

Unitarian Universalist Congregation of Charlottesville
BOARD OF TRUSTEES MINUTES
Oct. 28, 2025
Meeting hosted on Zoom

In attendance – Rev Leia Durland Jones, Rev Tim Temerson, Bev Ryan, Tammy Wilt, Kim Grover, John Griffith, Ellie Syverud, Achsach Carrier, Carol Gardner

Absent – Jimmy Gorham

Guests – Donna Redmond

I. Opening - (20 mins)

- Opening and Closing Words: Tammy Wilt
- Reporter: Ellie Syverud
- Time Keeper: Achsah Carrier
- Process Observer: John Griffith

Reporter To be done within a week of the board meeting. When you are the Board Reporter you can post your notes directly to the website with this link: <http://uucharlottesville.org/post> and someone from the communications team will review it and put it online. You can also send the text to communications@uucharlottesville.org and ask them to post to the website.

1. Opening Words -
2. Check-In: one to two minute check-in:
3. Community Time / Public Comment - -
4. Acceptance of Agenda

MOTION: to Accept the agenda

5. Written Correspondence - Walter wrote in regarding thank you note recognition.

II. Electronic Motions (1 minute)

Approval of the September minutes - Done electronically

1. **Reports (20 min)** -
2. **President's Report** (written)- Carol Gardner -
3. **Vice President's Report** (Oral) - Beverly Ryan - Upcoming auction on 11/15 - services and items
4. **Treasurer's Report** (Written) - Jimmy Gorham

5. **Lead Minister's Report** - (Written) - Rev. Tim - combining with SoJourners in Nov for a short period.
6. **Minister of Faith Development's Report** (Written) - Rev. Leia Durland-Jones - had a wonderful pumpkin carving event.
7. **Membership Report** -Rev Tim
Membership stands at: 319 as of Oct 28, 2025, The decrease from September's numbers is due to cleaning up Breeze.
8. **Board Liaison Reports**
 - Nom Committee: (Oral) John Griffith- no updates at this time
 - Personnel Committee (Oral) - Beverly Ryan - Benefits tune-up package from UUA to ensure benefits are in line. This was reviewed by the committee. Cost of living is now 2.8%
 - Communications Committee (Oral) - Achsah Carrier - We are going to be migrating systems to Google to help with crashing issues and costs.
 - Building Committee (Oral) - Kim Grover - Moving forward with purchasing a new water heater to replace the current, aging one. We have estimates for the Parking lot repair and patch vs total rehaul. The Buildings Committee is considering the best near and long term solutions.
 - SSC - Ellie Syverud - Concerns about rising healthcare costs and pledge payments. This could impact the budget moving forward. Database updates moving forward. Working on a planned giving policy - and they would like that to be on the agenda for November.

BREAK AND GRATITUDE CARDS (5 min) - Please think of people the Board should recognize for their recent contributions to our church community. Donna Redmond, Rowan Doran.

IV. Business (40min)

- **Discussion on replacement board member to finish Chris Little's term (5min)** - Carol Gardner - According to the Bylaws - a replacement nominee, for an at-large member. The board, in consultation with the nominating committee, will appoint a new board member, until the next congregational meeting in June, 2026.
- **Update on Home School Rental (2min)** Carol Gardner *The homeschooling group (CHEC) which has been renting from us has provided their notice that they will not be returning in January. Although no reason was given, we had requested an increase in their rental rate recently in order to more fairly compensate the church. The Treasurer's report details the expected loss of revenue from this change.*
- **Approval to add the operations manager to set up the automatic withdrawal for UUA Healthcare payments (2min)** - Carol Gardner - Achsah Carrier moved to accept and Tammy Wilt seconded and it was approved: *Exception to check signing policy. The current policy manual requires two signers on checks over \$3,000, with at least one being a Board of Trustees member. At the recommendation of the Finance Committee,*

the Board grants an exception to this to allow the Unitarian Universalist Association or its insurance administrator to pull our routine health/dental insurance payments directly from our bank account, even if it exceeds \$3,000. The amount to be pulled will depend on our staff and their coverage, and may also include employee contributions from payroll withholding. The Board authorizes our Operations Manager to set up this withdrawal with our bank.

- **Emergency Preparedness Review (15min)** - Donna Redmond - Next step is to likely set up a committee with some subgroups to start working on fleshing out the different areas. We should also reach out to other local associations for input. A board member to be on the committee to report back to the board. Ministers will meet with the volunteer coordinators to come up with some names for possible members
- **Developmental Ministry Plan 3-7yr (5min)** - Carol Gardner - Developmental Ministry Plan 3-7 Years - Carol Gardner - We had a brief discussion of the developmental ministry, which may last anywhere from 3 to 7 years depending on the needs of the congregation and the minister. We are beginning year 4 of the developmental ministry, but are very much in the middle of our strategic plan, so don't feel we need to address changes to the developmental ministry at this time. The Board will continue to work closely with Rev Tim, and will revisit this on a regular basis.
- **Musical Survey Review (5min)** - Carol Gardner - Motion to approve the survey with revisions to/and or omission of "children" question before survey is released and with a clear end date of survey no longer than 30 days from date survey is sent out. Kim Grover moved and John Griffith approved. Motion was approved.

VI. Closing Activities (5 min)

1. Process Review – Ran a little long, however, the meeting was productive
2. Things to do / communicate - Planned Giving Policy
3. Closing Words

Dates to remember

Next UU Charlottesville Executive Board Meeting: Dec 3, 2025

Next UU Charlottesville Board Meeting: Dec 9, 2025

Reports to the Board

October 2025

The Board met for our annual retreat in September 2025. In addition to getting to know each other better, we spent a lot of time discussing the strategic plan, our progress so far, and our priorities for this year. Two members of the Committee

on Ministry (COM) attended to help walk us through the plan items and give progress updates.

