

Unitarian Universalist Congregation of Charlottesville
BOARD OF TRUSTEES Board Minutes
March 17, 2026

Meeting held in person at Unitarian Universalist Social Hall 6:30pm

In attendance: Carol Gardner, Acshah Carrier, Jimmy Gorham, Bev Ryan, Leia Durland-Jones, Ellie Syverud, John Griffith, Kim Grover, Ashley Cooley, Tim Temerson

Absent: N/A

Guests:N/A

I. Opening - (20 mins)

- Opening and Closing Words: Tammy Wilt
- Reporter: Bev Ryan
- Time Keeper: Jimmy Gorham
- Process Observer: John Griffith

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

MOTION: to Accept the agenda - John Griffith moved to accept and Bev Ryan seconded and all approved.

5. Written Correspondence - N/A

II. Electronic Motions (1 minute)

1. Approval of the February minutes - approved via email after the meeting since not everyone had a chance to review due to the short time between meetings.

III. Business (35 min)

- Building and Grounds Task Force (5min) Carol Gardner - Request to appoint Elizabeth Breeden and Valentine Portz to the Buildings and Grounds Task Force. Tammy Wilt moved to approve and Ellie Syverud seconded and all approved.
- Public Witness Policy Process (15min) Carol Gardner - please review the [UU policy manual](#) pg 64-66 prior to the meeting. The Clergy Collective Letter is posted [here](#). The Public Witness Policy Process was brought up as Mosaic reached out to the board to be able to sign as a group within UUCville. The board did affirm that Mosaic has the ability to sign as a group. A suggestion was made to create a group to review the Public Witness Policy with input from the congregation. Carol Gardner to write a newsletter item looking for people to serve on a task force

- Budget Process Timeline (15min) - Jimmy Gorham - The budget needs to be sent to the congregation prior to the congregational meeting the 1st Sunday in June. The budget needs to be vetted and come before the board prior to the congregational meeting. The pledge drive ends on March 31, 2026. The budget then goes through the finance committee then gets presented to the board. The initial budget to be presented to the board at the April 28th meeting and finalized by the May 26th board meeting. This timeline is a bit fluid.

BREAK AND GRATITUDE CARDS (5 min) - Please think of people the Board should recognize for their recent contributions to our church community. Bev Gorham (Tammy Wilt) painting and Sin Barreras. Meg Dunham (Ellie Syverud) and Roz Westerman (John Griffith) for Sin Barreras lead teachers to share with the team.

IV. Reports (20 min) - Written reports can be found at the end of the minutes. *Votes mentioned in reports will be taken in the business portion of the meeting.*

1. **President's Report** (Oral)- Carol Gardner - Acknowledged the yard sale and auction to raise additional funds for the budget. The member survey is now live and has been texted out and it is posted on the website. Rev Tim is going to help organize a tabling session for the member survey after church. Carol spoke with Kay with Building and Grounds and the Building and Grounds Task Force decided not to proceed with a survey. Kay to come back to the board with another update in June, 2026
2. **Vice President's Report** (Written) - Beverly Ryan
3. **Treasurer's Report** (Written) - Jimmy Gorham
4. **Lead Minister's Report** - (Oral) - Rev. Tim Temerson - He attended the Charlottesville Clergy Collective letter press conference. Tim Temerson and Meg Dunham attended a Know Your Rights training at Visible Records. The training was done in Spanish with translation available. He officiated the ceremony for John Pfaltz, his widow, Margaret Pfaltz made a donation. The Palestine/Israel group to be reinstated to discuss organizations to donate. Rev Tim is doing a pulpit exchange. Six new members joined the church.
5. **Minister of Faith Development's Report** (Oral) - Rev Leia Durland-Jones - There is some pain with the transfer of systems in the office. She is going through Sync to see what needs to be archived and what gets transferred to the new system. Bryn has been accepted to graduate school and we now need to find a new RE assistant effective the last week of May, 2026. Rev Leia was nominated to be on a mentoring committee to

mentor faith leaders going through the program and it is a 3yr time commitment. Handouts were given out regarding the new Spring Adult Faith Development Offerings.

