.7% (0.25 FTE) of certain of the ministers' compensation and benefits expenses to permit the church to maintain the ministerial commitment at a level of 1.5 full-time equivalents (FTEs).

Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Expenses		
Category	Sub-Category	Comments & Notes
	Account	
	Sub-Account	
Operations		
50000 · Administration		
	50500 · Bank Service Charges	Account maintenance, stop payments (\$30 each), deposit insufficient funds (\$12 each), and transfer fees paid to Mechanics Bank.
	50510 · E-Giving Service Charges	Transaction fees incurred for debit and credit cards and text-to-give transactions not offset by donors for donations and pledges.
	51000 · Communications	
	51100 · Advertising	Includes \$26.50 (\$29 starting in January) for <i>MailChimp</i> email management system, for Craigs List for various job recruiting ads, and for <i>Monterey County Weekly display ads</i> . Also includes \$700 in spring for advertising UUCMP Summer Camp for June 2025.
	51200 · Comcast Business Services	Extended <i>Comcast</i> business internet service contract at \$144.92.
	51300 · Phone System	Includes \$85.50 for telephone service with <i>Telco Automation</i> anticipated to rise to \$94/month in January.
	51400 · Web Site	For September, includes \$120 for Akismet Pro anti-spam license, \$87 for WordPress BackItUp annual fee, and \$119 for WordFence Premium license (WordPress security plug-in). Also includes \$430 to <i>InMotionHosting</i> for website hosting and \$165 to <i>Byte Technology</i> for Prograde SSL Certificate, both in October, and \$150 for a WordPress annual license fee and \$165 for WP Staging Pro WordPress backup plugin, both in May.
	51500 · Captioning Systems	Invoicing from <i>Caption Pros</i> for captioning during the service on Sundays runs \$170/week. Also provides \$20/week for Spanish translation by Google/Caption Pros of each worship service.
	52000 · Postage & Shipping	
	52100 · Postage & Shipping	Includes \$50/mo. for routine mail and monthly newsletters, \$25 for auction materials in October, \$60 for mailing canvass materials in February, and \$136 for each pledge-statement mailing (December and June) and for a year-end statement mailing in January. Use of electronic delivery of various church-related materials is aggressively encouraged to reduce postage costs.
	53000 · Office Expense	
	53100 · Computers	Includes \$200 quarterly for periodic computer servicing of three office workstations, the DRE's laptop, and two A/V laptops.
	53200 · Software	Includes monthly allotments of \$80 for Breeze Church Management System software license , \$22 for Adobe Acrobat Pro, \$20 for Google, and \$15 for QBox. Also includes \$100 for annual MS Office license and \$132 for a Dropbox Plus subscription (Admin) in July, \$220 in August for a Zoom "Business" annual license, and \$52 in March for Tiny Cat library cataloging software annual license fee. Provides \$100 in May for annual website translation service.
	53300 · Office Equipment Rental	The copier lease contract rate is fixed at \$221.11/mo. until August 2026.
	53400 · Office Supplies	General office supply purchases expected to average about \$60/mo.
	53500 · Printing/Reproduction	Monthly contract of \$43.73 for photocopier maintenance and support with <i>Smile/Tri-County Business Systems</i> , plus \$120 per month contingency for excess-copies fees.
	53600 · Administrative Background Screening (Non-RE)	Covers as a contingency the \$108 cost (\$32 CA DoJ + \$17 FBI Fee + \$59 Roll Fee) of one-time state-mandated (AB 506) Live Scan background and fingerprint screening for two new church employees.
54000 · Property Expense		
	54100 · Facility Services	
	54110 · Sexton and Cleaning Services	Includes \$1,288 monthly charge for janitorial services and some sanctuary and church event setup and \$3,000 for semiannual carpet cleaning.
	54120 · Janitorial Supplies	Janitorial and cleaning supplies run approximately \$108/mo.
	54200 · Maintenance/Repair	
	54201 · Interior Maintenance/Repair	Includes estimated expenses for inside maintenance items, including pest control (\$142 per mo.) and septic repairs and service (\$650 per trimester) as well as \$189 per month for painting, plumbing, and kitchen appliance repairs.
	54202 · Exterior Maintenance/Repair	Includes estimated expenses for outside maintenance items such as plumbing and lighting repairs and playground maintenance.

Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Expenses		
Category	Sub-Category	Comments & Notes
	Account	
	Sub-Account	
54300	Property Systems / Taxes / Insurance	
	54310 · Sound System/Video Equipment	Includes an annual fall audio/visual tune-up and preventive maintenance servicing by <i>Independent Audio of the Monterey Peninsula</i> .
	54320 · Fire Systems	Includes \$180 quarterly fire-sprinkler-system-monitoring fee along with the \$235 annual fire alarm test charge by <i>All-Safe Integrated Systems</i> and the \$530 for an annual fire extinguisher service by <i>Carlson's Fire and Safety Sales &amp; Service</i> , both in January. Also, \$99.07/mo. base billing account charge [increasing to \$109(e) in January] for the second <i>California American Water</i> account required for wet fire sprinkler system connection.
	54330 · Property Taxes	Monterey County property taxes in two installment of \$130 (008-141-002-000) in each of October 2024 and February 2025.
	54340 · Property/Liability Insurance	Anticipates a 15% increase over 2023-2024 actual premium costs for liability insurance coverage through Great American Insurance and for church multiple-peril property insurance through the California Fair Plan due primarily to fire hazard of the church facilities. The church continually explores the best balance between cost and coverage in the insurance options available.
55000	Utilities Expense	
	55100 · Electric Service	Includes \$28.46 monthly account charge, about \$40 in potential non-solar consumption, and \$1,000 for estimated <i>Central Coast Community Energy</i> true-up assessment for non-solar electricity grid consumption which may be applied in January 2025. <i>(Electricity-generation and -usage charges have been high recently due to solar-array production mechanical issues and are now being resolved.)</i>
	55150 · Solar System Repairs and Maintenance	Account for tracking repair and maintenance expenses of the church's solar system electric plant. <i>No budget allocation made.</i>
	55200 · Gas Service	Estimated natural gas expenses based on historical PG&E billing.
	55300 · Waste Management Service	Estimated waste disposal expenses based on historical <i>Waste Management</i> quarterly billing and anticipated January fee increase.
	55400 · Water Service	Includes current \$79.09 base account billing charge for <i>California American Water</i> as backup service to church water well service. Anticipated fee increase to \$87 in January 2025.
	55450 · Well Monitoring & Repair	Covers \$300 monthly maintenance charge and \$100/mo. in periodic invoicing by <i>Cypress Water Company</i> for monitoring, repairing, and maintaining the church's water well system, plus \$300 for testing for the mandatory Monterey County water-well permit in June.
57000	Professional Fees	
	57100 · Payroll Service Fees	Covers the \$99.25 (expected to jump to \$109.18 in October) bi-weekly processing fee to <i>ADP</i> , our payroll vendor, and \$120 charge for annual production and filing of IRS Form W-2s.
	57300 · Legal Fees	Church legal expenses; none are anticipated.
	57400 · Accounting Services	Expenses for bookkeeping services + a contingency allocation of \$1,000 for semiannual professional accounting consultation.
	57500 · Licenses and Permits	Includes \$20 for the California Secretary of State annual filing fee (September), the \$2,300 Monterey County Health Department Annual Water System Health Permit fee (June), the <i>Aguajito Property Owners Association</i> membership dues, and occasional liquor-serving permits as required.
58000	Contingencies and Miscellaneous	
	58100 · Contingency Reserve	Contingency fees for tree and storm maintenance, sewer emergencies, and other unexpected events requiring financial outlay. <i>(Now retired, Brian Jacobson recommended setting aside up to \$20,000 for tree management.)</i>
	58200 · Miscellaneous Expenses	No material Miscellaneous Expenses are anticipated in fiscal year 2024-2025.
	58300 · Capital Replacement Revolving Reserve	Separate budget allocation made to cover the cost of replacement of <u>capital</u> equipment that fails or reaches the end of its useable life each fiscal year. <i>No allocation made this year or last year.</i>

Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Expenses		
Category	Sub-Category	Comments & Notes
	Account	
	Sub-Account	
60000 · PROGRAMS/COMMITTEES		
60100 · Communications		Includes \$143 in July for annual "Social Media Toolbox" subscription from <i>Soul Matters</i> and funding for increased signage as well as banners, posters, and logo wear for community events. Support is also included for outreach promotion of church events.
60201 · UUA Annual Program Fund Support		The <i>UUA Annual Program Fund</i> is a program support payment to <i>Unitarian Universalist Association (UUA)</i> in an amount determined annually using a geographic location and cost-of-living and a percentage-of-budget assessment-formula and is paid monthly.
60300 · Leadership Development		
	60301 · Board Visioning	
	60302 · Strategic & Long-Term Planning Initiative	Includes a \$5,000 board-controlled allocation for unbudgeted expenses related to initiatives from the church's new strategic plan.
	60320 · Leadership Training & Development	Funds to defray registration expenses for the 2025 General Assembly in Baltimore and for leadership training workshops may come from the board's strategic plan funding.
61000 · Lifelong Learning		
	61100 · Life Enrichment	Covers \$130 in July for part of <i>Soul Matters</i> subscription for Chalice Circles (1/4 of the cost shared with the Worship Associates and Religious Exploration) and the cost of light food and reference materials for the adult series of Life Enrichment programs.
	61300 · Religious Exploration	
	61310 · RE Supplies	Includes \$100 per mo. (+ added \$200 in August, \$300 In November, and \$300 in May) for classroom crafts, office products, room décor items, baby-care supplies, and nursery toys for the RE year.
	61315 · RE Curricula	Expenses related to acquisition of Religious Exploration course curricula, including \$120 in July for <i>Soul Matters</i> subscription (1/4 of the cost shared with the Worship Associates and Life Enrichment).
	61320 · RE Training	Includes \$300 for supplies and food for in-house RE-wide teacher training orientation session at reopening.
	61330 · RE Travel	Chaperone expenses for three district retreats and travel expenses for three teachers to participate in facilitator certification training.
	61341 · RE Food	Includes kids' snacks every Sunday, meals for youth at fall and spring overnight events, and entrees for four family potlucks.
	61351 · RE Background Screening	Covers the \$74 cost (\$15 FBI Fee + \$59 Roll Fee) of one-time state-mandated (AB 506) Live Scan background and fingerprint screening for four new church <i>volunteers</i> who has direct contact with, or supervision of, children for more than 32 hours a year.
	RE Summer Camp Expenses	Materials and supplies expenses (exclusive of staffing costs and advertising) related to Summer Camp 2025.
	61360 · RE Recognition/Appreciation	Celebration and recognition for OWL, COA, or Bridging Seniors and their families and a year-end teacher luncheon and token appreciation gifts.
62000 · Congregational Life		
	62100 · Membership	Includes \$200 for expenses associated with two UU newcomer orientation sessions and \$275 for a new-member joining ceremony in May, and \$75 for each of two other potluck events sponsored by the Membership Committee. Also provides \$300 for producing or acquiring newcomer brochures and \$300 for <i>Faith Forward</i> subscription.
	62300 · Caring Network	Includes greeting, birthday, and get-well cards; postage; and supplies for Caring Network table. Also \$200 for simple refreshments for church memorial services.
	62400 · Building & Grounds	
	62410 · B & G Inside Improvements	For tracking interior improvements to church facilities, including, for example, furniture, seat cushions, signage and bulletin boards, new window treatments, additional fixtures, and apartment improvements.
	62420 · B & G Outside Improvements	Includes \$4,000 or exterior improvements to church facilities, including, for example, new plants and trees, additional planters and fixtures, and additional hardscape, including possible enhancements to the fence at the top edge of the new sanctuary foundation.

Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Expenses		
Category	Sub-Category	Comments & Notes
	Account	
	Sub-Account	
62500	Events and Fellowship	Includes \$65/service for coffee and supplies for Sunday services, \$200 for Program Council Committee Fair (September), \$300 fee for Christian Video Licensing International (CVLI) for movies and videos (November), \$100 to <i>CHOMP</i> for annual AED training (February), and \$120 for UU World congregation bulk subscription (April).
63000	Social Justice	
63100	Social Justice Outreach	Includes \$100 for the Peace Coalition of Monterey County and other local organizations. Also provides \$500 for <i>Pasta With the Pastors</i> tickets and \$500 for food assistance for <i>I-Help Men</i> and <i>I-Help Women</i> .
63105	COPA Membership	Funding of \$2,000 for the voluntary annual membership for <i>Communities Organized for Relational Power in Action (COPA)</i> as part of the church's commitment to the sanctuary movement.
64000	Worship	
64100	Music Programs	
64110	Music Equipment	Includes \$250 for semi-annual piano tuning service for each of two pianos.
64120	Music Supplies	Allocates \$2,680 for purchasing new sheet music and hymnals for the church's choir and instrumental performances for Sunday services as well as \$465 for <i>One License Annual</i> Music License Renewal Fee in January and \$320 for <i>CCS PerformMusic Annual License Fee</i> in March.
64130	Musicians--Occasional	Provides for guest musical soloists at church services and special musical programs during the holidays.
64140	Choir Enrichment Activities	No allocation made this year for enrichment and community building activities for active choir members.
64200	Worship Expenses	
64220	Guest Worship Speaker Expenses	For honoraria and limited travel-expense reimbursements for worship guest speakers, primarily for summer (July 2024 and June 2025), and \$132 for a Dropbox Plus subscription (Worship) in March.
64230	Worship Supplies	Includes \$144 for occasional worship supplies, \$360 for <i>CCS WorshipCast Annual License Fee</i> in March, and \$240 in July for <i>Soul Matters</i> subscription (half of the cost shared with RE and Life Enrichment).
65000	Stewardship & Fundraising Expenses	
65100	Stewardship	Provides \$1,000 for costs associated with the 2025-2026 canvass pledge campaign kickoff recognition and for printing and materials.
65300	Cultural Events Expenses	Includes cultural-event staging costs intended to be offset by Cultural Events income.
65400	Annual Service Auction Expenses	Expenses associated with conducting the annual church service fundraising auction, including \$385 Auctria auction software in April, \$75 for fixtures and decorations, \$100 child care, and \$325 for online payment transaction fees.
65500	Super Flea Expenses	Includes \$150 for Super Flea-staging costs and credit card transaction fees.
65600	Equal Exchange Expenses	Cost of goods sold and promotion for Equal Exchange.
65700	Endowment Expenses	Includes up to \$600 for acquiring and engraving donation recognition blocks or bricks.
68000	Finance Committee Expenses	For any Finance Committee expenses incurred; none are anticipated this year.

Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Expenses		
Category	Sub-Category	Comments & Notes
	Account	
	Sub-Account	
<b>70000 · Employee Expenses</b>		
71000 · Staff Benefits		
	71600 · Workers Compensation Insurance	Represents estimated annual premium charges for <i>Travelers Insurance Company</i> through <i>ADP Insurance Agency (ADPIA)</i> .
72000 · Payroll		
	72100 · Minister Pay & Benefits	
	72101 · Minister Housing Allowance	<i>Per the Ministerial Compensation Recommendations from Personnel Committee.</i>
	72102 · Minister Bonus	
	72103 · Minister Salary	
	72104 · Minister Professional Expenses	
	72106 · Minister Benefits	
	72107 · Minister Retirement Contribution	
	72108 · Medical Insurance	
	72109 · In-Lieu of FICA/Medicare 7.65% (Base Cap)	
	72111 · Dental Insurance	
	72113 · Life & AD&D Insurance	
	72114 · LTD Insurance	
	72150 · Intern Minister	
	72151 · Intern Minister Compensation	<i>Since there will be no intern minister this year, there are no payroll expenses being budgeted for these line items.</i>
	72155 · Intern Minister Professional Expenses	
	72200 · RE Employees	
	72210 · RE Director	<i>Per Staff Compensation Recommendations from Personnel Committee.</i>
	72211 · DRE Retirement Contribution	
	72212 · DRE Medical Insurance	
	72213 · DRE Life & AD&D Insurance	
	72215 · DRE LTD Insurance	
	72215 · DRE Professional Expenses	
	72216 · DRE Dental Insurance	
	Summer Camp Director [ <i>Stipend Only</i> ]	
	72220 · RE Team Member	
	72300 · Music Employees	
	72310 · Music Director	<i>Per Staff Compensation Recommendations from Personnel Committee.</i>
	72311 · Music Director Retirement Contribution	
	72312 · Music Director Medical Insurance	
	72313 · Music Director Life & AD&D Insurance	
	72314 · Music Director LTD Insurance	
	72315 · Music Director Professional Expense	
	72316 · Music Director Dental Insurance	
	73224 · Music Director Bonus	
	72320 · Staff Accompanist	Payroll compensation for staff accompaniment for choir rehearsals, Sunday services, and Christmas performances.



Congregation: Comments and Notes for Proposed 2024-2025 Operating Budget

Expenses		
Category	Sub-Category	Comments & Notes
	Account	
	Sub-Account	
72400	Administrative Employees	
	72410 · Administrator	Per Staff Compensation Recommendations from Personnel Committee.
	72411 · Administrator Retirement Contribution	
	72412 · Administrator LTD Insurance	
	72413 · Administrator Life & AD&D Insurance	
	72414 · Administrator Bonus	
	72415 · Admin Professional Expense	
	72420 · Office Assistant	Per Staff Compensation Recommendations from Personnel Committee.
	72421 · Office Assistant Life & AD&D Insurance	
	72422 · Office Assistant LTD Insurance	
	72423 · Office Assistant Retirement Contribution	
	72425 · Other Office Assistance	
	72430 · Set-Up Assistance	No payroll expenses for additional office assistance are anticipated this fiscal year.
	72431 · Videography Team	Payroll expenses for set up assistance.
		Payroll expenses for church videography team coordinating and producing media for the hybrid church services.
72500	Payroll - Other	As in past years, no net "Payroll - Other" expenses are anticipated in the 2024-2025 fiscal year.
73000	Payroll Taxes	Category to track statutory payroll tax expenses related to compensation.

## Staff Reports

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### Ministers' Report

Co-ministers Revs. Elaine & Axel Gehrmann

### 9 Years

It is hard to believe but this is the ninth year we have been privileged to serve as your co-ministers – and it has been **another busy and eventful year!** Attendance and energy is up, new groups have formed, and the church is a happy bustling place.

After more than two years of hybrid services, **four-fifths of our worship attendees are in person**, and the sanctuary is once again often full-to-overflowing. We added Spanish language closed captioning for our worship services, and made our website available in 12 languages in addition to English.

### Staff & Transitions

We love having **Jorge Torrez** as our Music Director. His terrific musical talents, his creativity and his great ability to select music that supports and enhances the worship themes are all much appreciated. The choir sounds terrific under his guidance, and his warm and collaborative personality and style are a terrific fit for our congregation. And we are also grateful for the ongoing exceptional musical contributions of our amazing accompanist, **Lucy Faridany**, whose beautiful selections never fail to captivate and transport us!

In August **Elizabeth Granado**, our Director of Exploration, resigned, moving to Texas with her young daughter to be closer to family. We were fortunate to have **Sharyn Routh** take on leadership of our RE program, initially as Acting DRE, as she had done during Elizabeth's maternity leave, and now as settled/regular DRE. Sharyn has done a wonderful job with our RE program and launched a number of new events and initiatives, including a Young Adult group. We greatly appreciate her collaborative approach and her helpful suggestions about many areas of church life, including outreach, organization, publicity, and social media.

Our Sunday morning "Tech Team" has kept our multiplatform worship services running smoothly and consistently! The team includes **Alex Parra**, **Alberto Vazquez**, and **Axel Duarte**. We remain enormously grateful to **Fred Hamilton**, for all his expertise and assistance, designing and helping maintain our tech set up!

**Ray Krise** continued his great work as our Church Administrator, serving with grace and competence, until his well-deserved retirement at the end of March. We feel very fortunate to have found **Amy Razzak** to serve as our new Church Administrator, and after only a few weeks on the job we are very impressed with her skills and her command of the tasks required, as well as her friendly, helpful demeanor.

**Karina Briseno** has continued to serve us extremely well as our Office Assistant and Website/social media guru, distributing weekly and monthly communications, updating our website, database and assisting with other key communications and social media postings.

## **Finances**

This year the Board made a concerted effort to move UUCMP towards a **more sustainable financial situation**. In order to balance the 2023-2024 operating budget, an amount from excess operating reserves that had accumulated over recent years was included as an income source, however it is looking like much of these funds may not be needed for this fiscal year.

The Fundraising Committee conducted several successful fundraising events, including the **Covid Angels challenge**, the **Holly Near concert**, and finally a **Matching Pledge challenge**.

The Board set a very ambitious goal of trying to increase the pledge amount by 25% overall, and the Stewardship committee worked very hard to get the message out, and the congregation responded. We are so thankful to everyone who contributed to our pledge campaign. Every amount is valued and appreciated, and enables us to carry out our mission!

We are incredibly grateful for the efforts of our **Stewardship Committee**, under the incomparable leadership of Konny Murray, and with the aid of many stewards, testimonial givers, and pledge follow-uppers. Thanks to their good work, this year's annual pledge drive saw a substantial increase in pledged contributions. Thanks to the generosity of our members and friends, the proposed budget for 2024-25 does not draw anything from our excess reserve funds.

## **A Productive Year**

This year was very successful, with many new activities involving more people. Several new groups have formed, including a Movie Lovers Group, a Hiking Group, a Young Adult Group, a Venturing Crew 212, and a Makers group.

Currently, most staff meetings, Board meetings, and several committee meetings and classes are still conducted via **Zoom** or **Hybrid meetings**. These make meetings more accessible to a greater variety of participants. However, facilitating equal participation and engagement, while managing the technological challenges of computers and audio/visual equipment, and being attentive to interpersonal needs and dynamics, is still quite an undertaking.

The church switched to a new Database management system, and thanks to untold countless hours of research, set-up, and data input by the very impressive **Steve Johnson**, we have a new, easy to use, accurate database of UUCMP members and friends.

It is impossible to convey **all of the worthwhile events** and activities that have taken place at UUCMP this past year. But we would like to highlight just five experiences that we remember fondly and appreciatively:

We are grateful that we once again held our **Annual All Church Campout** at Santa Lucia campground in Big Sur in August. We had a great turnout, and managed to switch to an online registration system. (With special thanks as always to **Kerry Sisseem**, our camp coordinator extraordinaire, who helped us to organize and share the tasks!)

The **Super Flea Sale** was held once again, allowing many people to repurpose their gently used items, raising funds for the church and providing many people with new treasures. Special thanks to **Mibs McCarthy** for her leadership and the many volunteers who made the sale such a success.

We are grateful for our **new Strategic Plan**, which began with an all-church Imagination & Sharing workshop in September, facilitated in person by our UUA regional field staff, **Annie Scott**. The **Strategic Planning Task Force (SPTF)** then took the information generated at the workshop, and surveyed the congregation as to their priorities. We continued to gather input, including actual and virtual “buckets” for idea collection. In January, the SPTF held a workshop after church, in which members and friends could further refine their visions, and commit to supporting differing action steps to support the visions. And then the SPTF collected the data gathered into the Strategic Plan format, and in consultation with the board through several iterations, produced the final version that is to be voted on at the Annual Meeting. We are thankful to the many members and friends who contributed their ideas and suggestions, to create this grassroots, bottom-up plan to focus our energies for the next three years on: fortifying and enhancing our Religious Exploration programs, our outreach to new people, and our involvement of members and friends.

The annual **Service Auction**, with its theme of “Under the Sea” was a big success, with many wonderful items in the online silent auction, and a fantastic live auction event, with food, costumes and lots of fun!

And finally, we are extremely grateful for the extraordinary efforts of the Finance Committee, Stewardship Committee, Fundraising Committee, and Board of Trustees, who spent countless hours in discussing and analyzing our **church finances**, and strategizing ways to fund our many church programs, and building and staffing needs.

### **Ministerial Duties**

The two of us have continued to divide **various areas of church life**, with one of us serving as primary ministerial liaison to each. Elaine has again been serving as the ministerial liaison to: Program Council, Leadership/ Nominating, Building & Grounds, Social Justice, Personnel, Intern Committee, Communications, Auction Committee, Strategic Planning Task Force, and Inclusion Task Force. Axel has been the ministerial liaison to: Membership, Finance, Stewardship, Life Enrichment, Family Ministry, Caring Network, and Music, and has provided leadership for our Pastoral Associates and Chalice Circles. We have both been equally involved in our work with: Board of Trustees, Committee on Ministry, Worship Associates, and staff supervision.

As contributions to our **Life Enrichment** programs, Axel led a 6-session discussion of “On Repentance and Repair,” by Danya Ruttenberg, which was the UUA Common Read. Elaine co-led a 3-session discussion of “The Future We Choose” by Christiana Figueres and Tom Rivett-Carnac. In conjunction with the local group Whites for Racial Equity, Elaine has led/hosted several Anti-Racism Book & Film discussions.

**In the larger community**, Elaine has continued her work as member of the chaplain team at CSUMB, going to campus weekly, and as Board member of the local chapter of the ACLU. And she continues to support the local NAACP branch, and be involved with Whites for Racial Equity. Axel continued to serve as a part-time chaplain at Pacific Grove Senior Living (formerly Forest Hill Retirement Community), and when that position was eliminated in February 2024, he accepted the part-time position of Director of Spiritual Services at Canterbury Woods Senior Community in Pacific Grove.

We have been conducting a single multi-platform Sunday **worship service** at 10:30 a.m. Sunday worship attendance this year (from April 1, 2020 to March 31, 2021) has averaged 22.6 devices on Zoom, and 88.4 in-person participants. This brings the average number of worship attendees back to our pre-pandemic level.

Sadly, our congregation suffered several **losses** this year. We will miss Sue Ellen Stringer, Regina Liske, and Gene Anderson. Since April 1 of last year 21 **new members** have joined the church. In January the official membership figure submitted to the UUA was 208 (up from last year’s 196).

We have continued to be actively involved in **district, regional and denominational activities**. We attended the June 2023 UUA General Assembly and UUMA Ministry Days in Pittsburgh, and the Pacific Central District UU ministers’ gatherings in October 2023 and March 2024. Elaine attended the Pacific Western Region Regional Assembly virtually in April 2024. We will attend this year’s UUMA Ministry Days and UUA General Assembly virtually, in June. We were very pleased to participate in the **Ordination Ceremony** of our former Intern and Sabbatical Minister Rev. Susan Panttaja.

We continue to meet monthly with our closest UU colleague, Rev. Russ Menk who recently retired from the UUSCC in Aptos, and his wife Jackie, who is our bookkeeper. To support our **professional development**, Elaine has been attending the latest round of Beloved Conversations virtually, and several Bowen Family Systems Theory virtual conferences.

Looking back on the past year, we are filled with **a sense of gratitude** and admiration for the spirit, the generosity, the energy, the resilience, and the commitment of all of you-- our Board and committee members, active volunteers, as well as dedicated staff members.

We are looking forward to another exciting year, and working to help **implement the new Strategic Plan**.

## Sunday Services

### May 2023 Theme: Creativity

May 7	The Creative Process (followed by Annual Meeting)	Rev. Axel & Micah Forstein
May 14	Creative Parenting	Rev. Elaine & Corey Brunson
May 21	Celebrating Religious Creativity and Exploration	Rev. Axel & Elizabeth Granado
May 28	Co-creating the Universe	Ray Krise & Bjorn Nilson

### June 2023 Theme: Delight

June 4	Dimensions of Delight	Rev. Axel, Page Galloway & Christina Zaro
June 11	We Are One - A Delightful Music Sunday	Rev. Elaine & Jorge Torrez, Lucy Faridany & Choir
June 18	The Delight of Dad Jokes	Rev. Axel & Micah Forstein
June 25	Spiritual Leadership	Rev. Joanna Daum, Ann Jacobson & Corey Brunson

### July 2023 Theme: No Theme

July 2	Steps on The Path: A Tour and a Call to Action	Brian Jacobson & Lauren Keenan
July 9	UUA General Assembly 2023 Worship Service	Lauren Keenan & Mibs McCarthy
July 16	The Future of Religion and Unitarian Universalism	Micah Forstein & Ray Krise
July 23	Hope and Trust: In Conflict or in Accord?	Jon Czarnecki, Robin Jensen & Corey Brunson
July 30	The Stories We Tell Ourselves	Shannon Morrison, Ann Jacobson & Maren Martin

### August 2023 Theme: No Theme

August 6	Summer Memories	Lauren Keenan & Christina Zaro
August 13	Human Connection in a Digital World	Fletcher Brunson, Jill Marshall & Sam Prichard
August 20	Water Communion	Revs. Axel & Elaine & Elizabeth Granado
August 27	Camp Out!	Revs. Elaine & Axel, Lauren Keenan, Kathleen Craig & Celia Barberena

### September 2023 Theme: Hospitality

September 3	Radical Hospitality	Rev. Axel & Page Galloway
September 10	Building Bridges: Welcoming Those With Whom We Disagree	Rev. Elaine & Christina Zaro
September 17	An Invitation to Innovation	Rev. Axel & Annie Scott
September 24	World Wide Welcome	Micah Forstein, Bjorn Nilson & Ray Krise

**October 2023 Theme: Heritage**

October 1	Finding Your Best Place	Rev. Elaine & Kathleen Sullivan
October 8	Cherishing Our Challenging Heritage	Rev. Axel & Corey Brunson
October 15	Heritages We Embrace	Rev. Elaine & Ann Jacobson
October 22	Our Religious Histories	Rev. Axel & Shannon Morrison
October 29	Am I My Mother's Daughter or My Father's Daughter?	Celia Barberena & Kathleen Sullivan

**November 2023 Theme: Generosity**

November 5	Radical Tzedakah	Rev. Elaine & Micah Forstein
November 12	Our Challenging Charitable Choices	Rev. Axel & Bjorn Nilson
November 19	Mindfully Sharing Our Planet"	Rev. Elaine & Lauren Keenan
November 26	It Is More Blessed to Give Than to Receive - Really?	Christina Zaro & Ray Krise

**December 2023 Theme: Mystery**

December 4	Holiday Mysteries	Rev. Axel & Celia Barberena
December 11	The Snow Tree – A Service for All Ages	Sharyn Routh & Rev. Axel
December 18	Winter Lights - Music Sunday	Rev. Elaine & Jorge Torrez
December 24	Christmas Eve Candlelight Service	Revs. Axel & Elaine, Ray Krise & Robin Jensen
December 31	Do Miracles Exist?	Bjorn Nilson & Kathleen Sullivan

**January 2024 Theme: Liberating Love**

January 7	Love Will Set Us Free	Rev. Elaine & Ray Krise
January 14	Of Dreams and Dreamers	Revs. Axel & Celia Barberena
January 21	A Small Act of Love Can Liberate a Life	Rev. Elaine & Max Cajar
January 28	We Live In Hope	Fletcher Brunson, Jillian Marshall & Corey Brunson

**February 2024 Theme: Justice & Equity**

February 4	Do You Hear the People Sing?	Rev. Elaine & Christina Zaro
February 11	Fair Play in the Game of Life	Rev. Axel & Lauren Keenan
February 18	Be the Light	Rev. Elaine & Bjorn Nilson
February 25	The Religious Ground of Justice	Ray Krise & Shannon Morrison

**March 2024 Theme: Transformation**

March 3	The Courage to Change	Rev. Axel & Max Cajar
March 10	Relishing the Goo	Rev. Elaine & Ann Johnson
March 17	Coping With Change	Rev. Axel & Page Galloway
March 24	The Slow Process of Instant Change	Rev. Susan Panttaja & Ray Krise
March 31	Radical Resurrections	Rev. Elaine & Corey Brunson

**April 2024 Theme: Interdependence**

April 7	This Dance We Do	Rev. Axel & Celia Barberena
April 14	You Say Potato...	Rev. Elaine & Christina Zaro
April 21	At Home in the Natural World	Rev. Axel & Ann Johnson
April 28	On Optimism for Radical Regeneration	Suzy Worcester, Lauren Keenan & Shannon Morrison

## **Church Administrator's Report**

Amy Razzak, Administrator, reporting  
Karina Briseno, Office Assistant

I took over as Church Administrator on April 1, 2024. I had the pleasure of shadowing Ray Krise in his final few weeks on the job which I greatly enjoyed.