We also asked the COM to help update the congregation on our progress on the strategic plan, and they have begun a series of articles in the newsletter and on the website, broken down by section of the plan.

Rather than reiterating the pieces of the plan that have already been completed, I will highlight here the pieces we continue to work on, and those we want to start on this year. These are our priorities for the current congregational year.

[Post Board meeting revisions are highlighted]

Preamble

: New this year: Now that we have Volunteer Coordinators identified, we hope to work on getting a better understanding of the skills, experiences and volunteering interests of the congregation. To that end, a survey will be coming. This will help us identify more people to lead or support items in the plan.

: New this year: The Stewardship Steering Committee has designed and launched a Planned Giving Program to inform the congregation about how legacy giving can help ensure UUCville's light of love and justice shines far into the future.

: Continuing: We have made significant progress in this area, and continue our work via the Committee on Ministry, the Stewardship Steering Committee, and the new Volunteer Coordinators.

Part 1 – Safe and Welcoming Place

: New this year: create the Buildings and Grounds Plan task force. They are just beginning their work, and will involve stakeholders and the congregation in the process this year.

: New this year: we are working on assessing the safety and security of the congregation, with an eye toward making necessary improvements. In the current political climate, it is critical to improve our resilience.

: Continuing: re-energizing the Greeter Program, we have begun adding more volunteers and held a training session recently.

: Continuing: supporting our Young Adult community – this is ongoing, but could use more support.

Part 2 – Nurturing Heart, Mind, Body and Spirit

- Continuing: consider our ability to expand the scope of “caring” we do (like CareNet) to include additional aspects. Needs assessment, leadership and support.**
- Continuing: Our Fun and Friendship Team needs additional leadership and support to continue the social activities we enjoyed last year.**

Part 3 – Equity, Justice and Peace for All People

- Continuing: although the plan was written before the current presidential administration, several items of this section of the plan are supported by the work of the Mosaic Squad. We feel this is critical work, given the current political climate.**
- Continuing: we are strengthening and expanding our partnerships (e.g. City of Promise, Sin Barreras, Ebenezer Baptist Church, PACEM, IMPACT and the Haven - maybe add Charlottesville Public Housing Association (PHAR) and Equality Virginia, and Blue Ridge Abortion Fund).**
- Continuing: we continue to offer many Adult Faith Development classes that support this section.**
- Continuing: we continue to align our Social Action giving with the several focus areas in this part of the plan (racial justice, immigrant/refugee rights, reproductive rights, Health Equity, Homelessness, Food Insecurity, and LGBTQ+ issues - we don't have a social action collection with LGBT issues, though we support it especially with Charlottesville PRIDE).**
- <https://uucharlotteville.org/social-action-collections-2025-2026/>**
- July 2025 – City of Promise: Racial Justice**
- August 2025 – Birth Sister: Health Equity**
- September 2025 – PACEM: Homelessness**
- October 2025 – The Haven: Food Insecurity and Homelessness**
- November 2025 – Sin Barreras: Immigrant/Refugee Rights**
- December 2025 – Public Housing Association of Residents (PHAR): Affordable Housing**

- January 2026 – Impact: Advocacy/Enhance the Knowledge Base of the Congregation
- February 2026 – UUCville Food Ministry: Food Insecurity
- March 2026 – UUCville Meal Packets: Food Insecurity/Family Support
- April 2026 – Blue Ridge Abortion Fund: Reproductive Rights/Justice

Part 4 – Equity, Justice and Peace for the Planet

- The Ministry for Earth (MFE) team could use additional support on many of these items.
- New this year: develop an ongoing partnership with a local environmental group.
- New this year: coordinate with the Buildings and Grounds Plan task force to ensure that sustainability is in the forefront of all infrastructure modifications and improvements.
- Continuing: promote and encourage church participation in community work days with local environmental organizations.
- Continuing: host sustainable potlucks to encourage health, planet sustaining habits.
- Continuing: research upcoming climate legislation, meet with local legislators to advocate for specific policies, table for post cards, and organize letter writing events.
- Continuing: enhancing environmental education and encouraging actions to support sustainability through a monthly newsletter and adult programs.

Submitted by: Carol Gardner, President

Vice President's Report to the Board: Bev Ryan
 N/A - Oral
 Bev Ryan

Submitted by, **Beverly Ryan**, Vice President

Treasurer's Report to the Board: Jimmy Gorham

Treasurer's report, October 2025

Greetings to the Board and the Congregation.

In this report I review the following

1. Highlights, October Finance Committee Meeting
2. Monthly Financial Reports (Sept. 30, 2025): Budget versus Actuals; Statement of Financial Position
3. Budget ups and downs

Highlights, October Finance Committee Meeting

- FC approves Sandra's suggestion to open a Money Market account at UVA, which offers higher interest rates than a Savings account, while maintaining liquidity.
- FC recommends that the Building Committee conform to the following in accessing funds:

“The Building Committee may wish to pursue one or more special projects that require additional funding beyond that in the congregation-approved annual budget. In such cases, the Finance Committee recommends that the Building Committee initially turn to the Bristol Fund, rather than to the Buildings & Grounds Reserve Fund. The Bristol Fund is supported by a trust that replenishes its funding annually. The Buildings & Grounds Reserve Fund is not automatically replenished, and should be accessed by the Building Committee only for projects considered to be urgent / emergent.”