6. **Membership Report** (Oral) - 337 members - Rev Tim Temerson, March 17,2026

7. **Board Liaison Reports**

- Nom Committee: (Oral) John Griffith - There are a slate of nominees for all positions.
 - 2yr nominating committee - Jed Devine
 - 2 - 3yr terms - Susan Erno, Sharon Baiocco
 - 2yr term Secretary - Tammy Wilt
 - 2yr Vice President - John Griffith
 - Board at Large - Meg Dunham and Coretta Powers
 - Affirm Ashley Cooley as Board At Large member
- Personnel Committee (Oral) - Beverly Ryan - N/A
- Communications Committee (Oral) - Achsah Carrier - N/A
- Building Committee (Oral) - Kim Grover - working with finance for the budget and prioritizing repairs.
- Stewardship Steering Committee (Oral) Ellie Syverud - met last week and working on a new member packet, discussed pledge drive and thinking ahead to the Capital Campaign. Kay to send out materials
- Mosaic Squad: (Oral) Ashley Cooley - met last week, prioritizing No Kings meeting on March 28th, Signal app training took place. They are meeting with congregate Charlottesville 4/26 to see how we may be able to help. Long term goals are to expand membership.

V. Review Agenda Items for Next Meeting (5 min) N/A

VI. Closing Activities (5 min)

1. Process Review – process went well
2. Things to do / communicate - Thank Jude and Angela for pledge drive in April
3. Closing Words

Dates to remember

Next UU Charlottesville Executive Board Meeting: April 15, 2026

Next UU Charlottesville Board Meeting: April 28, 2026

President's Reports to the Board - Presented orally

Submitted by: Carol Gardner, President

Vice President's Report to the Board:

Vice President's Report to the Board
March 2026

Fundraising Events:

The Spring Auction is scheduled for May 9th, from 5-7 pm. Donations are being solicited, with a deadline of April 19th.

The Connie Cheetham Award Committee has posted a notice for nominations. We will be presenting the award at the May 3rd service. The deadline for nominations is April 18th.

Annual Reports: A notice will be sent out to committee chairs in early April, and the report will be completed by May 15th for posting on the Web and included in the Congregational meeting in June 2025.

Respectfully,
Bev Ryan

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

Treasurer's Report to the Board:

[Treasurer's report, March 2026](#)

Greetings to the Board and to the Congregation

This report will be brief.

- **FC Minutes:** The Finance Committee meeting met on March 10, but I do not have those minutes as of this writing.
- **Budget Preparation:** The budget preparation continues apace. We continue to add to the draft. I have recommended numbers from the Personnel Committee, which have been incorporated.
- **Distribution of moneys** within our back accounts: We want to balance maximizing interest earned with liquidity. The Chair of Finance (Donna Redmond), Sandra, and I have agreed that we will endeavor to keep two months' worth of expenses (~\$100K) in the checking account, a small amount in savings (~\$10K) and the remainder (currently ~\$100K) in the Money Market account (highest interest rate).
- **UUA Common Endowment Fund:** The value of our investments as of Feb. 28 was over \$800,000 but the very recent market volatility due to the Iran war serves as a reminder that valuations can change quickly; that valuation is no doubt lower as of this writing.

- **ABC Trusts/Funds and Bonds:** I continue to delve into all of this. At the Executive Committee meeting on March 4, the consensus was to wait to present findings on this until after Pledge Drive, and after the Congregational Meeting. I intend to submit a report for discussion in late summer / early fall of 2026.

As usual, see two separate pdf 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. As a reminder, to make it easier to interpret, I have removed the parts on "Fixed Assets" and "the Bonds and Trusts" as those do not change from month to month. I do include our long-term liabilities, to keep us aware of them.

Thank you, Jimmy G, UUCville Treasurer.