While I cannot reflect on the year in review, I can make some comments about what I've seen in the last few weeks:

- UUCMP and the Church Office are busy! There hasn't been a dull moment and I've stayed busy on many fronts including:
  - Maintaining and updating the church calendar
  - Monthly Board Packet preparation
  - Directing the flow of invoices and deposits
  - Distributing Shared Offering donations to recipients
  - Writing the weekly Welcome Script for Services
  - Making sure we have coffee on Sundays!
- Our office assistant, Karina Briseno, stays very busy and is actively involved in all our forward-facing member communications. Some of her roles include but are not limited to:
  - Updating the website, including weekly service information
  - Creating and distributing the electronic weekly news
  - Distributing our monthly newsletter, electronic and hard copy
  - Adding and updating members in our membership database, Breeze
  - Posting to social media accounts, Facebook and Instagram
  - Distributing the weekly Order of Service

In the interactions I've had with church staff and volunteers, everyone has been very kind, open and welcoming. I truly appreciate it.

I look forward to the year ahead and supporting the administrative needs of UUCMP. Please reach out any time!



## **Director of Religious Exploration's Report**

Sharyn Routh, Director

The past year was busy in the world of Religious Exploration! Sharyn Routh took over as Acting DRE in August 2023 when Elizabeth Granado moved out of state, two Our Whole Lives classes took place at UUCMP: one class for 5th/6th graders in the fall and another class for 7th/8th graders in the fall/spring, and we continued providing our RE programs and enrichment throughout the year. Other highlights included the completion of the Emerson Room redecoration by UUCMP Eagle Scout Jill Marshall, the Big Sur Campout in the fall, the "Snow Tree" holiday pageant, a Gingerbread House making event, updating the RE library, and transitioning RE registration/attendance to the new Breeze database system.

### **Summer 2023 Session**

Throughout the months of July, August, and the first weekend of September, RE classes were combined into an all-ages class that used the Can-Do Summer curriculum developed by the Soul Matters team. Activities focused on creative, hands-on activities such as making sculptures out of recyclables and creating an obstacle course in which kids earned points for encouraging each other and teamwork.

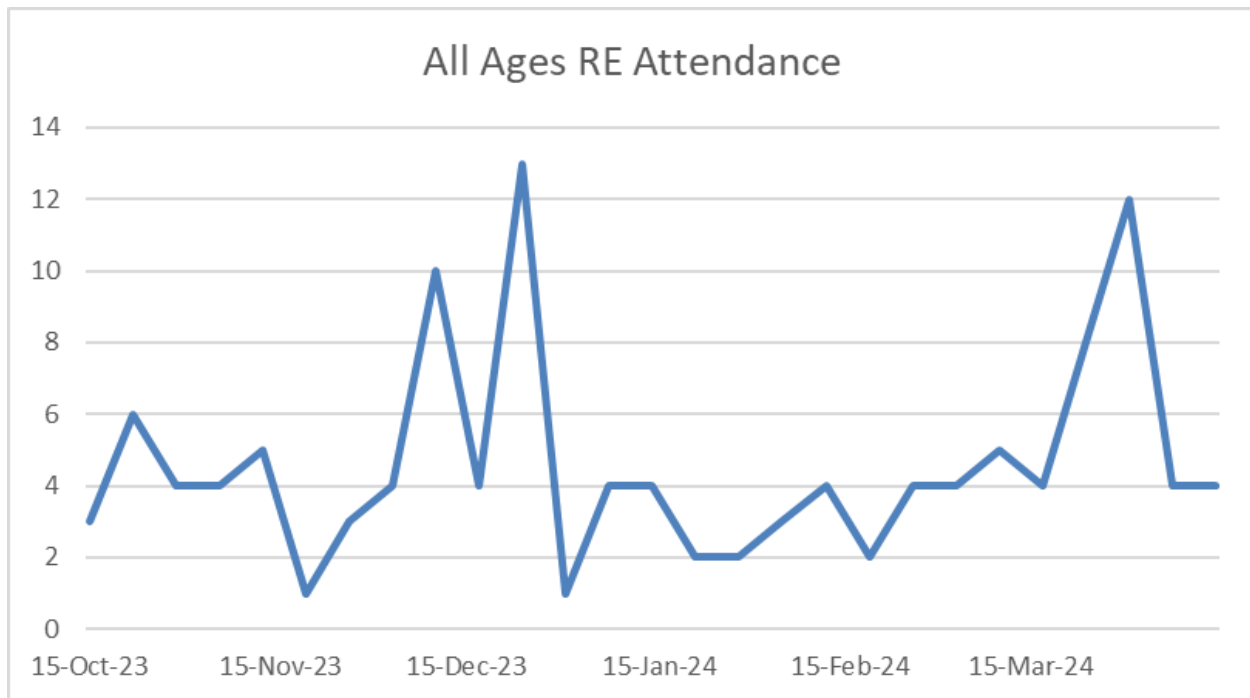
### **Fall 2023- Spring 2024 Session**

Our all-ages RE class focused on the Soul Matters monthly themes for the fall and spring, with some extras added in by the RE teachers to help kids learn more about world religions. The monthly themes included Welcome, Heritage, Generosity, Mystery, Liberating Love, Justice & Equity, Transformation, Interdependence, Pluralism, and Renewal. The kids' RE class often read a story and created a craft related to the theme. Some of the kids' class activities included connecting the newly proposed Article II core values with the 8 UU Principles, making bracelets that spelled out the kids' favorite core value(s), acting out a skit about the Good Samaritan, making homemade holiday cards for homebound and elderly church members, decorating heart magnets and discussing how liberating love is a kind of love that acts like a magnet and pulls us toward action, making signs to carry in the MLK march / display at home, making Valentine's Day cards for the Monterey County Alliance on Aging, scavenger hunting for hidden clues about Black inventors and their inventions in honor of Black history month, and making seed mosaics. The kids' class also learned about the Pagan holiday of Samhain, the Hindu holidays of Diwali and Holi, the Jewish holiday of Tu B'shevat, the Muslim holiday of Ramadan, and put together care packages for the I-HELP men in March as a way to show love to our community.

## Attendance in RE Classes

Although RE initially started the fall with two classes – one elementary class and one middle school class, by October 2023, we decided to combine the classes into a “one-room schoolhouse” all-ages RE class. We had originally anticipated that RE attendance might increase due to OWL classes being after church. However, we found that attending both RE and OWL made for a very long day for some kids, and so most of our UUCMP kids only attended OWL classes, and not RE classes. OWL classes also affected siblings’ attendance, as parents did not bring one child to RE and then go home to bring the 2nd child back to church for OWL. Although alternative scheduling for OWL was discussed prior to deciding to hold classes on Sunday afternoons, consistent OWL teacher availability was not possible at any other time. Providing OWL was prioritized due to community outreach possibilities with the program as well as teens’ need for OWL education after its absence during the pandemic.

RE Attendance varied greatly depending on school vacations, holidays, and OWL class schedules. On some Sundays, only the two children of the DRE attended. On other Sundays, such as the holiday pageant in December and Easter Sunday in March, there were 14 and 17 children attending respectively. We had a handful of children who attended regularly, with an average of 4 kids in the all-ages RE class and 1 child in the nursery. While the classes are small, the children who regularly attend are happy to see each other and do activities!



## **Staff and Volunteers**

Sharyn Routh became the Acting DRE again in August 2023 after previously acting as the DRE during Elizabeth Granado's parental leave in early 2023. Sharyn continued to teach the children's RE class, as she had previously before becoming acting DRE.

In September, two paid nursery caretakers (Diana Speraw and Leah Mack) were hired to staff the nursery, however, Diana left in early November. Leah, a high school senior, continues to help with the nursery and with the RE class when there are no children in the nursery. Rebecca Irwin, who was initially hired as the teens teacher in spring of 2023, continued teaching. She started the year as the middle school RE teacher and then collaborated with Sharyn once the RE classes were combined into an all-ages class.

We are fortunate to have a paid teacher and a nursery caretaker, but we still do rely on our volunteers to help out, and several wonderful people stepped up to the plate to help out! Our volunteers this year who helped with RE classes and the nursery included Warren Finch, Jaya Bajpai, Michelle Finch, Karen Brown, Rose Lovell, Shannon Morrison, and Andrea Rivas. Karen Brown contributed many hours cataloging and maintaining the RE library for the UUCMP community. Corey and Robert Brunson took the lead on coordinating the Venturing Crew and helping with various RE events, activities, and administrative tasks. We had numerous church members donate snacks and supplies for RE events and activities. Several of our paid staff also volunteered their time beyond their regular duties to help ensure the RE program ran smoothly!

## **Special Events**

### **First Friday Game Nights**

Our First Friday Game Night continued monthly in the fireplace room. Andrea Rivas volunteered to be the game host for most months and the ministers attended as well. Although not many families with young kids attend the game nights, they continue to be fun for those who attend.

### **Committee on Family Ministry**

The Committee on Family Ministry continued to meet virtually, as that seemed to work best for parents. A core group of committee members met monthly to brainstorm and plan activities to try and attract new families to UUCMP as well as provide fun for the families who currently attend. The Committee on Family Ministry's goal for this year was to focus efforts on creating more fun opportunities for families to engage with the UUCMP community, as detailed below.

## **Kid-Friendly Activities / Events**

### **Fall 2023**

In August, Corey Brunson, Warren Finch, and Shannon Morrison took the lead in coordinating kids' activities for the camp out. Intergenerational activities included rock painting, t-shirt decorating, a nature scavenger hunt, and creating nature mandalas. The campout attracted families who infrequently attend UUCMP as well as families who are friends with UUCMP members. In September, RE families were invited to drop off items for the Super Flea Market fundraiser at the church that took place on Labor Day weekend. DRE Sharyn organized and priced families' items that covered four tables at the event. Families were happy to donate and support the church. In October, an all ages outing was organized to Earth Bound Farm in Carmel Valley after church and a pumpkin carving party was held at the church prior to Halloween. In November, kids' activities were provided at the Live Service Auction so that parents could attend without needing a babysitter. The Committee on Family Ministry organized snacks, activities, and a showing of The Little Mermaid movie to correspond with the "Under the Sea" theme of the auction. In December, a gingerbread house making party was held in the church kitchen on a Saturday afternoon and a family holiday karaoke and pizza dinner was held on a Saturday evening.

### **Spring 2024**

In February, DRE Sharyn collaborated with the Committee for Social Justice to have kids' activities available after the MLK march for families who stayed for the program (e.g., word searches, heart puzzles, coloring pages, and children's books). The activities were a big hit with children attending the MLK program and were a great way to reach out to local families. In March, RE families helped provide and serve food for the men's I-HELP dinner held at UUCMP on the evening of Easter Sunday. RE families also contributed supplies that kids used to make care bags in the RE class for the men, including Easter candy, protein bars, water bottles, new socks, and homemade cards of encouragement. Families were also invited to a multi-generational outing to an afternoon Monterey Bay FC soccer game at the end of March. In April, families were invited to an all-church Park Day held at Veterans Park in Monterey with games, activities, a cookout for dinner, and campfire program led by the Venturing Crew that meets at UUCMP.

In addition to the activities listed above to foster community among current RE families, DRE Sharyn also hosted a Halloween Party and a Valentine's Day party at the church for toddlers and preschoolers as community outreach. These events attracted six new families into the church building and families enjoyed themselves. However, none of these visitors returned to attend a Sunday service.

As a way to foster community among UUCMP young adults in their 20s, 30s, and 40s, DRE Sharyn helped to coordinate the start of a monthly meetup after church on Sundays. The first several meetups had around 10 young adults attend. The hope is that this group will eventually

become self-sufficient. A Venturing Crew (a scouting troop for emerging adults) was also established this year and meets at the church on Sunday evenings. The Crew serves recently graduated UUCMP members, provides an avenue for young adults to connect with UUCMP, and organizes enrichment activities for the church community (e.g., at Park Day).

### **Multigenerational Services**

The RE community took part in several multigenerational services over the course of the year, including the Water Communion Service that kicked off the start of the RE church year. Elizabeth Granado, Sharyn Routh, Lucille Bajpai, and Meredith Harrill created rainbow keychains that RE kids handed out at the Water Communion Service to church members.

Although it was not a multigenerational service, instead of a traditional “Story for All Ages” for one service in October, RE kids and DRE Sharyn performed a skit that shared information about the heritage and history of Unitarian Universalism for the congregation.

The annual holiday pageant in 2023 focused on the winter solstice and was based on the picture book “The Snow Tree.” The pageant included everyone at church helping to decorate a tree at the front of the sanctuary with nature-related items as part of a story that the kids acted out about animals helping each other. The tree decorated during the pageant stayed on display in the foyer for the remainder of December.

The annual RE Sunday will take place in May, with DRE Sharyn, Rev. Axel and RE kids/teens leading the service, honoring bridging high schoolers, and recognizing the many volunteer contributions that are essential for the RE program to thrive.

### **OWL Classes**

This year we offered two OWL classes – a 5th/6th grade class that met for 10 sessions and a 7th/8th grade class that met for 25 sessions. We had 10 students enrolled in the 7th/8th grade OWL class (3 were UUCMP members) and 13 students in the 5th/6th grade OWL class (3 of whom regularly attended UUCMP). Our dedicated OWL teachers included Warren Finch, Andrea Rivas, and Rebecca Irwin for the 5th/6th grade class, and Edmund Pendleton, JT Mason, and Corey Brunson for the 7th/8th grade class. Rebecca Irwin, Don Reynolds, Christina Zaro and Connie Nadler all helped with the 7th/8th grade class when subs were needed. Corey Brunson also helped to coordinate the OWL orientations and registration. During the fall, we hosted a simultaneous parent discussion group that was optional for any OWL parents who wished to attend, facilitated by Sharyn Routh and Jaya Bajpai. Rev. Axel also visited the last session of the parent group to answer any questions parents had about UU or UUCMP, since most who attended were not UUCMP members.

## **Music Director's Report**

Jorge Torrez, Music Director [consult with Axel]

The UUCMP music department continued serving every service with a variety of musical selections, ensembles, and guest musicians throughout the year. We offered several opportunities for musical participation. Our ensembles included the UUCMP Community Choir and Rodney and Shawn's Jam Session; though, they paused their sessions as there was little to no involvement this year.