- Sandra is approved as sole payer for the monthly UUA benefits expenses, eliminating the requirement for a second signature each month for this predictable, recurring expense. When this change is implemented, the UUA can automatically draft this payment.
- FC supports the new Planned Giving Policy submitted by Kay Frazier for consideration. The committee recommends a change in one paragraph that was unclear as originally written, and has emailed recommended text to Kay.

Monthly reports

See two separate Excel documents for Budget v. Actuals, and for the Statement of Financial Position; these have been prepared by Sandra from Quickbooks.

As in previous Treasurer's reports, I have prepared my own version of the SOFP (see separate Word document), for those who may prefer to look at these in this format; the numbers should be identical to those in Sandra's report.

These reports are pasted at the end of this document.

Budget ups and downs

I highlight a few line items of the "actual" budget that are significantly, and unexpectedly, positive or negative, and offer explanations to account for the differences from the adopted budget.

Ups

1. 4130 Prior Year Pledges FY 2024-25
 1. Pledges from last fiscal year that did not get fulfilled (paid) in that fiscal year. We budgeted that this year we would get \$3000 of those unfulfilled pledges, whereas we have actually received \$8,411, for a net positive to the budget of \$5,411.
2. 4430 Yard Sale
 1. We budgeted revenue of \$7,500, whereas the actuals were \$15,147, yielding a net positive to the budget of \$7,647.

Downs

3. 5612 Health Insurance
 1. We learned earlier this month that our Health Insurance premiums (through the UUA) will rise by 19.5%, beginning in January.
 2. In our adopted budget, we had already budgeted an anticipated 10% increase.
 3. Sandra has calculated the net difference; for this FY (Jan through Jun), we will need an additional outlay of \$7,090.
4. 4510 Building Use Fees
 1. We learned that the CHEC (home schooling) group has identified a different site to use, and will no longer be renting space at UUCville, as of January.
 2. Sandra estimates the loss of income for the Jan-Jun period at \$8,300.

For those keeping score, the net total for these four items is -\$2,332 compared to budget.

I regret that I cannot be present at the October Board Meeting.

Thank you, Jimmy G, UUCville Treasurer.

Lead Minister's Report to the Board:

Lead Developmental Minister Report

October 2025

Although we experienced something of a setback after learning that our largest renter is moving to another location in January, we continue to experience positivity, joy, and growth at UUCville. I am especially pleased by the progress we have made implementing the long-range plan, including creating some of the key "infrastructure" that is essential for turning our ambitious goals into action. I feel we are very much "on-track" and I am looking forward to the coming weeks as we complete what has been a very active and consequential 2025.

In terms of the loss of rental income, there is no doubt that while the homeschool group's (CHEC's) decision to relocate presents a challenge, it also creates an opportunity to reimagine how we might utilize our space. I will work with Nash and the Board to seek out new renters, whether that means another school or a combination of smaller groups that will help us replace the lost income. I believe that thanks to some of our very successful fundraising efforts (like the yard sale), it is still likely we will end the fiscal year in the black.

In terms of specific programs and ministries, I am very pleased that our covenant group coordinator, Diana Scott, quickly followed up on the sign-ups she received at the Service Fair and launched a new covenant group. The group is already meeting and is comprised of newer members, which is also a wonderful way for them to get connected.

The Sin Barreras Pre-K class is also off and running. Our new security measures (keeping doors locked) are working well and causing very minimal disruptions thanks to our dedicated volunteers. We are still working on increasing the number of kids and families and early attendance has been lower than expected. But, with time and greater familiarity with the church, I am confident attendance will improve....I will also add that the church served as the venue for a Sin Barreras fundraiser, "Bowls and Bunuelos," this past Saturday. Again, it speaks so well of our mission and values that we offer our space to a very deserving partner that is doing extraordinary work.

I also want to lift up the incredible leadership of our **Mosaic Squad**, which is certainly living up to the ambitious charge you gave them last month. The Mosaic Squad organized our UUCville presence at the No Kings protest on October 18. Both Rev. Leia and I were on vacation, and it was a joy to see Linda Dukes and others coordinate rides, parking, a meeting location at Stonefield, and more. Our congregation has also been donating meeting space to Indivisible Charlottesville, which has been offering trainings in the Social Hall throughout the month of October. Frank Dukes of the Mosaic Squad has taken the lead on this initiative. Finally, the

small group of community folks who make signs for Indivisible protests once again used the Social Hall. I am very pleased that so many in the community are beginning to see UUCville as a meeting place for Indivisible and the broader resistance to authoritarianism.

Let me conclude by talking about the significant gains we have made in getting the infrastructure of the long-range plan in place. It is such a big deal that we have a talented Committee on Ministry (COM) and hard-working volunteer coordinators. The plan will not succeed without these essential roles being filled and we could not have found more gifted and passionate leaders for both. With recent changes to our staff and now with the COM and volunteer coordinators in place, we are organized for success at UUCville!

Finally, a word of gratitude to Chris Little. Chris has been an invaluable leader in helping the board and the church take a big picture, long-range approach to living our mission. I'm also so grateful to Chris for his passionate commitment to proximity, a commitment I share and that I believe we are beginning to live with our community partnerships. Chris, thank you for all that you have shared with me and our congregation. You are truly an inspiration!

With Gratitude,

Rev. Tim

Rev. Tim, Lead Minister

Minister of Faith Development's Report:

Report to the Board October 2025

Rev. Leia Durland-Jones, Minister of Faith Development

Religious Education Programming for Children & Youth RE

Our fall semester is well underway. Our children's "Growing Anti-Racist UUs" curriculum is being skillfully and lovingly taught by our RE volunteers. We've been exploring important topics including skin shades, identity, empathy, equity/inequity, and slavery. Exploring these lessons with our children seems more important than ever.