Submitted by: **Jimmy Gorham**, Treasurer

Lead Minister's Report to the Board: Presented orally

Rev. Tim, Lead Minister

Minister of Faith Development's Report: Rev Leia Durland Jones - Presented orally

Bank Accounts			
1010 General Fund	\$38,247	Total for Checking	\$127,339
1020 Donor Restricted Funds	\$31,334		
1030 Board Designated Funds	\$57,758		
1100 Money Market	\$100,468	Total for Money Market, Savings, CD	\$126,451
1200 UVA CCU Savings (00)	\$25,983		
Total for Bank Accounts			\$253,790

1500 UU Common Endowment Fund		\$815,203
TOTAL		\$1,068,994

1020 Restricted Funds	
1020-01 Adult Faith Development AFD	7,064
1020-02 Children's Service Offering	760
1020-03 Cluster Conference RJ Funds	153
1020-04 Coming of Age	2,590
1020-05 Food Pantry	7,134
1020-06 Green Building Improvements	1,036
1020-07 IHS Meal Packets	1,816
1020-08 Labyrinth Project	713
1020-09 Minister's Discretionary Fund	9,755
1020-10 Music Programs	214
1020-11 Refugee Collection	0
1020-14 Special Collection	100
TOTAL Donor Restricted Funds	31,334

1030 Board Designated Funds

1030-01 Building & Grounds Reserve Fund	\$18,547		
1030-02 Capital Reserve Fund	\$983		
1030-03 Operating Reserve	\$21,708		
1030-05 Sabbatical Fund	\$2,953		
1030-06 Remembrance Garden	\$13,567		
TOTAL Board Designated Funds	\$57,758		
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		

Unitarian Universalist Congregation of Charlottesville

Budget vs. Actuals: July 2025 - February 2026 (66.7%)

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
Revenue				
4000 Non-Profit Revenue FY25-26				
4100 Pledged Donations FY 2025-26				
4110 Current Year Pledges FY 2025-26	345,157	488,250	143,093	71.00 %
4120 Current Year Pledge Match FY 2025-26	10,439	12,060	1,621	87.00 %
4130 Prior Year Pledges FY 2024-25	8,492	3,000	-5,492	283.00 %
Total 4100 Pledged Donations FY 2025-26	364,088	503,310	139,222	72.00 %
4200 Non-Pledged Donations FY 2025-26				
4210 Current Year Unpledged Donations FY 2025-26	9,107	7,000	-2,107	130.00 %
4220 Offering / Plate Cash FY 2025-26	5,452	10,000	4,548	55.00 %
Total 4200 Non-Pledged Donations FY 2025-26	14,560	17,000	2,440	86.00 %
4400 Fundraising Events				
4410 Spring Auction	430	6,000	5,570	7.00 %
4420 Fall Auction	8,327	6,500	-1,827	128.00 %
4430 Yard Sale	15,970	7,500	-8,470	213.00 %
4450 Other Fundraising Revenue	275	2,000	1,725	14.00 %
4455 RaiseRight, Scrip, Kroger Revenue	605	1,000	395	60.00 %
4460 Hospitality Contributions	83	250	167	33.00 %
Total 4450 Other Fundraising Revenue	963	3,250	2,287	30.00 %
Total 4400 Fundraising Events	25,690	23,250	-2,440	110.00 %
Total 4000 Non-Profit Revenue FY25-26	404,338	543,560	139,222	74.00 %
4500 Other Revenue				
4510 Building Use Fees	12,317	22,500	10,183	55.00 %
4520 Bank Interest	981	800	-181	123.00 %
4530 Endowment Withdrawal for Operating Income		11,800	11,800	
4580 Transfer from Operating Reserve		5,000	5,000	
4610 CEF Bond Income		908	908	
4620 Cheatham Fund (RE)		826	826	
4630 Abrahamse Fund (Music)		774	774	
4640 Bristol Fund (B & G)		3,259	3,259	
Total 4500 Other Revenue	13,299	45,867	32,568	29.00 %
Total Revenue	\$417,636	\$589,427	\$171,791	71.00 %
GROSS PROFIT	\$417,636	\$589,427	\$171,791	71.00 %
Expenditures				
5000 Administrative Expenses				
5010 Communications	1,137	3,000	1,863	38.00 %
5020 Multi-Peril Insurance	7,368	15,000	7,632	49.00 %
5060 Hospitality	1,682	2,500	818	67.00 %
5070 Personnel Committee		400	400	
5090 Safety and Security	473	500	27	95.00 %
5100 Cleaning & Supplies				
5110 Cleaning Service	11,100	21,000	9,900	53.00 %