### **UUCMP Community Choir**

This year, the choir was featured in several services, including Christmas Eve and Easter Sunday. The choir provided music at the annual winter music Sunday service and will provide a spring music Sunday service in June.

The choir sang various songs during services. Attendees of the choir rehearsals and services included: Be Astengo, Laurie Bulgier, Carol Collin, Warren Finch, Page Galloway, Marty Goldman, Dennis Hamilton, Ann Jacobson, Brian Jacobson, Robin Jensen, Molly Lewis, Mike Lovell, Mibs McCarthy, Deb Miller, Ted Raabe, Andrea Rivas, Helen Shamble, Bud Smith. And we welcomed the following new members: Zeana Bey, Christi Brekke, Gillina Halkola-Bell, Jenny Cattanach, Nan Foster, Carol Galginatis, Jillian Marshall, Lynda Sayre, April Sun, Carolyn Wills

This year's repertoire included, but was not limited to:

*Althouse Homeward Bound, Beck Carry the Light, Brymer Dream On, Brymer Endless Night, Bullock-Wilson Love is the Spirit of This Church, Bullock-Wilson Welcome to Our Circle, Dalglish Great Trees, Emerson Seasons of Love, Farnell Be The Change, Lentz Closer to the Flame, Lightfoot Cantate Hodie, Lojeski I Dreamed a Dream, Moore Ain't Gonna Let Nobody Turn Me Around, Morris Be The Light, Narverud Ad Astra & Sisi Ni Moja, Papoulis Give Us Hope, Podd Over My Head, Spevacek Riu Riu Chiu, Stroope Omnia Sol, Schonberg Do You Hear the People Sing?*

The choir year was in-person all year (and rehearsals were hybrid). This option allowed choir members to continue meeting remotely if they wanted to, and be included in the services irrespective of their personal covid safety precautions or abilities to drive at night.

### **Children's Choir**

Since Camille's departure last year, there wasn't much interest in youth to participate in a Children's Choir. Children's Choir was offered the first few months of this year before Sunday services.

### **Handchime Choir**

Since Camille's departure last year, there wasn't much interest in youth to participate in a Handchime Choir. Handchime Choir was offered the first few months of this year before Sunday services.

### **Sing Along with Shawn**

Shawn's sing a-longs were hosted at his house and not at UUCMP.

### **Jam Session**

Rodney Smith started a casual Jam Session in August with very few participants which soon had no participants at all so Jam Sessions were put on hold until further notice.

### **Guest Musicians**

This year we have hosted several guest musicians to either help support the choir, or to enhance the services with their music. Our relationship with these musicians both enriches our worship while deepening our ties in the larger community. Some are members of the Bach Festival or the Monterey Symphony. Others are freelance musicians from the area, or are talented church members. This year saw a particularly high number of guest musicians because the pandemic services allowed musicians from all over the country to participate with greater ease than they might otherwise. These participants include: Gillian Halkola-Bell, Alyssa Beltran, Rick Chelew, Christi Brekke, Nan Foster, Tammy Hall, Shawn Kraut, Kiefer Taylor, Teruyo Petrocelli, Amanda Jane Ross, Logan Thorstenson, Vanessa Yearsley, Dawn Walker.

### **Other Tasks**

As the Music Director, I am responsible for facilitating music on Sunday mornings. Sometimes this includes serving as the song leader or accompanist in services, other times I will work with singers, guest musicians, or small ensembles outside of our regularly scheduled rehearsal times to learn extra music for services. I also regularly collaborate with the Worship Associates on helping choose hymns, should they need any additional input. I also collaborate with the ministers, the accompanist, and DRE in monthly meetings to support multi-generational services, or other musical needs as they arise.

## Leadership Reports

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### President's Report

Mike Lovell

UUCMP is having a very good year. Attendance and energy levels are up, committees are active, many visitors are becoming members, and our programs are moving forward with enthusiasm. Our worship experience continues to be meaningful with worship associates and ministers working to bring us messages that inspire and challenge. We have also installed a new database system, Breeze, to help us better keep track of our membership information (thank you Steve Johnson.)

Many members participated in our Strategic Planning process through our Imagination Gathering, survey, and follow up gathering. A task force organized, prioritized, and communicated this information to the Board of Trustees, eventually resulting in a new collaborative Strategic Plan to be presented to the congregation for approval. The plan focuses on three areas:

1. Enhance and Enrich Religious Exploration for our Community
2. Improve Welcoming, Advertising, & Outreach
3. Foster Connection & Involvement for Members

This is meant to be a plan to re-engage our congregation following a challenging pandemic era experience, and to be enacted while maintaining financial and program stability.

Having more in-person meetings has been very rewarding this year. We've had more people in-person for worship, committee meetings, affinity groups, potlucks, choir rehearsals, game nights, and other events, and it is great to see more faces in our community.

Our Board of Trustees and ministers had a challenge to review our financial situation and develop a plan to "live within our means" following the expiration of the "Big Gift" funding that had accompanied our last Strategic Plan. The Board reviewed our situation, had serious dialogue regarding possible staff cuts, but due to our congregation's response to our stewardship drive, including the matching fund initiative, and an additional "Big Gift," no staff reduction is suggested for next year's budget. Helping this process is the fact that in this current fiscal year, we are doing much better than budgeted.

My admiration and thanks go out to those who have served on our Board of Trustees with me this past year: Kathleen Craig, Steve Johnson, Bjorn Nilson, Susan Holland, Warren Finch, Meredith Harrill, Katie Hamilton, Mibs McCarthy, Robert Brunson, and of course our co-ministers Axel and Elaine Gehrman. We could not have achieved what we did without all of us working together. It has been my pleasure to work with such a bright, compassionate, and dedicated group.



## **Program Council Report**

Mibs McCarthy, Moderator

The UUCMP Program Council promotes effective interdependent and collaborative leadership in assuring the delivery of church programs and services, under authority of the Board of Trustees. The council consists of a representative from each committee. We meet monthly on the first Tuesday at 12:30 by Zoom. Before each meeting, committees submit written reports to the Program Council which are distributed to all committee chairs and are submitted to the board for its monthly meeting. The Program Council moderator is elected by the congregation, is a member of the church board of trustees and serves for two years with a possible second term.

In June, 2023, the Program Council approved a motion for the UUCMP Board of Trustees on Chartering a Venturing Crew: The Unitarian Universalist Church of the Monterey Peninsula (UUCMP) establishes and charters in partnership with the Boy Scouts of America (BSA) a new Venturing Crew as a part of the church's Religious Exploration program for meeting the needs, desires, and concerns of young men and women who are at least 13 years old who have completed the eighth grade or are age 14 and not yet age 21.

The Connections Fair was held on Sunday, October 1. This event was well organized and well attended. There were people signing up to be active in various ways, such as ushers, greeters, chalice circles, cleaning the outdoor benches, Friendsgiving Potluck, Music, Caring Network, Soil Mates, Buildings and Grounds, Family Ministry, Worship Associates, and the Finance Committee. There was a lot of new energy going into projects. Elaine's idea of having punches for visiting the tables and having chocolate and prizes was much appreciated.

In November and December, Program Council promoted the UU Service Committee's Guest at Your Table program. The theme was Pursuing Liberation: addressing the many issues that persons worldwide are facing due to the rise of fascism, authoritarianism, and nationalism. Individuals who donated \$150 or more had their donations matched by the UU Congregation at Shelter Rock in Manhasset, New York. Program Council supported the Strategic Planning Workshop with UUA Pacific Western Region Regional Staff person Annie Scott on Saturday, September 16. In January, we encouraged participation in small group-facilitated discussions about each of the visions and actions. The top three priorities proposed by congregants at the Strategic Planning workshop and the Strategic Planning survey were:

- 1) Religious Exploration for Children & Families (including OWL)
- 2) Welcoming/Advertising/Outreach to new people
- 3) Connection & Involvement for members.

Throughout the year we supported committee and church programs such as I-HELP, Super Flea, congregational potlucks, work parties, the service auction, pledging, and preparing budgets.

## Financial Reports

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### Treasurer's Report

Robert Brunson, Treasurer

I'll start by cutting to the all-important conclusion: The financial health of the Unitarian Universalist Church of the Monterey Peninsula (UUCMP) is very solid! We've got money in the bank and arrangements to cover our expected operating expenses and sufficient savings to provide a substantial cushion against an unforeseeable future. As I am preparing this annual report, we have just concluded our canvass for the upcoming 2024-2025 fiscal year that starts on July 1 having received commitments from the congregation to contribute more than \$475,000 to keep the church functioning for next year! **Thank you!** A bit more on this later.

To say that the COVID-19 pandemic had a profound impact on UUCMP might still be an understatement, since we saw our in-person activities and use of our church facilities drop to all but zero; our worship services, committee work, and pastoral care move almost exclusively to the virtual environment; and our common psyche suffused by a repressive fugue – and that was just its influence on our own intimate community without regard to the wider world! Despite the challenges of operating in such an environment, we at UUCMP chose to weather the pandemic storm with grace and generosity, continuing to fully compensate our paid staff and to give generously to support the ministries and fixed operational expenses of the church. As a congregation, we also opted to use a portion of our excess operating funds built up over previous years to partially fund these efforts. Lest we feel remorse about availing ourselves of some of this rainy-day money we'd built up, consider that many congregations (UU and otherwise) have had to take similar or even more austere measures, and in many instances, with far less successful results. Some could not be saved. Such unforeseen circumstances are, in fact, exactly the reason for accumulating such reserve funds in the first place! Now, we are actively engaged in establishing where we are and how best to move zealously in the directions we wish to go, leaving the troubling COVID-era shrinking in the rear-view mirror.

Discovering in the final months of the FY2022-2023 that a quirk in our accounting records had portrayed a falsely positive assessment of our asset base and grossly overstated our reserve position brought a new sense of ferment. Correcting this idiosyncrasy reduced our comfort level with the financial cushion and converted a reported \$24,406 operating *surplus* for that closing fiscal year to a rare \$52,492 operating *deficit*. To take better stock of our true financial position and to develop ways to move us back to a more secure financial footing, the Board of Trustees appointed the Financial Solutions Working Group, whose report detailed a range of specific and robust options for correcting our course, many of which have been implemented to good effect. The congregation also approved as a part of balancing the current FY2023-2024 budget the option to use up to \$132,000 in reserve funding, if needed to cover church expenses. I'm pleased to report that, through three-quarters of the fiscal year, we have not yet had to use any of that allowance – and may very well make it to the end of the year without

accessing it at all! We are even anticipating that a small operating income surplus could be available at the close of this fiscal year to bolster our excess operating reserves.

Collaborating within the church's Finance Committee, we have gained additional understanding of our financial reports and modified our chart of accounts and reporting to ensure that the financial managers, the Board of Trustees, and the congregation at large are presented with accurate and transparent statements of our operating activity and true financial condition. We have also segregated our investments accounts at Vanguard to more easily track and report investment results by fund (i.e., Operating Fund, Endowment Fund, and Phase III Building Fund). We've also been reviewing and amending the church's finance policies to remove ambiguity and more discretely provide details about the church's financial condition to ensure we're on the right track.

Looking forward to the upcoming fiscal year, the Finance Committee has proposed, and the Board of Trustees has approved and recommended for adoption by the congregation at the church's Annual Congregational Meeting on May 5, a balanced operating budget for FY 2024-2025. As noted earlier, this upcoming budget was built on the strength of a very successful "Be The Light"-themed annual canvass which saw pledge commitments jump by 10% over last year's total and included 46 pledging units that increased their pledges by 25% or more (or committed to donating at least 5% of their income) to secure almost \$50,000 in additional income through a special donor-funded pledge matching program. More good news is that we were able to avoid making any substantial cuts in our staffing commitment, including, most notably, retaining a full ministerial commitment at 1.5 full-time equivalents as the result of a restricted donation of just over \$100,000 from a donor who wishes to remain anonymous. This donation (known as "Big Gift #3") has been formally accepted by the board and is intended to supplement a portion of the funding of ministerial compensation for at least the next three years and, perhaps, even longer.

Also set for review and adoption at the annual congregational meeting in early May is a new three-year strategic plan developed with the continual engagement of much of the congregation and facilitation support from the Unitarian Universalist Association that outlines the consensus approach to addressing those priority elements identified by the stakeholders as most important to the church for the medium term. Armed with this plan, we'll have a clear, grassroots-sourced guide on where to direct our energies, our focus, and our financial resources for the church's next chapters, and lots of opportunities for all who wish to participate to choose one or more important initiatives and commit to making a difference in the future of our Unitarian Universalist Church of the Monterey Peninsula!

I'll see you in church!

## Unitarian Universalist Church of the Monterey Peninsula Budget vs Actual Income & Expense Statement March 2024

	Mar 24	Budget	\$ Over Budget	Jul '23 - Mar ...	YTD Budget	\$ Over Budget	Annual Bud...
<b>Ordinary Income/Expense</b>							
<b>Income</b>							
<b>41000 · Contribution Income</b>							
41005 · Cash Offering	1,025	450	575	6,791	3,630	3,161	4,800
41006 · Donation	2,085	800	1,285	46,357	30,500	15,857	40,000
41023 · 2022-2023 Fiscal Year Pledge	0			5,965	10,000	-4,035	10,000
41024 · 2023-2024 Fiscal Year Pledge	32,918	24,000	8,918	366,192	306,000	60,192	381,209
<b>Total 41000 · Contribution Income</b>	36,028	25,250	10,778	425,305	350,130	75,175	436,009
<b>43000 · Fundraising Income</b>							
43010 · Cultural Events Income	0	0	0	5,045	1,000	4,045	1,500
43020 · Misc. Fundraising Income	0			865	0	865	0
43030 · Annual Auction Income	0			14,320	16,000	-1,680	16,000
43040 · Super Flea Fundraising Income	0			3,873	3,300	573	3,300
43060 · Equal Exchange Income	0	150	-150	0	1,075	-1,075	1,500
43080 · Life Enrichment Activities	246	125	121	1,779	775	1,004	1,000
43095 · COVID Angels	0			8,200	0	8,200	0
43096 · OWL Program Income	0			2,767	0	2,767	0
43097 · Marathon Income	1,500			2,600	0	2,600	0
<b>Total 43000 · Fundraising Income</b>	1,746	275	1,471	39,449	22,150	17,299	23,300
<b>44000 · Endowment Disbursement</b>							
44001 · Annual Endowment Disbursement	0	0	-0	34,590	34,590	-0	34,590
<b>Total 44000 · Endowment Disbursement</b>	0	0	-0	34,590	34,590	-0	34,590
<b>46000 · Facilities Donations</b>							
46100 · Facilities Use Donations	10,500	500	10,000	52,869	32,550	20,319	34,003
<b>Total 46000 · Facilities Donations</b>	10,500	500	10,000	52,869	32,550	20,319	34,003
<b>47000 · Miscellaneous Income</b>							
47100 · Art Sales	345	0	345	345	0	345	0
<b>Total 47000 · Miscellaneous Income</b>	345	0	345	345	0	345	0
<b>48000 · Other Income &amp; Disbursements</b>							
<b>48200 · Reserve Funding Disbursements</b>							
48207 · Operating Surplus Disbursement	0	0	0	0	0	0	132,000
<b>Total 48200 · Reserve Funding Disbursements</b>	0	0	0	0	0	0	132,000
<b>48300 · Strategic Plan Support Disburse</b>							
48305 · Expanded Benefits Funding	0	0	-0	3,397	3,397	-0	3,397
48310 · Ministerial Comp Funding	0	0	-0	25,142	25,142	-0	25,142
<b>Total 48300 · Strategic Plan Support Disburse</b>	0	0	-0	28,539	28,539	-0	28,539