Our youth programming is strong with a robust OWL class of nineteen youth and five advisors. They just had their first lock-in and all reports are that a fun time was had by all! YRUU has been meeting weekly and exploring a variety of timely topics. They had a late night at church event (like a lock-in but not overnight.)

Sunday "Second Hour" continues to be an important part of Sunday mornings for families in our congregation. Childcare is provided on the playground from 12:30-1:30. This allows parents to attend newcomer sessions, committee meetings, our UU Parents Group (UUPs), and to just meet and talk with other parents.

Parent's Night Out

Our first ever Parent's Night Out is Friday October 24 from 5:30-9PM. Our hope is to give parents an evening to reconnect with themselves and each other while their children (infants through sixth grade) are lovingly cared for at church. We provide dinner, snacks, and fun activities for the kids. Katherine Jenkins Djom is offering a body movement yoga activity for children who are interested.

Adult Faith Development

Participation in our AFD offerings this fall has been robust. Patty Wallens and I are very much enjoying teaching "Facing Death with Life" and look forward to offering additional session on different topics of this class in the winter and spring.

Our Fall semester of AFD includes:

- Facing Death with Life (co-led by myself and Patty Wallens)
- UUA's Common Read *Social Change Now* by Deepa Iyer (led by me)
- Congregational Teach-In "Speak Up!" with Greg Townsend
- Israel/Palestine Learning Circle with Rev. Tim
- Hope in Hard Times Support Circle with Rev. Tim
- Paradox of the Parables with Rev. Kathleen Rolenz
- Anti-Racist Lessons from the Ancestors with Rev. Dr. Wayne Arnason
- Tour of Panorama Farms Natural Burial
- Understanding the Enneagram with Debby Norton
- "Meditation for Twin Hearts" with Jean MacInnis

Ongoing AFD offerings:

Clear Spring Buddhist Sangha, Support Group for those who have loved ones with Dementia, Tai Chi, UU Spirituality Book Group, UU Parents Support Group, Womenspirit

Worship & Whole Church Programming

It was such a joy to rededicate our Peace Pole on October 21, International Day of Peace, and to also have our interactive installation of the "Help Each Other" yard signs. I have enjoyed receiving photos from congregants of their signs, including at intersections around town and in front of homes.

It was lovely to have youth who participated in ASP lead worship with me on October 19.

As I write this report, Rev. Tim and I are planning our multigenerational Ancestors' Sunday for October 26 which is also the Sunday for whole church communal pumpkin carving after church.

Other

Rev. Tim and I continue to meet regularly with the MOSAIC Squad and support and collaborate in their efforts.

I've been meeting regularly with Kay Frazier on Breeze management. Nash, Bryn, and I are continuing to work with new protocols and practices as we prepare to relieve Kay of her role in Breeze management.

Pastoral Care

There have been many illnesses, deaths, and pastoral needs in the last month. Tim and I are grateful to work with our skilled Pastoral Visitors team, especially Patty Wallens and Meg Dunham, to be of support to those in need.

Professional Development & Leadership

I missed the last board meeting as I was away on Study Leave attending the first ever reunion of alumni from The Centre for Holding Space. The Minister's Musing column of October 24 has more information about this fabulous experience.

It was a pleasure to be invited into a generative conversation through the UUA's office of Ministries and Faith Development: Credentialing and Professional Development about the upcoming rewrite of the UUA's continuing education module on UU Identity.

Tim and I both attended the Joseph Jordan Cluster of UU Religious Professionals meeting in Richmond in September. Our congregation hosted the cluster for our meeting on October 21. Special thanks to Sandy Brooks and Tamera Helms for assisting with food and hospitality for this daylong meeting.

Thank you all for your kindness and support regarding Karen's emergency gallbladder surgery. She is recovering well and doesn't seem to be missing that gallbladder one bit!

Rev. Leia, Minister of Faith Development

Membership Report for,

Membership as of Oct_28, 2025 is 319

Additions:

Drops:

Respectfully submitted, Rev Tim Temerson

A Medical Emergency in the Sanctuary on a Sunday Morning

What happens if a congregant passes out or faints, has a heart attack, or has some other medical emergency during worship? First, some background information, and then an outline of specific responses.

It Is Our Policy to Call 911

One question that comes up over and over again – should someone call 911 and if so, who? We know that there are some members of the congregation who have DNR orders and have stated their desire that the church *not* call 911 should a medical emergency involving them occur. (? Still true? If so, this list must be available) While that may be an individual's preference, **IT IS OUR POLICY TO CALL 911 IN A MEDICAL EMERGENCY.** It is better for the congregation as a whole to see that appropriate care is provided.

There Are Resources in the Church Office

To be prepared, the Church Staff and the Chair of the Membership Committee will compile an initial list of congregants with medical training who agree to be called on in the case of an emergency. This list will be prominently housed in the Church Office (in the clearly marked “Emergency Protocols” notebook – see Appendix B), and will include the service this individual usually attends, the RE class she or he teaches, etc., as well as their level of training. The Office Assistant and the Chair of the Membership Committee will work together to update this list yearly.

There will be list in the Church Office of the location and type of all fire extinguishers in the building(s). This list will be included in the “Emergency Protocols” notebook.

About First Aid Kits

The Church will also have well stocked First Aid kits in several locations:

- A large kit in the mailroom
- Smaller kits will be situated in the <to be determined> in the lower hall; on the wall outside of the <to be determined> classroom on the 2nd floor; in the Rugby Road foyer; and in the main entrance to Summit House.

The locations of each of these kits will be noted on the building maps (located on each floor and in the Church Office) and will be well identified with a clearly placed red cross. The placement of fire extinguishers will also be noted.