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
5120 Kitchen, Bathroom & Cleaning Supplies	1,196	2,000	804	60.00 %
Total 5100 Cleaning & Supplies	12,296	23,000	10,704	53.00 %
5200 Office Expense and Supplies				
5210 Office Supplies	1,177	2,000	823	59.00 %
5220 Online Subscription Fees	1,903	5,500	3,597	35.00 %
5230 Photocopies and Printing	1,631	2,100	469	78.00 %
5240 Postage	308	1,100	792	28.00 %
5250 IT Support	3,698	3,500	-198	106.00 %
5260 Computer Maintenance/Upgrade	713	2,000	1,287	36.00 %
Total 5200 Office Expense and Supplies	9,429	16,200	6,771	58.00 %
5300 Utilities				
5310 717 Main Bldg Electricity	5,465	7,000	1,535	78.00 %
5320 Summit House Electricity	1,435	3,000	1,565	48.00 %
5330 Edgewood Lane Parking Lot Electricity	249	300	51	83.00 %
5340 717 Main Bldg Gas, Water, & Sewer	2,328	4,000	1,672	58.00 %
5350 Summit Gas, Water & Sewer	691	1,700	1,009	41.00 %
5360 Telephone & Internet	2,312	3,600	1,288	64.00 %
5370 Trash and Recycling	1,090	1,500	410	73.00 %
5380 Stormwater Assessment Fee	497	1,100	603	45.00 %
Total 5300 Utilities	14,066	22,200	8,134	63.00 %
5400 Legal & Professional Fees				
5410 Accounting Fees		3,000	3,000	
5420 Legal Expense	49	500	451	10.00 %
Total 5400 Legal & Professional Fees	49	3,500	3,451	1.00 %
5550 Buildings and Grounds				
5551 Main Building Maintenance Expenses	2,311	3,000	689	77.00 %
5552 Buildings Contractual Maintenance	7,648	12,270	4,622	62.00 %
5553 Bristol Fund Expense (B&G)	658	3,259	2,601	20.00 %
5554 Summit House Maintenance Expenses	548	1,500	952	37.00 %
5556 Grounds Contractual Services	4,660	7,000	2,340	67.00 %
5559 Gardens and Grounds Expenses	1,261	2,000	739	63.00 %
5560 Buildings & Grounds Reserve Expense	3,000	3,000	0	100.00 %
5562 Facility Improvement Projects	4,419	5,500	1,081	80.00 %
5563 Furniture & Equipment		750	750	
Total 5550 Buildings and Grounds	24,505	38,279	13,774	64.00 %
5600 Personnel Expenses				
5610 Payroll - Benefits				
5611 Dental Insurance	1,567	1,758	191	89.00 %
5612 Health Insurance	22,360	30,467	8,107	73.00 %
5613 Life Insurance	1,120	2,154	1,034	52.00 %
5614 Long Term Disability	1,748	3,752	2,004	47.00 %
5615 Pension	16,235	24,225	7,990	67.00 %
Total 5610 Payroll - Benefits	43,030	62,356	19,326	69.00 %
5620 Wages & Payroll Tax				
5621 Wages	182,940	257,138	74,198	71.00 %
5622 Payroll Taxes	10,422	15,989	5,567	65.00 %
5623 Payroll - Payment In Lieu of FICA	5,297	7,365	2,068	72.00 %
5624 Minister Housing Allowance	34,317	48,133	13,816	71.00 %