## Unitarian Universalist Church of the Monterey Peninsula Budget vs Actual Income & Expense Statement March 2024

	Mar 24	Budget	\$ Over Budget	Jul '23 - Mar ...	YTD Budget	\$ Over Budget	Annual Bud...
<b>Total 48000 · Other Income &amp; Disbursements</b>	0	0	-0	28,539	28,539	-0	160,539
<b>Total Income</b>	48,619	26,025	22,594	581,097	467,959	113,138	688,441
<b>Gross Profit</b>	48,619	26,025	22,594	581,097	467,959	113,138	688,441
<b>Expense</b>							
<b>50000 · Administration</b>							
50500 · Bank Service Charges	107	0	107	107	50	57	50
50510 · E-Giving Service Charges	57	80	-23	841	1,250	-409	1,490
<b>51000 · Communications</b>							
51100 · Advertising	0	116	-116	377	1,745	-1,368	2,087
51200 · Comcast Business Services	145	270	-125	1,279	2,230	-951	3,040
51300 · Phone System	86	95	-10	769	855	-86	1,140
51400 · Web Site	0	0	0	125	595	-470	595
51500 · Hearing Impaired Systems	665	908	-243	6,313	7,262	-950	9,620
<b>Total 51000 · Communications</b>	895	1,389	-494	8,863	12,687	-3,824	16,482
<b>52000 · Postage &amp; Shipping</b>							
52100 · Postage & Shipping	27	20	7	514	425	89	635
<b>Total 52000 · Postage &amp; Shipping</b>	27	20	7	514	425	89	635
<b>53000 · Office Expense</b>							
53100 · Computers	0	300	-300	0	900	-900	1,200
53200 · Software	107	89	18	1,757	1,737	20	2,194
53300 · Office Equipment Rental	221	221	0	1,990	1,989	1	2,653
53400 · Office Supplies	0	60	-60	546	540	6	720
53500 · Printing/Reproduction	107	112	-5	1,183	1,068	115	1,399
53600 · Background Checks - Not RE	0	0	0	0	1,520	-1,520	1,615
<b>Total 53000 · Office Expense</b>	435	782	-347	5,476	7,754	-2,278	9,781
<b>54000 · Property Expense</b>							
<b>54100 · Facility Services</b>							
54110 · Sexton and Cleaning Services	2,650	1,250	1,400	14,000	14,000	0	20,500
54120 · Janitorial Supplies	243	120	123	1,043	1,080	-37	1,440
<b>Total 54100 · Facility Services</b>	2,893	1,370	1,523	15,043	15,080	-37	21,940
<b>54200 · Maintenance/Repair</b>							
54201 · Interior Maintenance	651	510	141	3,309	5,890	-2,581	8,070
54202 · Exterior Maintenance	0	150	-150	0	1,350	-1,350	1,800
<b>Total 54200 · Maintenance/Repair</b>	651	660	-9	3,309	7,240	-3,931	9,870
<b>54300 · Property Systems/Taxes/Insuranc</b>							
54310 · Sound System/Video Equipment	0	0	0	158	400	-242	400
54320 · Fire Systems	614	101	513	2,977	1,305	1,672	2,341

## Unitarian Universalist Church of the Monterey Peninsula Budget vs Actual Income & Expense Statement March 2024

	Mar 24	Budget	\$ Over Budget	Jul '23 - Mar ...	YTD Budget	\$ Over Budget	Annual Bud...
54330 · Property Taxes	0	0	0	201	360	-159	360
54340 · Property/Liability Insurance	0	3,300	-3,300	27,947	29,700	-1,754	39,600
<b>Total 54300 · Property Systems/Taxes/Insuranc</b>	<b>614</b>	<b>3,401</b>	<b>-2,787</b>	<b>31,282</b>	<b>31,765</b>	<b>-483</b>	<b>42,701</b>
<b>Total 54000 · Property Expense</b>	<b>4,158</b>	<b>5,431</b>	<b>-1,273</b>	<b>49,635</b>	<b>54,085</b>	<b>-4,450</b>	<b>74,511</b>
<b>55000 · Utilities Expense</b>							
55100 · Electric Service	224	60	164	2,964	1,334	1,630	1,513
55200 · Gas Service	312	550	-238	1,196	2,285	-1,089	2,885
55300 · Waste Management Service	0	0	0	1,398	1,404	-6	1,902
55400 · Water Service	79	87	-8	710	759	-49	1,016
55450 · Well Monitoring & Repair	660	600	60	3,755	5,400	-1,646	7,475
<b>Total 55000 · Utilities Expense</b>	<b>1,275</b>	<b>1,297</b>	<b>-22</b>	<b>10,023</b>	<b>11,182</b>	<b>-1,160</b>	<b>14,791</b>
<b>57000 · Professional Services</b>							
57100 · Payroll Service Fees	196	330	-134	2,060	2,250	-190	2,910
57400 · Accounting Services	365	450	-86	4,287	4,050	237	5,400
57500 · Licenses and Permits	0	0	0	20	219	-199	1,994
<b>Total 57000 · Professional Services</b>	<b>561</b>	<b>780</b>	<b>-219</b>	<b>6,367</b>	<b>6,519</b>	<b>-152</b>	<b>10,304</b>
<b>58000 · Contingencies/Misc/Cap Reserv</b>							
58100 · Contingencies	3,200	0	3,200	16,700	0	16,700	0
58175 · Outdoor Safety Improvements	0	0	0	2,363	0	2,363	0
58200 · Miscellaneous Expenses	0			0			
<b>Total 58000 · Contingencies/Misc/Cap Reserv</b>	<b>3,200</b>	<b>0</b>	<b>3,200</b>	<b>19,063</b>	<b>0</b>	<b>19,063</b>	<b>0</b>
<b>Total 50000 · Administration</b>	<b>10,715</b>	<b>9,779</b>	<b>936</b>	<b>100,888</b>	<b>93,952</b>	<b>6,936</b>	<b>128,044</b>
<b>60000 · PROGRAMS/COMMITTEES</b>							
60100 · Communications	0	250	-250	732	3,150	-2,418	3,500
60200 · Association Support Payments							
60201 · UUA Annual Program Fund	2,393	2,393	-0	21,535	21,537	-2	28,714
<b>Total 60200 · Association Support Payments</b>	<b>2,393</b>	<b>2,393</b>	<b>-0</b>	<b>21,535</b>	<b>21,537</b>	<b>-2</b>	<b>28,714</b>
<b>60300 · Leadership Development</b>							
60301 · Board Visioning							
60302 · Strategic Long Trm Planning Ini	33	0	33	33	5,000	-4,967	5,000
<b>Total 60301 · Board Visioning</b>	<b>33</b>	<b>0</b>	<b>33</b>	<b>33</b>	<b>5,000</b>	<b>-4,967</b>	<b>5,000</b>
60320 · Leadership Training & Develop	0	42	-42	0	378	-378	2,000
<b>Total 60300 · Leadership Development</b>	<b>33</b>	<b>42</b>	<b>-9</b>	<b>33</b>	<b>5,378</b>	<b>-5,345</b>	<b>7,000</b>
<b>61000 · Lifelong Learning</b>							
61100 · Life Enrichment	0	15	-15	75	135	-60	180

## Unitarian Universalist Church of the Monterey Peninsula Budget vs Actual Income & Expense Statement March 2024

	Mar 24	Budget	\$ Over Budget	Jul '23 - Mar ...	YTD Budget	\$ Over Budget	Annual Bud...
<b>61300 · Religious Exploration</b>							
61310 · RE Supplies	91	725	-634	1,230	2,270	-1,040	4,890
61315 · RE Curricula	0	125	-125	215	375	-160	756
61320 · RE Training	0	0	0	250	1,000	-750	1,000
61340 · OWL Program Expense	104	0	104	1,142	0	1,142	0
61341 · RE Food	0	133	-133	594	1,197	-603	1,590
61351 · RE Background Screening	0	0	0	129	378	-249	441
61360 · RE Recognition/Appreciation	0	0	0	0	0	0	110
<b>Total 61300 · Religious Exploration</b>	<b>194</b>	<b>983</b>	<b>-789</b>	<b>3,560</b>	<b>5,220</b>	<b>-1,660</b>	<b>8,787</b>
<b>Total 61000 · Lifelong Learning</b>	<b>194</b>	<b>998</b>	<b>-804</b>	<b>3,635</b>	<b>5,355</b>	<b>-1,720</b>	<b>8,967</b>
<b>62000 · Congregational Life</b>							
62100 · Membership	0	33	-33	0	822	-822	1,220
62300 · Caring Network	191	50	141	243	450	-207	600
<b>62400 · Building &amp; Grounds</b>							
62410 · B&G Inside Improvements	475	500	-25	976	4,500	-3,524	6,000
62420 · B&G Outside Improvements	0	150	-150	779	1,350	-571	1,800
<b>Total 62400 · Building &amp; Grounds</b>	<b>475</b>	<b>650</b>	<b>-175</b>	<b>1,754</b>	<b>5,850</b>	<b>-4,096</b>	<b>7,800</b>
62500 · Events and Fellowship	0	260	-260	1,767	3,192	-1,425	4,157
<b>Total 62000 · Congregational Life</b>	<b>666</b>	<b>993</b>	<b>-327</b>	<b>3,765</b>	<b>10,314</b>	<b>-6,549</b>	<b>13,777</b>
<b>63000 · Social Justice</b>							
63100 · Social Justice Outreach	200	525	-325	700	2,425	-1,725	2,500
63105 · COPA Membership	0	0	0	5,000	5,000	0	5,000
<b>Total 63000 · Social Justice</b>	<b>200</b>	<b>525</b>	<b>-325</b>	<b>5,700</b>	<b>7,425</b>	<b>-1,725</b>	<b>7,500</b>
<b>64000 · Worship</b>							
<b>64100 · Music Programs</b>							
64110 · Music Equipment	0	0	0	315	750	-435	1,000
64120 · Music Supplies	660	210	450	1,707	2,870	-1,163	3,500
64130 · Musicians--Occasional	650	400	250	3,200	3,800	-600	5,000
64140 · Choir Enrichment Activities	0	0	0	0	500	-500	500
<b>Total 64100 · Music Programs</b>	<b>1,310</b>	<b>610</b>	<b>700</b>	<b>5,222</b>	<b>7,920</b>	<b>-2,698</b>	<b>10,000</b>
<b>64200 · Worship Expenses</b>							
64220 · Guest Worship Speaker Expenses	0	0	0	330	970	-640	1,455
64230 · Worship Supplies	0	12	-12	270	108	162	400
<b>Total 64200 · Worship Expenses</b>	<b>0</b>	<b>12</b>	<b>-12</b>	<b>600</b>	<b>1,078</b>	<b>-478</b>	<b>1,855</b>
<b>Total 64000 · Worship</b>	<b>1,310</b>	<b>622</b>	<b>688</b>	<b>5,822</b>	<b>8,998</b>	<b>-3,176</b>	<b>11,855</b>
<b>65000 · Stewardship &amp; Fundraising Exp</b>							
65100 · Stewardship Expenses	163	50	113	163	2,950	-2,787	3,100

## Unitarian Universalist Church of the Monterey Peninsula Budget vs Actual Income & Expense Statement March 2024

	Mar 24	Budget	\$ Over Budget	Jul '23 - Mar ...	YTD Budget	\$ Over Budget	Annual Bud...
65300 · Cultural Events Expense	623	0	623	3,623	600	3,023	900
65400 · Annual Auction Expenses	0	0	0	0	55	-55	440
65500 · Super Flea Expenses	0	0	0	0	300	-300	300
65600 · Equal Exchange Expenses	0	150	-150	0	1,350	-1,350	1,800
65700 · Endowment Expenses	0	100	-100	0	900	-900	1,200
<b>Total 65000 · Stewardship &amp; Fundraising Exp</b>	<b>786</b>	<b>300</b>	<b>486</b>	<b>3,786</b>	<b>6,155</b>	<b>-2,369</b>	<b>7,740</b>
<b>Total 60000 · PROGRAMS/COMMITTEES</b>	<b>5,582</b>	<b>6,123</b>	<b>-541</b>	<b>45,008</b>	<b>68,312</b>	<b>-23,304</b>	<b>89,053</b>
<b>70000 · Employee Expenses</b>							
71000 · Staff Benefits							
71600 · Workers Compensation Insurance	82	139	-57	898	869	29	1,147
<b>Total 71000 · Staff Benefits</b>	<b>82</b>	<b>139</b>	<b>-57</b>	<b>898</b>	<b>869</b>	<b>29</b>	<b>1,147</b>
<b>72000 · Payroll</b>							
72100 · Minister Pay & Benefits							
72101 · Minister Housing Allowance	7,296	7,296	-0	48,452	48,640	-188	63,230
72103 · Minister Salary	13,406	13,227	179	89,039	88,180	859	114,638
72104 · Minister Professional Expenses	0	0	0	10,153	17,787	-7,634	17,787
72106 · Minister Benefits							
72107 · Minister Retirement Contrib	2,052	2,052	0	13,648	13,680	-32	17,787
72108 · Minister Medical Insurance	3,023	3,013	10	28,655	27,993	662	38,186
72109 · In-Lieu of FICA 7.65% Base Cap	1,570	1,570	0	10,427	10,469	-42	13,607
72111 · Minister Dental Insurance	87	87	-0	858	860	-2	1,152
72113 · Minister Life Insurance	38	38	0	548	545	3	748
72114 · Minister LTD Insurance	-47	131	-178	134	1,326	-1,192	1,780
<b>Total 72106 · Minister Benefits</b>	<b>6,723</b>	<b>6,891</b>	<b>-168</b>	<b>54,270</b>	<b>54,873</b>	<b>-603</b>	<b>73,260</b>
<b>Total 72100 · Minister Pay &amp; Benefits</b>	<b>27,424</b>	<b>27,414</b>	<b>10</b>	<b>201,913</b>	<b>209,480</b>	<b>-7,567</b>	<b>268,915</b>
<b>72200 · RE Employees</b>							
72210 · RE Director	2,931	2,931	-0	19,652	19,540	112	25,400
72211 · DRE Retirement Contrib	0	293	-293	371	1,951	-1,580	2,540
72216 · DRE Medical Insurance	0	339	-339	1,462	6,508	-5,047	9,190
72213 · DRE Life Insurance	0	18	-18	36	162	-126	214
72214 · DRE LTD Insurance	0	28	-28	55	252	-197	330
72215 · DRE Professional Expenses	0	0	0	125	2,540	-2,415	2,540
72217 · DRE Dental Insurance	0	10	-10	37	209	-172	288
72220 · RE Team Member	602	1,606	-1,004	3,681	10,709	-7,028	13,923
<b>Total 72200 · RE Employees</b>	<b>3,533</b>	<b>5,225</b>	<b>-1,692</b>	<b>25,418</b>	<b>41,871</b>	<b>-16,453</b>	<b>54,425</b>
<b>72300 · Music Employees</b>							
72310 · Music Director	3,374	3,374	-0	22,406	22,491	-85	29,240
72311 · Music Director Retirement Contr	337	337	0	1,228	562	666	1,237
72313 · Music Director Life & ADD Insur	0	20	-20	0	180	-180	244
72314 · Music Director LTD Insurance	0	33	-33	0	297	-297	390