In the Event of an Emergency

In the actual event of an emergency, different people will play different roles, and this makes it vitally important that each person knows not only their role but also has an understanding of the overall plan so that they know how their part fits in with the whole. The individuals identified below will meet at least once a year to review the plan and to assess areas that need reworking.

1. **The Worship Leader – will assess the situation** and make the choice whether to continue the service or whether to put the service on hold until the emergency is addressed. She or he will make contact – visually or verbally – with those who are

addressing the emergency more directly. If the service needs to be halted, the Worship Leader in partnership with the Music Director (or the musician of the morning) will lead appropriate congregational singing. (e.g., Spirit of Life – 123. Meditation on Breathing – 1009. Filled With Loving Kindness – 1031.)

2. **The Head Usher** for the morning – **will** be the “point person.” Undoubtedly people near the ill congregant will, on their own, **respond to the situation**. People with medical expertise will likely make themselves known and available. The Head Usher’s primary responsibility will be to see that communication is clear and effective.
3. **The Secondary Usher** for the morning – **will** be the person designated to **call 911** should the emergency warrant it. She or he will also be available to do whatever else might be called for, at the request of the Head Usher. (For example, go to the office and find the list of congregants with medical knowledge, or go get a First Aid Kit.)
4. A **member of the ministry staff** **will fill out the incident report** (see Appendix E)
5. Church Staff, in consultation with the Board President, will decide on the proper way to inform the congregation (if warranted).
6. **The Ministry Staff will** collaborate on any needed pastoral response and **follow-up**.

Thoughts about the writing/layout of the plan

The *Draft Emergency Preparedness Plan* represents a lot of hard work and is a good starting place. However, I'm suggesting that it be used and/or reorganized but not simply edited. Partly this is because so much has changed since it was drafted, but also because a more effectual organization and layout would ensure less confusion during a time-sensitive event.

The *Draft Emergency Preparedness Plan* includes explanations, policy statements, and procedural steps all together, making it difficult to see what the procedural steps are. I'm suggesting that all of this be included, but making it easy to separate out the procedural portions on their own. In an emergency, these procedures need to be the quick checklist that is referred to. Also, inventory lists for emergency supplies should be easy to find, and so on.

Presidential Policy Directive (PPD) 8 defines preparedness around five mission areas: Prevention, Protection, Mitigation, Response, and Recovery. The first three are primarily "before" the event, while Response and Recovery are "during" and "after." If the plan is organized with these areas in mind, it would make it easier to pull out the discrete procedure checklists and collect all in a separate binder for quick reference. I'm also suggesting that there be a separate section for follow-up, reporting, debriefing, counseling, etc., since it should be the same (or at least in one place), regardless of the event.

Consistency is also important. In the draft section on Medical Emergencies, it's stated that the policy is to call 911. The procedure section says that the call to 911 will be made if deemed appropriate. Calling 911 is also mentioned in the sections on intruders. It's not mentioned in any other emergency...

The *Draft Emergency Preparedness Plan* assumes that this plan will be linked to the existing *Disruptive Behaviors Policy* for a comprehensive *Safe Congregation Policy*. Instead, I'm suggesting that the *Disruptive Behaviors Policy* be integrated into the *Emergency Preparedness Plan*, as a part of the section on *Intruder(s)*. Actions should be the same for a disruptive person, whether they are a member or not.

The incident on Sunday, August 1st at St. Paul's Church showed how the congregation reacted well to the intruder. What they did was de-escalate the situation, which is a very useful skill to have. I would recommend considering this training as part of our plan.

Emergency Event	Understand the situation (risk assessment)	Determine goals and objectives and develop a plan of action					Share with congregants, hold training sessions, and hold drills	Review and update plan regularly
		Develop clear steps to follow in an emergency	Map the communication network	Safety equipment and supplies: what, where, who	Quick reference charts, signs for evacuation, location of supplies, etc.	Develop recovery plan, incident report, follow-up, etc.		
Medical emergencies	✓	Draft	Draft	Draft				
Intruder(s)	✓	Draft	Draft					
Fire	✓	Draft	Draft					
Earthquake	✓	Draft						
High wind event	✓	Draft						
Flooding								
Hazmat								
Computer attacks, spam, hacking, sensitive information								

Thanks for bringing that to our attention Achsah. We first sent information about the survey out last year in September 2024, but all we were advised to do at the time was to use Google forms instead of other methods by Revs Leia and Tim. At the time our dates of implementation were November 1st-30th 2024, and now they are October 1st-31st 2025. The purpose of the survey is as stated in the survey (drafted by music director Scott Deveaux):

We [the music committee] would love to know more about your engagement with music: your tastes in music, your own engagement with music performance (singing, playing guitar, or other instruments), and other aspects to music in the church (such as a children's choir) you would like to support or participate in.

With this survey the music committee aims to better understand the current role of our music ministry as seen by the congregation, and also learn how we might grow or adjust the program to better serve our community.

Since there is not a survey committee, would the board like to be involved with implementing and managing the survey? Currently it is in Google forms and will compile a spreadsheet with results automatically. As you can see above, the music committee hoped to gather responses via the newsletter, social media, and in person every Sunday for about a month to allow for anyone who wanted to participate to respond. We then planned to have a music committee meeting where we would analyze and discuss the results and how they could impact the music ministry at UU Cville. We would absolutely welcome board involvement in any part of the process.