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
Total 5620 Wages & Payroll Tax	232,976	328,625	95,649	71.00 %
5630 Professional Development Expenses				
5631 Lead Minister Prof Expenses	1,084	3,000	1,916	36.00 %
5632 Minister of Faith Development Prof Expenses	2,934	6,000	3,066	49.00 %
5633 Operations Manager Professional Expenses	206	1,250	1,044	16.00 %
5634 Dir of Music Prof Expenses	367	750	383	49.00 %
Total 5630 Professional Development Expenses	4,590	11,000	6,410	42.00 %
5640 Payroll Processing Fees	3,584	5,900	2,316	61.00 %
5650 Workers' Compensation Insurance	453	1,500	1,048	30.00 %
5670 Sabbatical Reserve Expense	500	500	0	100.00 %
Total 5600 Personnel Expenses	285,132	409,881	124,749	70.00 %
5700 Financial Services Charges				
5710 Bank Fees	13	150	137	9.00 %
5720 Financial Service Fees	3,006	4,000	994	75.00 %
5730 Credit Card Fees		50	50	
Total 5700 Financial Services Charges	3,019	4,200	1,181	72.00 %
5800 Debt Service				
5801 Payment on 2019 Unsecured Loan	5,000	5,000	0	100.00 %
5802 CEF Bonds Interest Expense		5,775	5,775	
Total 5800 Debt Service	5,000	10,775	5,775	46.00 %
5900 General Operating Reserve (Contingency)	6,000	6,000	0	100.00 %
Total 5000 Administrative Expenses	370,158	555,435	185,277	67.00 %
6000 Program Expenses				
6020 UUA Annual Program Fund	5,000	5,000	0	100.00 %
6100 Worship Expenses				
6110 Worship Supplies and Subscriptions	190	400	210	48.00 %
6120 Guest Preacher	1,865	750	-1,115	249.00 %
Total 6100 Worship Expenses	2,055	1,150	-905	179.00 %
6130 Music Expense				
6140 Pianist	1,985	3,600	1,615	55.00 %
6150 Abrahamse Fund (Music) Expense	714	774	60	92.00 %
6160 Instrument service	210	1,050	840	20.00 %
6170 Music Supplies	250	250	0	100.00 %
Total 6130 Music Expense	3,159	5,674	2,515	56.00 %
6200 Faith Development				
6210 Cheetham Fund Expense (RE)	800	826	26	97.00 %
6220 RE Children & Youth	3,177	6,000	2,823	53.00 %
6230 Women's Spirit		100	100	
Total 6200 Faith Development	3,977	6,826	2,949	57.00 %
6300 Beloved Community				
6310 Caring Community		75	75	
6320 Childcare	1,043	3,250	2,208	32.00 %
6330 Family Ministry	185	750	565	25.00 %
6340 Fun & Friendship		500	500	
6350 Inclusivity Ministry		500	500	
6360 Membership & Member Tracking	155	500	345	31.00 %
6370 Volunteer Coordination		100	100	
6380 Young Adults / Campus Outreach	152	500	348	30.00 %

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
6390 Campus Plan		3,000	3,000	
Total 6300 Beloved Community	1,534	9,175	7,641	17.00 %
6400 Faith Witness - External				
6410 Community Partnerships (Social Action Council)	364	1,500	1,136	24.00 %
6420 Interfaith Ministries	408	400	-8	102.00 %
6430 Ministry for Earth		500	500	
6440 Justice Ministries	791	1,000	209	79.00 %
Total 6400 Faith Witness - External	1,562	3,400	1,838	46.00 %
Total 6000 Program Expenses	17,287	31,325	14,038	55.00 %
7000 Fund Raising Expense				
7100 Pledge Program Expense		300	300	
7200 Other Fundraising Expense	888	900	12	99.00 %
Total 7000 Fund Raising Expense	888	1,200	312	74.00 %
Total Expenditures	\$388,333	\$587,960	\$199,627	66.00 %
NET OPERATING REVENUE	\$29,304	\$1,467	\$ -27,837	1,998.00 %
NET REVENUE	\$29,304	\$1,467	\$ -27,837	1,998.00 %