## Unitarian Universalist Church of the Monterey Peninsula Budget vs Actual Income & Expense Statement March 2024

	Mar 24	Budget	\$ Over Budget	Jul '23 - Mar ...	YTD Budget	\$ Over Budget	Annual Bud...
72315 · Music Director Professional Exp	0	0	0	0	2,924	-2,924	2,924
72320 · Staff Accompanist	2,017	2,017	0	13,397	13,449	-52	17,483
<b>Total 72300 · Music Employees</b>	<b>5,729</b>	<b>5,781</b>	<b>-52</b>	<b>37,032</b>	<b>39,903</b>	<b>-2,871</b>	<b>51,518</b>
<b>72400 · Administrative Employees</b>							
72410 · Administrator	3,599	3,190	409	23,775	21,262	2,513	27,643
72411 · Administrator Retirement Contri	324	319	5	2,341	2,129	212	2,764
72415 · Admin Professional Exp	0	0	0	0	450	-450	450
72420 · Office Assistant	2,588	2,677	-89	17,786	17,849	-63	23,202
72421 · Office Asst Life & ADD Ins	0	16	-16	0	144	-144	193
72422 · Office Asst LTD Insurance	0	25	-25	0	225	-225	302
72423 · Off Asst Retirement Contributio	259	268	-9	1,779	1,782	-3	2,320
72430 · Set Up Assistance	100	100	0	900	900	0	1,200
72431 · Videography Team	3,510	2,925	585	23,044	19,500	3,544	25,350
<b>Total 72400 · Administrative Employees</b>	<b>10,379</b>	<b>9,520</b>	<b>859</b>	<b>69,625</b>	<b>64,241</b>	<b>5,384</b>	<b>83,424</b>
<b>Total 72000 · Payroll</b>	<b>47,065</b>	<b>47,940</b>	<b>-875</b>	<b>333,989</b>	<b>355,495</b>	<b>-21,506</b>	<b>458,282</b>
<b>73000 · Payroll Taxes</b>	<b>1,432</b>	<b>1,246</b>	<b>186</b>	<b>9,535</b>	<b>9,243</b>	<b>292</b>	<b>11,915</b>
<b>Total 70000 · Employee Expenses</b>	<b>48,579</b>	<b>49,325</b>	<b>-746</b>	<b>344,422</b>	<b>365,607</b>	<b>-21,185</b>	<b>471,344</b>
<b>Total Expense</b>	<b>64,877</b>	<b>65,227</b>	<b>-350</b>	<b>490,318</b>	<b>527,871</b>	<b>-37,553</b>	<b>688,441</b>
<b>Net Ordinary Income</b>	<b>-16,258</b>	<b>-39,202</b>	<b>22,944</b>	<b>90,780</b>	<b>-59,912</b>	<b>150,691</b>	<b>0</b>
<b>Other Income/Expense</b>							
<b>Other Income</b>							
41540 · Other Income Unbudgeted	0			62			
<b>Total Other Income</b>	<b>0</b>			<b>62</b>			
<b>Other Expense</b>							
50551 · Suspense	-1,332			-1,173			
<b>Total Other Expense</b>	<b>-1,332</b>			<b>-1,173</b>			
<b>Net Other Income</b>	<b>1,332</b>			<b>1,236</b>			
<b>Net Income</b>	<b>-14,927</b>	<b>-39,202</b>	<b>24,275</b>	<b>92,015</b>	<b>-59,912</b>	<b>151,927</b>	<b>0</b>

**Unitarian Universalist Church of the Monterey Peninsula**  
**^Balance Sheet by Class**  
**As of March 31, 2024**

	Endowment Fund	Phase III	Operating Fund (General Fund)	Total General Fund	TOTAL
<b>ASSETS</b>					
<b>Current Assets</b>					
<b>Checking/Savings</b>					
12305 · Checking RB 8780	0	0	36,493	36,493	36,493
12405 · Savings RB 5590	0	0	10,001	10,001	10,001
12100 · Petty Cash	0	0	300	300	300
12101 · RE Petty Cash	0	0	301	301	301
<b>Total Checking/Savings</b>	<b>0</b>	<b>0</b>	<b>47,095</b>	<b>47,095</b>	<b>47,095</b>
<b>Other Current Assets</b>					
16112 · Vanguard MF VWIAX 42549416	0	0	163,378	163,378	163,378
16200 · Vanguard Settlement MM 42549416	0	0	175,683	175,683	175,683
16451 · Vanguard EF ETFs 78606562	795,278	0	0	0	795,278
16452 · Vanguard Phase III CF 23590753	0	475,302	0	0	475,302
<b>Total Other Current Assets</b>	<b>795,278</b>	<b>475,302</b>	<b>339,061</b>	<b>339,061</b>	<b>1,609,641</b>
<b>Total Current Assets</b>	<b>795,278</b>	<b>475,302</b>	<b>386,156</b>	<b>386,156</b>	<b>1,656,736</b>
<b>TOTAL ASSETS</b>	<b>795,278</b>	<b>475,302</b>	<b>386,156</b>	<b>386,156</b>	<b>1,656,736</b>
<b>LIABILITIES &amp; EQUITY</b>					
<b>Liabilities</b>					
<b>Current Liabilities</b>					
<b>Credit Cards</b>					
20060 · VISA Biz Card UUCMP #2579	0	0	92	92	92
<b>Total Credit Cards</b>	<b>0</b>	<b>0</b>	<b>92</b>	<b>92</b>	<b>92</b>
<b>Other Current Liabilities</b>					
21101 · Future FY Pledge Payments	0	0	46,537	46,537	46,537
21102 · Future FY Match Payments	0	0	37,938	37,938	37,938
<b>Total Other Current Liabilities</b>	<b>0</b>	<b>0</b>	<b>84,474</b>	<b>84,474</b>	<b>84,474</b>
<b>Total Current Liabilities</b>	<b>0</b>	<b>0</b>	<b>84,566</b>	<b>84,566</b>	<b>84,566</b>
<b>Total Liabilities</b>	<b>0</b>	<b>0</b>	<b>84,566</b>	<b>84,566</b>	<b>84,566</b>
<b>Equity</b>					
<b>21160 · Unrestricted Funds</b>					
21170 · Church Admin Working Capital	0	0	2,437	2,437	2,437
<b>Total 21160 · Unrestricted Funds</b>	<b>0</b>	<b>0</b>	<b>2,437</b>	<b>2,437</b>	<b>2,437</b>
<b>21150 · Temporarily Restricted Funds</b>					
21100 · Minister's Discretion--Rstd	0	0	13,131	13,131	13,131
21600 · Program Funds--Rstd					

**Unitarian Universalist Church of the Monterey Peninsula**  
**^Balance Sheet by Class**  
**As of March 31, 2024**

	Endowment Fund	Phase III	Operating Fund (General Fund)	Total General Fund	TOTAL
21625 · KAZU Underwriting - Rstd	0	0	308	308	308
21630 · Shared Plate--Restricted	0	0	4,072	4,072	4,072
21635 · I-HELP Support Fund-Rstrd	0	0	911	911	911
31010 · Intern Board Reserve	0	0	8,000	8,000	8,000
<b>Total 21600 · Program Funds--Rstd</b>	<b>0</b>	<b>0</b>	<b>13,290</b>	<b>13,290</b>	<b>13,290</b>
<b>Total 21150 · Temporarily Restricted Funds</b>	<b>0</b>	<b>0</b>	<b>26,421</b>	<b>26,421</b>	<b>26,421</b>
<b>21400 · Endowment Fund--Rstd</b>					
21410 · Memorial Funds	229,916	0	0	0	229,916
21416 · Endowment Donations	409,088	0	0	0	409,088
16411 · Endmt MF Unrealized gain/loss	156,274	0	0	0	156,274
<b>Total 21400 · Endowment Fund--Rstd</b>	<b>795,278</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>795,278</b>
<b>21660 · Youth &amp; Family Funds--Rstd</b>					
21669 · Campout Funds--Rstd	0	0	226	226	226
<b>Total 21660 · Youth &amp; Family Funds--Rstd</b>	<b>0</b>	<b>0</b>	<b>226</b>	<b>226</b>	<b>226</b>
<b>21715 · Phase III Building Fund</b>					
21718 · Ph III Bldg Invstmt Unrlzd G/L	0	-2,817	0	0	-2,817
21716 · Ph III Bldg Fund Donations	0	478,119	0	0	478,119
<b>Total 21715 · Phase III Building Fund</b>	<b>0</b>	<b>475,302</b>	<b>0</b>	<b>0</b>	<b>475,302</b>
<b>21751 · Board Restricted Funds</b>					
16413 · Vanguard Mutual Fund Gains/Loss	0	0	-8,413	-8,413	-8,413
<b>Total 21751 · Board Restricted Funds</b>	<b>0</b>	<b>0</b>	<b>-8,413</b>	<b>-8,413</b>	<b>-8,413</b>
<b>32100 · Contingency Reserve</b>					
16412 · Vanguard Dividend Brokerage	0	0	6,426	6,426	6,426
32110 · 3-Month Reserve	0	0	172,110	172,110	172,110
32120 · Excess Operating Reserves	0	0	10,368	10,368	10,368
<b>Total 32100 · Contingency Reserve</b>	<b>0</b>	<b>0</b>	<b>188,904</b>	<b>188,904</b>	<b>188,904</b>
<b>Net Income</b>	<b>0</b>	<b>0</b>	<b>92,015</b>	<b>92,015</b>	<b>92,015</b>
<b>Total Equity</b>	<b>795,278</b>	<b>475,302</b>	<b>301,589</b>	<b>301,589</b>	<b>1,572,170</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>795,278</b>	<b>475,302</b>	<b>386,156</b>	<b>386,156</b>	<b>1,656,736</b>

## Committee Reports

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### Art Committee

Karen Hunting

The purpose of having art on the Welcome Hall walls is to provide a visually pleasing backdrop to the events held there, to provide income from the sales of the artists' work and to widen the community interest and knowledge of the church through the artists' promotions and receptions.

Valued committee members who have helped hang the shows and assist at receptions include JT Mason, Lauren Keenan, Gail Skidmore, Skip Kadish, An McDowell, Mary Kay Hamilton, Suzanne Schmidt, Lee Hulquist and Bruce Hamilton.

Letters to artists, legal forms and instructions for prepping, hanging and promoting shows were created. An Art Committee reference binder containing documents, instructions, history and signed forms for each artist was created to guide future art committee chairs and members.

During the past two years, twelve different artists, have shown their art for a period of one to two months each. Many of them have donated 20% of their sales to the church. The opportunity to give tours and talk about the church's principles and goals has increased awareness of Unitarian Universalism and particularly in UUCMP.

The future of the art committee and having art and/or photography in the Welcome Hall remains unknown.

As of May 31, 2024, there are not any future shows scheduled as I am stepping down and a new curator or alternate program has not been identified.

### Buildings and Grounds Committee

Lauren Keenan

The past year has seen numerous calls for repairing appliances in the kitchen, the fire suppression pump, and more, all of which were facilitated by our retiring administrator, Ray Krise. Thank you, Ray!

A coordinated effort has been made to improve the signage in the kitchen so that all users are aware of 'best practices' when using the appliances, and food waste and/or storage. The cabinets are more even labeled so users know where to find/return items, and there has been extensive winnowing out of duplicate utensils/unused/broken items, resulting in a much friendlier kitchen experience for all.

Our Welcome Hall closet has been tidied up and cleared of unused items, so it is much easier to find table clothes, cushions and other items stored there.

There have been several very successful work parties this past year. In the fall, drought tolerant plants were put in around the entrances to the church. With our plentiful winter rains, they are healthy and enhance our other outdoor improvements. This spring two more work parties were held that saw the Welcome Hall walls touched up with fresh paint, carpets cleaned, the roof cleared of pine needles and the gutters cleaned, many weeds pulled, genista extracted, more drought tolerant plants put in, the defunct composter moved out of sight, pruning around signage so that they are more visible, and much more. Another work party is being planned for May, when we hope to finally concentrate our efforts on brightening our big wooden sign at the entrance to the church, among other things.

All of the light fixtures in the sanctuary have been updated with new LED bulbs. The glass globes were all washed as well. The result is that the sanctuary is brighter, with a warm tone.

The church windows and skylights will be washed in April. The carpet was cleaned in February.

The success of all of the improvements made, both inside and outside, are the result of so many UUCMP congregants devoting their time, talent, and energy for the betterment of our beloved space. Thank you all!

### **Caring Network**

Carol Collin

The mission of the Caring Network Steering Committee is to care for members and friends of the church in times of crisis and to acknowledge celebrations or sorrows. We enlist the aid of others in the congregation to offer a caring presence, an immediate response, a friendly hand, personal contact, emotional support, and guidance to other sources of support when needed.

The Caring Network follows the Vision statement, "We are a sanctuary of love: providing emotional, spiritual, and intellectual support; offering comfort and challenge that emboldens us to continue our work in the world."

Current members of the Caring Network Steering Committee include Carol Collin, Mibs McCarthy and Rev. Axel Gehrman.

During the year we have tried to keep up communication with and among congregants. We have:

- Sent cards to a number of different people, some of them more than once. We sent get-well cards, sympathy cards, congratulatory cards for a variety of reasons, birthday cards for those 80 and older, and birthday cards for children and youth 18 and younger.
- Organized calls and visits to congregants who were housebound, in the hospital, or in nursing homes.

- Organized rides for congregants to various medical appointments; during the year different congregants provided transportation, meals, companionship, and other assistance to those in need.
- Communicated congregational joys and concerns by submitting items to be shared in the Joys and Sorrows portion of Sunday services, strengthening UUCMP's community spirit.

Anyone is welcome to help out with visits, food, transportation, and any other activities. We are working together to increase the sense of loving community in our church and in our world. The Caring Network wishes to give many thanks to all those who helped out during the last year. If you wish to be of assistance providing rides, meals, calls, or other services, please contact the Caring Network at [caringnetwork@uucmp.org](mailto:caringnetwork@uucmp.org)

### **Chalice Circles/Covenant Groups**

Rev. Axel Gehrmann

We currently have five active Chalice Circles/ Covenant Groups devoted to small group ministry. The leaders and facilitators of these groups included: Kathleen Craig, Carol Greenstreet, Peggy Hansen, Rose and Mike Lovell, Sharon Miller, Kat Morgan and Kerry Sissem.

The groups provide opportunities for members and friends of the church to develop deeper connections and wider service within our community. Meetings usual focus on a particular issue or our monthly worship theme as their point of departure or use changing topics for discussion. Groups consist of 4-12 people who meet once or twice a month for about two hours to explore meaningful topics together. A typical meeting begins with opening words and a check-in, followed by sharing and discussion. The meeting concludes with a check-out and closing words. The leaders/ facilitators of the groups met with Rev. Axel every month or two for support, coordination, resources, training, and identifying potential new leaders and launching new groups.

### **Committee on Ministry**

Carl Christensen

Members: Mary Kay Hamilton, Peggy Hansen, Kent Weinstein, Carl Christensen

The Committee on Ministry (CoM) works to strengthen the quality of ministry in the congregation and serves as an additional communication channel between the ministers and the congregation.

The Committee continues to meet bi-monthly with the Ministers.

- Meeting topics and tasks have included:
  - Facilitating communication between the congregation and staff.
  - Evaluating the ministry of the church during the pandemic and after.

## **Communication Committee**

Rev. Elaine Gehrmann

The Communications efforts at UUCMP have continued to benefit greatly from the contributions of Wanda Sue Parrott, and Sharyn Routh. Wanda does an amazing job with creatively publicizing UUCMP services on Nextdoor and Facebook week after week. Sharyn has created a number of eye-catching flyers and had many creative ideas about outreach and events to publicize, including ordering new logo imprinted tablecloths for tabling at community events. Be Astengo suggested that we do more with short videos, and with the social media skills of our Office Assistant Karina Briseno, we have posted short sermon clips every week, and continued our FB, Twitter and Instagram presences with regular postings and occasional boosted posts (ads). Karina also does a great job keeping the website up to date, and incorporating changes suggested by members. We continue to conduct periodic KAZU underwriting campaigns, and have advertised in the MCWeekly student issue and holiday issue. With the new Strategic Plan we hope to increase our outreach communications in the coming year. Communications Committee consulting members include Bruce Hamilton, Be Astengo, Fred Hamilton and Celia Barberena.