Let me know the best way to proceed from here!
Sarahfina

<https://forms.gle/MFjNZLYvxs2JvHHc6>

[Treasurer's Monthly report documents:](#)

1. Statement of Financial Position:

Statement of Financial Position	
Unitarian Universalist Congregation of Charlottesville	
As of September 30, 2025	
Distribution account	Total
Assets	
Current Assets	
Bank Accounts	
1000 UVA CCU Checking (80)	0.00
1010 General Fund	119,444.00
1020 Donor Restricted Funds	
1020-01 Adult Faith Development AFD	6,647.00
1020-02 Children's Service Offering	760.00
1020-03 Cluster Conference RJ Funds	153.00
1020-04 Coming of Age	815.00
1020-05 Food Pantry	10,977.00
1020-06 Green Building Improvements	1,036.00
1020-07 IHS Meal Packets	3,064.00
1020-08 Labyrinth Project	713.00
1020-09 Minister's Discretionary Fund	10,101.00
1020-10 Music Programs	414.00
1020-11 Refugee Collection	150.00
1020-14 Special Collection	303.00
Total for 1020 Donor Restricted Funds	\$35,133.00
1030 Board Designated Funds	
1030-01 Building & Grounds Reserve Fund	21,129.00
1030-02 Capital Reserve Fund	983.00
1030-03 Operating Reserve	17,259.00
1030-05 Sabbatical Fund	2,953.00
1030-06 Remembrance Garden	17,215.00
Total for 1030 Board Designated Funds	\$59,539.00
Total for 1000 UVA CCU Checking (80)	\$214,116.00
1200 UVA CCU Savings (00)	56,404.00
1400 CD 12 Months @3.5%	25,615.00

Total for Bank Accounts	\$296,135.00
Accounts Receivable	
Other Current Assets	
1500 UU Common Endowment Fund	763,637.00
1600 Member Bonds	
1610 Bonds Held by Restricted Funds	
1611 Cheetham Bonds Principal (RE)	16,214.00
1612 Bristol Bonds Principal	62,077.00
1613 Abrahamse Bonds Principal	15,642.00
Total for 1610 Bonds Held by Restricted Funds	\$93,933.00
1620 CEF Bonds Principal	16,067.00
Total for 1600 Member Bonds	\$110,000.00
Total for Other Current Assets	\$873,637.00
Total for Current Assets	\$1,169,773.00
Fixed Assets	
1700 Church Building	830,529.00
1710 Church Addition	572,114.00
1720 Church Land	55,000.00
1730 Summit House Building	475,148.00
1740 Summit House Land	150,000.00
1800 Furniture & Fixtures	513.00
Total for Fixed Assets	\$2,083,304.00
Other Assets	
Total for Assets	\$3,253,077.00
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	
Credit Cards	
2030 Ramp Card	102.00
Total for Credit Cards	\$102.00
Other Current Liabilities	
2060 Health Premium WH	2,433.00
2070 Dental Premium WH	107.00
2080 Pension Contrib WH	826.00
2100 Other Liabilities Total	
2120 Public Radio Fund	649.00
2130 Social Action Collections (SAC)	11,683.00

Total for 2100 Other Liabilities Total	\$12,332.00
2400 Reserve Projects	
2401 Buildings and Grounds Projects	
2401-2024-00 Summit House Porch Project	1,399.00
Total for 2401 Buildings and Grounds Projects	\$1,399.00
Total for 2400 Reserve Projects	\$1,399.00
Total for Other Current Liabilities	\$17,097.00
Total for Current Liabilities	\$17,199.00
Long-term Liabilities	
2230 Long Term Liabilities	
2231 Summit House Bonds	110,000.00
2232 No Interest Member Loan	24,000.00
Total for 2230 Long Term Liabilities	\$134,000.00
Total for Long-term Liabilities	\$134,000.00
Total for Liabilities	\$151,199.00
Equity	
Retained Earnings	292,268.00
Net Income	77,766.00
3000 Net Assets (Equity)	2,731,844.00
Total for Equity	\$3,101,877.00
Total for Liabilities and Equity	\$3,253,076.00
Accrual Basis Friday, October 17, 2025 01:23 AM GMTZ	

3. Budget vs. Actuals

Budget vs. Actuals this FY through September 2025				
Unitarian Universalist Congregation of Charlottesville				
Distribution account	Total			
	Actual	Budget	Percent of budget	Money remaining
Income				
4000 Non-Profit Revenue FY25-26				
4100 Pledged Donations FY 2025-26				
4110 Current Year Pledges FY 2025-26	183,460.00	488,250.00	37.57%	304,790.00
4120 Current Year Pledge Match FY 2025-26	9,384.00	12,060.00	77.81%	2,676.00
4130 Prior Year Pledges FY 2024-25	8,411.00	3,000.00	280.37%	-5,411.00
Total for 4100 Pledged Donations FY 2025-26	\$201,255.00	\$503,310.00	39.99%	\$302,055.00
4200 Non-Pledged Donations FY 2025-26				
4210 Current Year Unpledged Donations FY 2025-26	1,175.00	7,000.00	16.79%	5,825.00
4220 Offering / Plate Cash FY 2025-26	2,208.00	10,000.00	22.08%	7,792.00
Total for 4200 Non-Pledged Donations FY 2025-26	\$3,383.00	\$17,000.00	19.90%	\$13,617.00
4300 Restricted Income	15,617.00			-15,617.00
4400 Fundraising Events				
4410 Spring Auction	405.00	6,000.00	6.75%	5,595.00
4430 Yard Sale	15,147.00	7,500.00	201.96%	-7,647.00
4450 Other Fundraising Revenue		2,000.00	0.00%	2,000.00
4455 RaiseRight, Scrip, Kroger Revenue	437.00	1,000.00	43.73%	563.00
4460 Hospitality Contributions	14.00	250.00	5.72%	236.00
Total for 4450 Other Fundraising Revenue	\$452.00	\$3,250.00	13.90%	\$2,798.00
4420 Fall Auction		6,500.00	0.00%	6,500.00
Total for 4400 Fundraising Events	\$16,004.00	\$23,250.00	68.83%	\$7,246.00
Total for 4000 Non-Profit Revenue FY25-26	\$236,259.00	\$543,560.00	43.47%	\$307,301.00
4500 Other Revenue				
4510 Building Use Fees	5,160.00	22,500.00	22.93%	17,340.00
4520 Bank Interest	241.00	800.00	30.15%	559.00
4570 Rebates & Reimbursements	300.00			-300.00
4530 Endowment Transfer		11,800.00	0.00%	11,800.00
4580 Transfer from Operating Reserve		5,000.00	0.00%	5,000.00
4610 CEF Bond Income		916.00	0.00%	916.00
4620 Cheetham Fund (RE)		826.00	0.00%	826.00