Statement of Financial Position

Unitarian Universalist Congregation of Charlottesville
As of February 28, 2026

Distribution account	Total
Assets	
Current Assets	
Bank Accounts	
1000 UVA CCU Checking (80)	\$0
1010 General Fund	36,198
1020 Donor Restricted Funds	
1020-01 Adult Faith Development AFD	6,867
1020-02 Children's Service Offering	760
1020-03 Cluster Conference RJ Funds	153
1020-04 Coming of Age	2,590
1020-05 Food Pantry	10,031
1020-06 Green Building Improvements	1,036
1020-07 IHS Meal Packets	1,816
1020-08 Labyrinth Project	713
1020-09 Minister's Discretionary Fund	9,255
1020-10 Music Programs	214
1020-11 Refugee Collection	0
1020-14 Special Collection	100
Total for 1020 Donor Restricted Funds	\$33,535
1030 Board Designated Funds	
1030-01 Building & Grounds Reserve Fund	18,483
1030-02 Capital Reserve Fund	983
1030-03 Operating Reserve	21,621
1030-05 Sabbatical Fund	2,953
1030-06 Remembrance Garden	13,567
Total for 1030 Board Designated Funds	\$57,607
Total for 1000 UVA CCU Checking (80)	\$127,339
1100 Money Market	100,468
1200 UVA CCU Savings (00)	25,983

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Accrual Basis Thursday, March 05, 2026 03:31 PM GMT-05:00

Statement of Financial Position

Unitarian Universalist Congregation of Charlottesville
As of February 28, 2026

Distribution account	Total
Total for Bank Accounts	\$253,791
Other Current Assets	
1500 UU Common Endowment Fund	815,203
1600 Member Bonds	
1610 Bonds Held by Restricted Funds	
1611 Cheetham Bonds Principal (RE)	16,214
1612 Bristol Bonds Principal	62,077
1613 Abrahamse Bonds Principal	15,642

Statement of Financial Position

Unitarian Universalist Congregation of Charlottesville
As of February 28, 2026

	Total
Distribution account	
Total for 1610 Bonds Held by Restricted Funds	\$93,933
1620 CEF Bonds Principal	16,067
Total for 1600 Member Bonds	\$110,000
Total for Other Current Assets	\$925,203
Total for Current Assets	\$1,178,994
Fixed Assets	
1700 Church Building	830,529
1710 Church Addition	572,114
1720 Church Land	55,000
1730 Summit House Building	475,148
1740 Summit House Land	150,000
1800 Furniture & Fixtures	513
Total for Fixed Assets	\$2,083,304
Total for Assets	\$3,262,298
Liabilities and Equity	
Liabilities	
Current Liabilities	
Credit Cards	
2030 Ramp Card	1,253
Total for Credit Cards	\$1,253
Other Current Liabilities	
2060 Health Premium WH	3,193
2070 Dental Premium WH	176
2100 Other Liabilities Total	
2120 Public Radio Fund	80
2130 Social Action Collections (SAC)	2,772
2137 Future Year Pledges	5,200
Total for 2100 Other Liabilities Total	\$8,052

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Accrual Basis Thursday, March 05, 2026 03:31 PM GMT-05:00

Statement of Financial Position

Unitarian Universalist Congregation of Charlottesville
As of February 28, 2026

Distribution account	Total
2400 Reserve Projects	
2401 Buildings and Grounds Projects	
2401-2024-00 Summit House Porch Project	440
Total for 2401 Buildings and Grounds Projects	\$440
Total for 2400 Reserve Projects	\$440
Total for Other Current Liabilities	\$11,861
Total for Current Liabilities	\$13,114

Statement of Financial Position

Unitarian Universalist Congregation of Charlottesville
As of February 28, 2026

	Total
Distribution account	
Long-term Liabilities	
2230 Long Term Liabilities	
2231 Summit House Bonds	110,000
2232 No Interest Member Loan	24,000
Total for 2230 Long Term Liabilities	\$134,000
Total for Long-term Liabilities	\$134,000
Total for Liabilities	\$147,114
Equity	
3000 Net Assets (Equity)	2,731,344
Retained Earnings	297,268
Net Income	86,572
Total for Equity	\$3,115,184
Total for Liabilities and Equity	\$3,262,298