## **Endowment Committee**

Steve Johnson, Gregg McKee

The Endowment Fund for UUCMP is invested in socially-responsible mutual funds in a dedicated account at Vanguard Investments. Donations to the UUCMP Endowment are initially deposited in the church's checking account, before being transferred to Vanguard. The Vanguard account consists of a mix of exchange-traded stock and bond funds, all focused on "ESG" (Environmental, Social and Governance-aware) investments. Investment objectives seek a consistent return with moderate risk.

During late summer and early autumn 2023, UUCMP's Endowment investment funds were transferred from the Unitarian Universalist Common Endowment Fund (UUCEF) to Vanguard. This step was taken to improve financial returns on UUCMP's Endowment, and to avoid potential diversion of UUCMP funds from the UUCEF investment pool to charitable causes, per direction by a vote of Unitarian Universalist Association (UUA) member congregations. (Such diversion was proposed during the 2023 UUA General Assembly, but was voted down.)

Once each fiscal year (July to June), with approval from the UUCMP Board of Trustees and as specified in the church Bylaws, Section 13.06, up to 5% of the three-year average balance may be withdrawn from UUCMP's mutual fund account. The Board specifies to what purposes that withdrawal will be applied to benefit the church and our programs. The amount of disbursement is calculated in April each year, for inclusion in the proposed Operating Budget that is subsequently approved by the Board and then the congregation. Transfer from Vanguard to the church checking account is managed by the UUCMP Treasurer during early July, at the beginning of the fiscal year. UUCMP withdrew a

disbursement of \$34,590 for fiscal year 2023-2024, which was applied to the church's Operating Fund, and is budgeting a disbursement of \$37,125.98 for fiscal year 2024-2025.

Between April 1, 2023, and March 31, 2024, UUCMP's account balance at UUCEF and subsequently at Vanguard increased from \$712,664.28 to \$795,278.20. \$600.00 of that increase is attributable to donations to the Endowment during the year; the rest is due to interest, dividends and both realized and unrealized capital gains (i.e., changes in market value, whether realized on sale of fund shares, or unrealized for retained shares). The July 2023 disbursement of \$34,590 had also been removed from the Endowment balance prior to March 31, 2024. Using these figures, the approximate rate of return on invested Endowment funds during this period was 16.4%.

### **Family Ministry Committee**

Corey Brunson

The Family Ministry Committee (FMC) strives to meet the needs of our children, teens, and emerging adults by advocating and planning for the full inclusion of families within the life of the congregation, working closely with the Director of Religious Exploration (DRE). The individuals who serve on the FMC tend to be the go-to people when the DRE needs another adult in a classroom, entertainment for the children during a church special event, or the cleaning out of long-forgotten storage closets. UUCMP has some very generous people on the FMC who give of their time and talent week after week. Our current members are Warren Finch, Shannon Morrison, Rebecca Irwin, and Patty Pai. I became the chair of the committee last year when our long-time leader, Warren Finch, joined the board of trustees.

The FMC has been fortunate this year to work closely with Sharyn Routh as our DRE. Sharyn is organized, enthusiastic, creative, and (this is important to me!) patient with her volunteers. She is on top of things and, thus, makes the work of the FMC easier.

Even so, this past year has been challenging. Before the COVID shutdown, we had four classes of children and youth on a typical Sunday with average attendance nearing 20 kids. Today, we have a single class with only a handful of children. (See Sharyn's DRE report on page X for a detailed explanation.) As UUs, we have so much to offer families, but we have not been particularly successful in attracting them after the pandemic shutdown.

The strategic plan currently being considered places an emphasis on RE programs and calls on us to grow the program and better integrate children and youth into the life of the congregation. Those of us who have been in the RE trenches for a while fully support these goals. You'll be hearing more from us in the weeks and months ahead as we seek to bring more of the congregation into the RE fold as teachers, singers of songs, readers of books, builders of block towers, and creators of adventures.

It is said that, in UU churches, the congregation is the curriculum. The most important thing our children and youth learn on Sundays is that they are valued and loved. You are invited to help us in this important work.



## Finance Committee

Ted Raabe

**Purpose:** The Finance Committee is a standing committee of the Church and reports directly to the Board of Trustees. The Finance Committee coordinates with and advises the Board of Trustees, the Ministers, and the Church Treasurer on financial policies and matters related to administrative management, budgeting, and contracts. The Finance Committee reviews policies to ensure the security and accountability of the church's finances as well as proposes to the Board and the Congregation the annual operating budget and then oversees its execution.

The purpose of UUCMP's Finance Committee is multifaceted, but primarily it revolves around ensuring the financial health and integrity of the Church. Here are some key purposes:

- **Financial Oversight:** The committee is responsible for overseeing the financial operations of the church, including budgeting, accounting, and financial reporting.
- **Budgeting and Planning:** They develop and oversee the church's budget, ensuring that financial resources are allocated appropriately to support the mission and activities of the church.
- **Financial Stewardship:** They promote responsible stewardship of the church's financial resources among church members, encouraging giving and ensuring that funds are used effectively and ethically.
- **Risk Management:** They identify and assess financial risks facing the church and develop strategies to mitigate these risks, ensuring the long-term financial stability of the church.
- **Compliance:** They ensure that the church complies with relevant financial regulations and reporting requirements, including tax laws and accounting standards.
- **Transparency and Accountability:** They provide transparency to the congregation regarding the church's financial status and decisions, fostering trust and accountability within the church community.
- **Financial Planning and Strategy:** They participate in long-term financial planning and strategy development to support the growth and sustainability of the church's mission and ministries.
- Overall, the finance committee plays a crucial role in managing the financial affairs of the church in a responsible, transparent, and accountable manner, ultimately supporting the church in fulfilling its mission and serving its community.

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**Meetings:** Meetings are conducted monthly, usually on the second Wednesday of the week. This is a hybrid meeting for the time being, being held at the Church in the conference room, and on Zoom. Also, at other times as needed; meetings are listed in the church calendar. ***Visitors are always welcome!***

## Finance Committee Members:

Ted Raabe, Chair  
Robert Brunson, Treasurer of UUCMP  
Steven Johnson  
Jaya Bajpai  
Celia Barberena  
Peter Woodruff  
*Ministerial Liaison: Rev. Axel Gehrmann*

This committee is overseeing the execution of the \$688,441 operating budget for the current 2023-2024 fiscal year, July 1, 2023 through June 30, 2024. We are also in the process of preparing the next fiscal year budget of July 1, 2024 to June 30, 2025 which will be presented to the congregation at the Church's Annual Meeting on May 5, 2024.

## Opportunities and Challenges

- **Budgeting Process:** As a part of the budget development process, the Finance Committee requests details about committee plans and anticipated timing of expenditures to enable better cash planning by the church. In addition, we track separately the gross income and associated expenses for the church's various fundraising activities.
- **Financial Education:** The Finance Committee conducts with the Program Council and committee leaders periodic reviews of the Church's monthly financial reports to enhance tracking of income, expenses, and fundraising results.
- **Finance Policies:** The Finance Committee completes the weekly bank deposit preparation and reviews the Church's finance-related policies and proposes action on recommended updates.
- **Finance Committee Membership:** We are always eager to add to the size and diversity of our committee and would welcome your active participation! ***No fancy credentials or even special financial expertise necessary!***

## Intern Committee

Carol Galginaitis

Members: Carol Galginaitis (Chair), Laurie Bulgier, Lauren Keenan, JT Mason

UUCMP did not have an intern working with our congregation for the 2023-2024 church year because our insurance policy specifically prohibited anyone from living on church property.

In previous years, we had offered the downstairs apartment to incoming interns so that they could afford to move to this expensive area. Because of this new restriction, we decided to forego looking for an intern for the 2023-2024 year. The church will continue to evaluate its ability to hire an intern over time, but there are no immediate plans to look for an intern for the 2024-2025 church year.

## **Membership Committee**

Maren Martin

**Members:** Rose Lovell (Chair), Maren Marten, Carol Collin, Barbara Woodruff, Connie Nadler, Doris Beckman, Martin Skerritt, Axel Gehrman, active participant and creative consultant Corey Brunson.

**Purpose:** The Membership Committee works to serve the needs of UUCMP members, friends and visitors by offering activities for connecting and creating a welcoming environment.

The actions of the Membership Committee over the past 12 months included:

- All visitors who completed a visitor card received a welcome call by a member of the Membership Committee
- A Sip n' Social gathering was held in July at the Lovell's and included new members, visitors and the Membership committee - 24 attendees
- Talents, Experience and Interest Surveys were put online by Axel and we contacted each person who filled one out and informed them how they can connect
- Membership sponsored "Bring a Friend Sunday" in October
- Participated in the Connections Fair in October with a table and information
- A New Member and Visitor orientation held October 29, 2023 had 24 attendees
- We sponsored the Friendsgiving Potluck for Thanksgiving with 52 in attendance and it was really well received
- We organized a "Fun and Fellowship" Potluck with Salads and Desserts along with 3 breakouts in January: Chalice Circle, games, and crafts with 45 attendees
- New Member and Visitor orientation in April 2024
- New Member Ceremony in May 2024
- Managed Ushers and Greeters for every service
- Continue to seek ways and institute changes in order to make our congregation even more warmly welcoming to visitors

21 new members joined UUCMP as of April, 2024 - there may be more!

## **Music Committee**

Carol Collin

The charge to the Music Committee is to work in close coordination with the music staff to deepen the spiritual experience of the congregation through a wide variety of music of the highest quality.

Music Committee members include Jorge Torrez, Carol Collin (chair), Be Astengo, Christi Brekke, Barbara Bullock-Wilson, Deb Miller, Lynda Sayre, Bud Smith, and Kent Weinstein. In addition to assisting the Music Director this past year, the Music Committee presented a Karaoke Concert on February 17 with professional Karaoke jockey Dana Morrigan.

The purpose of UUCMP concerts is two-fold: to share music and to build community for both congregants and guests. Every concert is an opportunity not only to offer uplifting musical experiences for everyone, but also to help guests become better acquainted with UUCMP, its values, principles, and activities.

The usual agreement with the performers has been to divide the money from the ticket sales evenly between UUCMP and the performers, though we pay a base amount for a karaoke concert. More concerts are planned for the coming year.

We support the music director and accompanist in the work they are doing, including preparing for two Music Sunday services per year.

## **Nominating/Leadership Committees**

Mibs McCarthy

The Nominating Committee consists of Carol Greenstreet, Kent Weinstein, and Mibs McCarthy. Mibs has reached the end of her term and Mike Lovell will be joining the committee in her place. The Leadership Committee has not been active this past year. We hope to build a committee and be active starting in July.

## **Pastoral Associates Team**

Rev. Axel Gehrmann

Members of our Pastoral Associates Team included: Rev. Dennis Hamilton, Peggy Hansen, Meredith Harrill, JT Mason, Sharon Sadler, Kerry Sissem, Darold Skerritt, and Rev. Axel.

Our Pastoral Associates serve the congregation by offering caring and spiritual support to members and friends of the church in times of need. This includes members who cannot attend church for some reason, and those who are ill or grieving or facing other difficulties in their lives. Pastoral Care is offered through personal visits and, as appropriate, by telephone and written contact, including email. These conversations are held in confidentiality and are not shared outside the Pastoral Care Team. The entire team meets monthly with Rev. Axel to share information and resources and to support one another in their work.

## **Service Auction Committee**

Lauren Keenan, Steve Johnson

The 2023 Service Auction, with the theme “Under the Sea,” was conducted from Saturday, October 28 through Sunday evening, November 5, 2023 (the Silent Auction portion, with a Live Auction for special donations on Saturday evening, November 4. Planning began in early September. Committee members were Lauren Keenan, Carol Collin, Fred Hamilton, Steve Johnson, Karen Judkins and Rev. Elaine Gehrmann. Karen Araujo, Be Astengo and Helen Shamble served as the emcee/auctioneer team for the Live Auction evening.

55 winning bidders enjoyed the food, good, services and experiences offered by 48 donors. Total auction income was \$14,270.50 (\$936 of which came as supplemental donations), against expenses totaling \$689.28, netting \$13,581.22 for the church. For comparison, here is the net income from prior UUCMP Service Auctions: 2018 - \$13,687; 2019 - \$15,542; 2020 – no auction; 2021 - \$16,720; 2022 - \$11,286.

After successfully managed auctions in April 2021 and October 2022, we once again used the Auctria on-line auction service to register and display catalog items, receive bids, and communicate with donors and bidders. Paper auction catalogs were printed and made available to UUCMP members and friends who preferred that format. The Live Auction was broadcast over Zoom, allowing both remote participants and in-person attendees in the church sanctuary to bid during the event. Pre-recorded Talent Show segments were interspersed in the Live Auction proceedings.

The Committee would like to thank our generous donors, bidders, and Talent Show participants. This event is a major fundraiser for the church, made possible only by your enthusiastic participation.

## Social Justice Committee

Lee Hulquist

The Social Justice Committee meets on the first Sunday of the month, at 12:00 p.m., after church services, in the church sanctuary.

The committee is open to all members and friends of UUCMP.

In harmony with the UU 7<sup>th</sup> and 8<sup>th</sup> Principles, we do outreach at social justice events, parades and films, and educate others about issues and opportunities for action. We coordinate and cooperate with major programs fighting against war, poverty, racism, homophobia, poverty and more. This year our team focused on: Whites For Racial Equity / reparations, and ongoing support of the Ohlone, Costanoan, and Esselen Nations.

### Committee activities and sub-committees include:

#### 1. Shared Offering

- In the fall, church members and friends may nominate a nonprofit organization to be selected as one of 12 recipients of the Shared Offering program. A vote decides which organizations are selected at the next Social Justice Committee meeting.
  - 2024 Shared Offering Recipients 2024:
    - January      Blind and Visually Impaired Center
    - February     The Village Project
    - March        Caste Action Alliance Scholarship Fund
    - April         Rancho Cielo
    - May          Ohana
    - June         Transformative Justice Center
    - July         Habitat Stewardship Project, Monterey Bay
    - August       I-HELP for Men
    - September   Regeneración – Pajaro Valley Climate Action
    - October      Housing Resource Center
    - November   Breakthrough for Men
    - December   Malala Fund

#### 2. I-HELP

- UUCMP continues to host the men and women in the Interfaith Homeless Emergency Lodging Program, known as I-HELP, each month. Dedicated members and friends organize the meals and encourage new volunteers to assist with the food and join the program participants for the meals.
- 3. **Environmental Justice Committee** – meets on the 2<sup>nd</sup> Sunday, 12:00 p.m., in the church sanctuary. Please see the following report from the Environmental Justice Group, May 2023 - April 2024

## Environmental Justice

We provide monthly environmental justice articles for the UUCMP newsletter and a vegetarian recipe each month to encourage people to eat less meat, and we recycle batteries for church members.

Nan Foster presented a program on Al Gore's Climate Project, Saturday, September 23, 2 - 4 p.m. There was enthusiastic attendance by church and community members.

We watched a recording from the coordinators of the UU Green Sanctuary 2030 Program about the way the Ann Arbor, Michigan UU church is engaged in climate change. We began a study of the UUA Green Sanctuary 2030 program and discussed how we might engage in this process at our church.