4630 Abrahamse Fund (Music)		774.00	0.00%	774.00
4640 Bristol Fund (B & G)		3,259.00	0.00%	3,259.00
Total for 4500 Other Revenue	\$5,701.00	\$45,875.00	12.43%	\$40,174.00
Total for Income	\$241,960.00	\$589,435.00	41.05%	\$347,475.00
Cost of Goods Sold				
Gross Profit	\$241,960.00	\$589,435.00	41.05%	\$347,475.00
Expenses				
5000 Administrative Expenses				
5010 Communications	120.00	3,000.00	4.00%	2,880.00
5020 Multi-Peril Insurance	3,711.00	15,000.00	24.74%	11,289.00
5060 Hospitality	915.00	2,500.00	36.60%	1,585.00
5090 Safety and Security	176.00	500.00	35.19%	324.00
5100 Cleaning & Supplies				
5110 Cleaning Service	4,200.00	21,000.00	20.00%	16,800.00
5120 Kitchen, Bathroom & Cleaning Supplies	326.00	2,000.00	16.28%	1,674.00
Total for 5100 Cleaning & Supplies	\$4,526.00	\$23,000.00	19.68%	\$18,474.00
5200 Office Expense and Supplies				
5210 Office Supplies	653.00	2,000.00	32.67%	1,347.00
5220 Online Subscription Fees	656.00	5,500.00	11.93%	4,844.00
5230 Photocopies and Printing	439.00	2,100.00	20.91%	1,661.00
5240 Postage	7.00	1,100.00	0.65%	1,093.00
5250 IT Support		3,500.00	0.00%	3,500.00
5260 Computer Maintenance/Upgrade		2,000.00	0.00%	2,000.00
Total for 5200 Office Expense and Supplies	\$1,756.00	\$16,200.00	10.84%	\$14,444.00
5300 Utilities				
5310 717 Main Bldg Electricity	1,709.00	7,000.00	24.41%	5,291.00
5320 717 Main Bldg Gas, Water, & Sewer	621.00	4,000.00	15.54%	3,379.00
5330 Edgewood Lane Parking Lot Electricity	81.00	300.00	26.95%	219.00
5340 Summit Gas, Water & Sewer	227.00	1,700.00	13.38%	1,473.00
5350 Summit House Electricity	16.00	3,000.00	0.54%	2,984.00
5360 Telephone & Internet	803.00	3,600.00	22.31%	2,797.00
5370 Trash and Recycling	394.00	1,500.00	26.26%	1,106.00
5380 Stormwater Assessment Fee		1,100.00	0.00%	1,100.00
Total for 5300 Utilities	\$3,852.00	\$22,200.00	17.35%	\$18,348.00
5550 Buildings and Grounds				
5551 Main Building Maintenance Expenses	498.00	3,000.00	16.60%	2,502.00
5552 Buildings Contractual Maintenance	5,636.00	12,270.00	45.94%	6,634.00
5554 Summit House Maintenance Expenses	70.00	1,500.00	4.67%	1,430.00

5556 Grounds Contractual Services	920.00	7,000.00	13.14%	6,080.00
5559 Gardens and Grounds Expenses	353.00	2,000.00	17.66%	1,647.00
5562 Facility Improvement Projects	782.00	5,500.00	14.22%	4,718.00
5553 Bristol Fund Expense (B&G)		3,259.00	0.00%	3,259.00
5560 Buildings & Grounds Reserve Expense		3,000.00	0.00%	3,000.00
5563 Furniture & Equipment		750.00	0.00%	750.00
Total for 5550 Buildings and Grounds	\$8,260.00	\$38,279.00	21.58%	\$30,019.00
5600 Personnel Expenses				
5610 Payroll - Benefits				
5611 Dental Insurance	819.00	1,758.00	46.59%	939.00
5612 Health Insurance	11,498.00	30,467.00	37.74%	18,969.00
5613 Life Insurance	560.00	2,154.00	26.00%	1,594.00
5614 Long Term Disability	874.00	3,752.00	23.29%	2,878.00
5615 Pension	7,787.00	24,225.00	32.14%	16,438.00
Total for 5610 Payroll - Benefits	\$21,538.00	\$62,356.00	34.54%	\$40,818.00
5620 Wages & Payroll Tax				
5621 Wages	72,452.00	257,138.00	28.18%	184,686.00
5622 Payroll Taxes	4,207.00	15,989.00	26.31%	11,782.00
5623 Payroll - Payment In Lieu of FICA	1,983.00	7,365.00	26.92%	5,382.00
5624 Minister Housing Allowance	12,959.00	48,133.00	26.92%	35,174.00
Total for 5620 Wages & Payroll Tax	\$91,601.00	\$328,625.00	27.87%	\$237,024.00
5630 Professional Development Expenses				
5631 Lead Minister Prof Expenses	1,682.00	3,000.00	56.05%	1,318.00
5632 Minister of Faith Development Prof Expenses	1,335.00	6,000.00	22.25%	4,665.00
5634 Dir of Music Prof Expenses	367.00	750.00	48.88%	383.00
5633 Operations Manager Professional Expenses		1,250.00	0.00%	1,250.00
Total for 5630 Professional Development Expenses	\$3,383.00	\$11,000.00	30.76%	\$7,617.00
5640 Payroll Processing Fees	1,229.00	5,900.00	20.83%	4,671.00
5650 Workers' Compensation Insurance	226.00	1,500.00	15.08%	1,274.00
5670 Sabbatical Reserve Expense	500.00	500.00	100.00%	0.00
Total for 5600 Personnel Expenses	\$118,477.00	\$409,881.00	28.91%	\$291,404.00
5700 Financial Services Charges				
5710 Bank Fees	5.00	150.00	3.40%	145.00
5720 Financial Service Fees	1,042.00	4,000.00	26.06%	2,958.00
5730 Credit Card Fees		50.00	0.00%	50.00
Total for 5700 Financial Services Charges	\$1,048.00	\$4,200.00	24.94%	\$3,153.00
5070 Personnel Committee		400.00	0.00%	400.00
5400 Legal & Professional Fees				