We began taking action together with the Climate Action Now smartphone app. With this app, an individual can take 5 meaningful actions in five minutes.

Rev. Elaine and Suzy Worcester led a discussion of the book, *The Future We Choose: The Stubborn Optimist's Guide to the Climate Crisis* by Christiana Figueres and Tom Rivett-Carnac.

For the month of April, we have a table each Sunday after church in the Welcome Hall with information about signing up for the Central Coast Community Energy Prime program with PG&E where each home can receive 100% of its electricity from renewable sources, how to use the Climate Action Now app, and the UUCMP EcoChallenge Team. The goal of the EcoChallenge is to join with fellow UUCMP members to learn about and try climate solutions for a month, and possibly develop new sustainable behaviors.

### **4. Peace Coalition for Monterey County**

UUCMP is a member of the Peace Coalition. We are seeking volunteers to attend the meetings and report back. Peace Coalition meetings are every other month on the 3<sup>rd</sup> Sunday, 2:00 to 3:30.

### **5. Reverend Elaine Gehrmann created the Social Justice Library in the church foyer. Social justice topics and banned books are available to borrow.**

### **6. Social Justice Opportunities are offered in the weekly newsletter.**

### **7. COPA – Please see the following report from COPA Liaisons.**

## **Communities Organized for Relational Power in Action (COPA)**

Karen Judkins and Laura Nagel

**On 20 May 2023 COPA celebrated its 20-year anniversary** by packing the Golden State Theatre with members and friends including 10 members from UUCMP, which is celebrating its sixth year as a COPA member. We heard testimony from many elected local officials thanking COPA for its role in speaking up for poor working families in Santa Cruz and Monterey Counties.

### **August Leadership Retreat.**

**COPA Leaders from Santa Cruz and Monterey Counties met at a day long Retreat held on Aug 26<sup>th</sup> at the St. Francis Retreat Center in San Juan Bautista, CA.** The focus was on training for relational meetings, a foundational practice of the Industrial Areas Foundation, of which COPA is an affiliate, in establishing one-on-one relationships as an important predicate to working effectively for social change.

### **Strategic Planning: Workforce Development**

**Salinas Inclusive Economic Development Initiative (SEIDI).** The James Irvine Foundation of California is funding this new initiative in five California communities: Fresno, Riverside, Salinas, San Bernadino, and Stockton. The purpose is to reduce worker inequality. These communities were selected because they have a disproportionate share of low-income workers who are also persons of color. This initiative will focus on the development of careers in agriculture that pay a living wage. The Salinas Initiative is being supported by nine local non-profits and other supporting organizations that include the University of California at Santa Cruz and COPA. The nine organizations are:

- ALBA (Agriculture and Land-Based Training Association)
- Building Healthy Communities
- CCA (Center for Community Advocacy)
- Centro Binacional Para El Desarrollo Indígena Oaxaqueño (CBDIO)
- Hijos del Sol
- Loaves, Fishes and Computers
- Monterey Bay Central Labor Council
- Mujeres in Action
- Rancho Cielo



**In August Housing Plan Review.** UUCMP helped plan and organize the Housing Civic Academy on Apr 1<sup>st</sup> in Pacific Grove, follow-up discussions on the Monterey Draft Housing Element were held on Aug 24<sup>th</sup> by members of the Monterey County Housing Task Force of COPA.

**October: Affordable Housing at UUCMP**

There have been changes in California, recently signed into law in 2023, that allow housing as a matter of right on church property. Studies by the Turner Center for Housing Innovation at Cal Berkeley have estimated that there is enough land owned by California churches to accommodate all the state's affordable housing needs. Further, it's land generally situated in areas where you would want affordable housing with clean air, access to services, low crime, and ease of transportation.

At the Strategic Planning Session held at our church at the end of 2023, there was substantial interest in exploring the possibility of building affordable housing on our church property. A small informal group began to meet to explore the feasibility of such development. We are still at the initial phases. There will be plenty of opportunities ahead for thorough discussion by the congregation and church leadership as to whether this is a path that would help fulfill the church's mission.

**November: Affordable Housing Report to the UUCMP Social Justice Committee, Nov 5<sup>th</sup>**

Our new COPA organizer from Houston, TX, Eli Holliday, spoke along with Jan Lindenthal Cox, also a COPA member from Unity Church in Monterey, and a non-profit housing developer who worked with St. Stephens Lutheran in Santa Cruz, also a COPA member, on the development of 40 units of affordable housing for the elderly. Also present was UUCMP member and architect Ken Turgen who was able to speak to the changes brought about by the newly enacted California legislation, known as YIGBY, that allows churches, that meet the land requirements to build affordable housing as a matter of right. Below are the questions asked and the answers given.

- 1. What would be the financing and timing of affordable housing?** Jan explained that the financing of affordable housing is very complicated. She offered to come back and do a more detailed workshop on this topic for anyone at the church who would like to learn more.
- 2. Would the church manage the housing, or would we sell off part of our property?** Jan explained that she had worked with many churches in California considering affordable housing development. Most of them have looked for a developer to put together the project funding that can include many sources which taken together make the project financially viable over the course of its expected existence. The property is frequently managed by a separate firm financing for which is included in the project finances. The church executes a long-term lease but retains ultimate ownership of the property.
- 3. Who would benefit from this project? Would the church benefit, besides the residents of the housing?** California, like many states, is experiencing a housing crisis that some have described as an existential problem as there are not sufficient homes for our

workers. The church would also benefit financially from the project as recompense for the land we would offer, probably as a long-term lease, thus obviating the need for the developer to have to purchase land. The fact that churches can build as a matter of right means the developer does not have to undertake the costly, time-consuming, and potentially contentious process of public hearings. Eli Holliday reported that St. Stephens Lutheran in Santa Cruz was paid approximately \$2 million for a 99-year lease. They used these funds to make other improvements to their church property.

4. **What about utilities, power, sewer, water, parking? How can those issues be resolved?** All of these are important details that would have to be effectively resolved during the design phase of the project. However, Ken Turgen, who is an architect in a Monterey firm, and a church member who has been very involved in past construction projects at the church, believes these issues are soluble. He has also done affordable housing in Monterey and in his preliminary analysis to date has not found any one of these to be an insurmountable problem. All of these facets of development will have cost implications for any project.
5. **Are we talking about building houses or apartments?** This is still open to discussion and design and ultimately for the congregation to decide. However, Jan explained that the more units that we can accommodate, the easier it will be to make the project financially feasible.

**What about the trees on our property, will they be protected?** We talked about the beauty of our land as one of the things that would make it desirable as a place for people to live, as well as its accessibility to nearby services at CHOMP and Del Monte Shopping Center. The tension may come in building enough units to make the project financially feasible while doing so in a way that best preserves our trees and land.

#### **February 2024 Meeting of COPA Monterey Housing Task Force with City of Monterey Planning Dept.**

On 2 Feb 2024 Laura Nagel and other members of the COPA Monterey Housing Task Force met with Kimberly Cole, Director of Planning for the City and her staff to discuss the housing element and Task Force's recommendations for modifications to the draft plan and a longer term working relationship between the City and the Task Force.

#### **April 2024 Meeting with Social Justice Committee to Restore COPA Dues**

On Sunday 7 Apr Laura and Karen Judkins, Co-Chairs of the COPA Core Team, met with the Social Justice Committee to request COPA's budget be continued at \$5,000 per annum. The Social Justice Committee voted to approve this and sent a motion to the board requesting that the budget amount be changed to reflect continued payment of the full amount of our dues, the request for which is 1% of our operating budget. COPA will work to increase volunteer involvement.

May 14. Planning a meeting with Santa Cruz churches that have built housing on their land. Volunteers are welcome to meet, ask questions, and help report back to UUCMP.

## Stewardship Committee

Konny Murray

**Members:** Konny Murray, Chair; Steve Johnson, Secretary, Carol Collin, Gretchen Hausmann, Bjorn Nilson, Jo Ann Novoson, with financial advice from Treasurer Robert Brunson and spiritual advice from Rev. Axel Gehrmann and ongoing support from Judy Lind (Emeritus)

What an amazing BE THE LIGHT canvass/annual fund drive we had for the 2024/2025 fiscal year. That's because so many congregants stepped up to increase their pledges by 25% or more and others joined the ranks of 5%ers, including new members! THANK YOU ALL!!!!

As of the writing of this report, our total pledges are \$428,5667.75, 89.5% of our pledging goal. The amount is 10% more than pledged last year in total! 99 households have pledged thus far. At this time last year, 109 had pledged and we ended up with a total of 110 pledgers for the year. Our goal (\$480,000) is daunting, and I believe we will get even closer as the few folks who haven't (around 7) decide to pledge. Fourteen households have let us know they are unable to pledge now for various reasons.

43 of us increased our pledge by 25% or more and 24 of us said they are 5%ers (that's a substantial increase in 5%ers). The challenge match stands at \$46,671.75. It's an amazing feat, thanks to us! (The challenge is closed and we welcome pledges at any time!

Special thanks for Steve Johnson who has been the campaign's tracker/bean counter (he calls himself a green eye-shade guy). Breeze, under Steven's watch is working well. Many of us pledged online! It is so much easier for our recording keeping when that happens. So **thank you to those who pledged online.**

And thanks to the Finance Committee for tightening up the accounting records so we are confident of where we are. And, of course, thanks to the stewards who contacted everyone to find out how they are feeling about UUCMP and to remind them to get their pledge info in, online if possible.

Thanks to my stellar committee for all their support. Jo Ann with her creative ideas and soft touch on suggesting changes, Gretchen for putting together a star cast of testimonial givers (the testimonials are greatly appreciated by us all – we enjoy learning why folks are part of the community), Carol for her steadfastness in helping round up straggling non pledgers and for all her masterful editing of articles, Bjorn for his good questions as to why do that or why not do this and cheerleading of the group. Axel for keeping us centered on our mission. Robert for reminding us of why we are doing this. (Judy Lind has backed away from deep involvement in the committee, and her long influence remains as Steve reenters all her records into Breeze.) Judy was Konny's mentor, confidant, and teacher when she first started chairing the committee.)

During the campaign, we had six inspiring testimonials delivered as part of worship by Lauren Keenan, Ted Raabe, Fred Hamilton, Edmund Pendleton, Suzy Worcester and Peggy Hansen. The stewards this time were: Be Astengo, Robert Brunson, Carl Christensen, Carol Collin, Jon Czarnecki, Warren Finch, Fran Gaver, Rev, Axel Gehrman, Lee Hulquist, Paul Jessen, Lauren Keenan, Mike Lovell, Maren, Martin, Mibs McCarthy, Bjorn Nilson, Konny Murray, Wanda Parrott, and Don Reynolds, They all deserve a standing ovation.

We kicked off the campaign with a celebratory BE THE LIGHT cake on Feb. 19. The last day of the campaign was Mar 31. The clean-up crew that last week was Mike Lovell, Carol Collin, and Konny Murray .... contacting non pledgers to urge them to get their pledge in if they planned to pledge or to let us know if they were unable to do so. It created a sort of end of campaign rush!. Pledges are continuing to straggle in – it is never too late to pledge (or to pay your pledge!). Pledge forms are available on the end of the cabinet that holds our name tags.

The committee will have new leadership starting next campaign., Konny Murray is resigning after nearly 15 years at the helm. Planning for 25/26 will begin in September. Always, the committee members appreciate suggestions on what we need to do to make the process more comfortable for everyone. You'll begin to hear about plans in the fall.

### **Super Flea**

Mibs McCarthy

After a several year hiatus we held a very successful Super Flea Sale in early September. We raised \$3,873, and contributed to the recycling and repurposing of many gently used items. Many thanks to all who helped! Lauren Keenan will take over the leadership for next year.

### **Worship Associates Team**

Kathleen Craig

Worship Associates meet monthly and hold twice yearly retreats to plan worship themes and topics.

Worship Associates this past year have included:

Celia Barberena, Corey Brunson, Max Cajar, Kathleen Craig, Micah Forstein, Page Galloway, Ann Jacobson, Lauren Keenan, Ray Krise, Molly Lewis, Shannon Morrison, Bjorn Nilson, Kathleen Sullivan, Christina Zaro

Staff members who met with WAs included Revs. Axel and Elaine Gehrman, and Sharyn Routh

## **Affinity Groups & Special Interest Programs**

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### **Antiracism Book and Film Discussions**

Rev. Elaine Gehrmann and JT Mason

We held several discussions this year in conjunction with Whites for Racial Equity. We watched the movie “Stamped from the Beginning” based on the book by Ibram Kendi. We discussed Michele Norris’s book “Our Hidden Conversations.” We discussed the Ava Duvernay film “Origin” based on Isabel Wilkerson’s book “Caste” and the movie “American Fiction” based on Percival Everett’s book “Erasure.” Our last film for this year will be “God and Country” about Christian Nationalism.

### **Buddhist Sangha**

Dennis Hamilton

Host: Rev. Dennis Hamilton

Wednesdays 7-8:30 pm

The Buddhist sangha is a covenant group that meets each Wednesday in person in the sanctuary and on Zoom. Activities include a twenty-minute meditation, recitation of vows and chants and a reading of a dharma talk on various aspects of Buddhism, followed by discussion and reflection. The purpose of the sangha is many-fold. We meet to understand Buddhist teachings better, to internalize them and incorporate them into our lives so we learn to live them out each day. The sangha is also a support group for members.

Each week the mailing list receives a new dharma talk by a recognized Buddhist teacher, and a commentary from Rev. Hamilton. There are now 67 recipients on the mailing list. Each week the sangha averages about 12 attending the sangha in person and two or three by Zoom. The sangha was established in 2014, entering its tenth year. Membership is open to anyone seeking to understand the dharma better.

### **Men’s Breakfast Group**

Mike Lovell

All men are invited to the UUCMP Men’s Breakfast. We meet from 8:30 to 10:30 on the second Saturday morning of each month. The meeting is now hybrid. Those of us meeting in person gather at 8:30 in the fireside room, and those choosing Zoom join us at 9 o'clock. Our breakfast is somewhat potluck, as coffee is made at the church and volunteers bring pastries, fruit, bagels, juice, or whatever they choose. We take a donation to pay for our coffee and room use. We each check in and talk for 5 minutes or so on whatever subject we wish and then we have an open discussion. Our group has grown some this year, we enjoy meeting together, and we look forward to new members.

**Soil Mates**

Kathleen Craig

Members: Simona Bartl, Kathleen Craig, Lois Davidson, Meredith Harrill, Lee Hulquist, Karen Judkins, Lauren Keenan, Molly Lewis, Kerry Sisseem and Barbara Woodruff

Activities during 2023 included: taking turns hosting our gatherings in the gardens of our members; going to the UCSC Botanical Gardens and Arboretum for a tour; propagating, growing, purchasing, organizing and planting California native plants for the beautification of the UUCMP campus; holding a tour of member's gardens which was a donation for the UUCMP Services Auction, and planting and maintaining decorative pots of succulents at the church entrances.

**Tai Chi Chih**

Mary Kay Hamilton

Our ongoing Tai Chi Chih class continues to be grateful to be able to meet in the church. We gather each Tuesday at 4 p.m. to participate in this gentle moving meditation. We are led through a series of easy to learn movements by our accredited leader, Julie Anongas. We request an optional \$5.00 donation to the church from each participant each session. We can have between 3 and over 12 at any one class. We encourage drop ins. A few of the participants have even joined the church recently. For questions, contact Mary Kay Hamilton at [marykayhamilton2@gmail.com](mailto:marykayhamilton2@gmail.com)