5410 Accounting Fees		3,000.00	0.00%	3,000.00
5420 Legal Expense		500.00	0.00%	500.00
Total for 5400 Legal & Professional Fees		\$3,500.00	0.00%	\$3,500.00
5800 Debt Service				
5801 Payment on 2019 Unsecured Loan		5,000.00	0.00%	5,000.00
5802 CEF Bonds int Expense		5,775.00	0.00%	5,775.00
Total for 5800 Debt Service		\$10,775.00	0.00%	\$10,775.00
5900 General Operating Reserve (Contingency)		6,000.00	0.00%	6,000.00
Total for 5000 Administrative Expenses	\$142,839.00	\$555,435.00	25.72%	\$412,596.00
6000 Program Expenses				
6020 UUA Annual Program Fund	5,000.00	5,000.00	100.00%	0.00
6100 Worship Expenses				
6110 Worship Supplies and Subscriptions	172.00	400.00	43.02%	228.00
6120 Guest Preacher	940.00	750.00	125.33%	-190.00
Total for 6100 Worship Expenses	\$1,112.00	\$1,150.00	96.70%	\$38.00
6130 Music Expense	404.00	250.00	161.54%	-154.00
6140 Pianist	760.00	3,600.00	21.11%	2,840.00
6150 Abrahamse Fund (Music) Expense	360.00	774.00	46.51%	414.00
6160 Instrument service		1,050.00	0.00%	1,050.00
Total for 6130 Music Expense	\$1,524.00	\$5,674.00	26.86%	\$4,150.00
6200 Faith Development				
6220 RE Children & Youth	1,375.00	6,000.00	22.92%	4,625.00
6210 Cheetham Fund Expense (RE)		826.00	0.00%	826.00
6230 Women's Spirit		100.00	0.00%	100.00
Total for 6200 Faith Development	\$1,375.00	\$6,926.00	19.86%	\$5,551.00
6300 Beloved Community				
6320 Childcare	461.00	3,250.00	14.19%	2,789.00
6330 Family Ministry	185.00	750.00	24.67%	565.00
6310 Caring Community		75.00	0.00%	75.00
6340 Fun & Friendship		500.00	0.00%	500.00
6350 Inclusivity Ministry		500.00	0.00%	500.00
6360 Membership & Member Tracking		500.00	0.00%	500.00
6370 Volunteer Coordination		100.00	0.00%	100.00
6380 Young Adults / Campus Outreach		500.00	0.00%	500.00
6390 Campus Plan		3,000.00	0.00%	3,000.00
Total for 6300 Beloved Community	\$646.00	\$9,175.00	7.04%	\$8,529.00
6400 Faith Witness - External				
6420 Interfaith Ministries	258.00	400.00	64.38%	143.00
6440 Justice Ministries	791.00	1,000.00	79.07%	209.00

6410 Community Partnerships (Social Action Council)		1,500.00	0.00%	1,500.00
6430 Ministry for Earth		500.00	0.00%	500.00
Total for 6400 Faith Witness - External	\$1,048.00	\$3,400.00	30.83%	\$2,352.00
Total for 6000 Program Expenses	\$10,705.00	\$31,325.00	34.18%	\$20,619.00
6500 Program Expense (Disbursal of Restricted Funds)	29,663.00			-29,663.00
7000 Fund Raising Expense				
7200 Other Fundraising Expense	826.00	900.00	91.76%	74.00
7100 Pledge Program Expense		300.00	0.00%	300.00
Total for 7000 Fund Raising Expense	\$826.00	\$1,200.00	68.82%	\$374.00
Total for Expenses	\$184,034.00	\$587,960.00	31.30%	\$403,926.00
Net Operating Income	\$57,926.00	\$1,475.00	3,927.19%	-\$56,451.00
Other Income				
4700 Unrealized Gain/Loss - UUCEF	15,563.00			-15,563.00
Total for Other Income	\$15,563.00			-\$15,563.00
Other Expenses				
5990 Endowment Fees	930.00			-930.00
Total for Other Expenses	\$930.00			-\$930.00
Net Other Income	\$14,633.00			-\$14,633.00
Net Income	\$72,559.00	\$1,475.00	4,919.24%	-\$71,084.00
Accrual Basis Friday, October 17, 2025 01:06 AM GMTZ				