

**Board Meeting Minutes for July 18, 2017**  
**Unitarian Universalist Church of Chattanooga**

**Present:** Bart Solomon, President; Monique Lewis, Past President; Nicky Ozbek, President-elect; Mary Lou Reed, VP Religious Growth Ministry; Linda Park, VP Outreach Ministry; Link Christiansen, VP Congregational Life Ministry; Connie Cowherd, Secretary; Bill Derrickson, Treasurer; Rev. Cathy Harrington, Developmental Minister via Zoom teleconferencing.

**Absent:** David Benn, V.P. Resources Ministry

**Guests:** Wendy Weirick

Bart called the meeting to order at 6:30PM and lit the chalice.

Lynna Ruth Standridge shared the following quote from Amelia Earhart as our opening words, "The most difficult thing is the decision to act. The rest is merely tenacity. The fears are paper tigers. You (we) can do anything you (we) decide to do. You (we) can act to change and control your (our) life and the procedure. The process is its own reward."

Everyone shared about themselves and their church backgrounds.

**Minutes:** Bill Derrickson made a motion to accept the June Annual Membership minutes as submitted. Lynna Ruth Standridge seconded and the minutes were approved.

June's Board meeting minutes were not available.

**Developmental Minister's Report:** Cathy reports she will be returning from vacation on the 16<sup>th</sup> of August. Her first sermon will be on August 20<sup>th</sup>.

**Treasurer's Report:** Bill Derrickson – see attached report. Bill reviewed the 2016-2017 fiscal year Income/Expense Statement for the benefit of new Board members.

Uucc was acknowledged as a 'fair share church' for more than 10 years in UUA's G. I. F.T. program, i.e., Generously Investing For Tomorrow. This is UUA Southeast region's "annual program fund making transformation possible for all congregations. Amplifying the best of Unitarian Universalism." Uucc does this by giving 7% of their annual budget to G.I.F.T.

A motion was made by Bill Derrickson to transfer any surplus from this past year's budget into the ministerial search reserve. Linda Park seconded. A vote was conducted without abstentions or objections. The motion passed.

Bart recognized the professional work of our finance committee which allows the Board to focus on bigger projects.

**Religious Growth Report:** See attached report. Mary Lou reports that K – 12 is good. The new curriculum begins on August 20<sup>th</sup>. Tom Kunesh will lead Jane Goodall's

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class on conservation beginning Wednesday September 6<sup>th</sup> ,7PM until 9PM. The class will run through December.

**Outreach Report:** See attached report. Linda reports August 1<sup>st</sup> film, sponsored by Social Justice and Third Street Church of Christ, is about Ed Johnson's hanging on Walnut bridge. A large crowd is expected.

Membership committee is to be tasked with making a list of what they need Mandy (new administrator) to do in regards to membership.

**Congregational Life Report:** No report, Link says he is acclimating into the position.

**Resource Ministry:** No official report. Bart read an email from David Benn which states his committees are at work. There has been discussion about capital improvements/repairs to the Church. He is working with Bill Derrickson to prioritize a repair list obtained from Paul. In the process of getting estimates. Item #1 is a proposal to install a chair lift or elevator for disabled members; we have a donation to help with half the cost.

**New Business:**

1. **Dates of Board Meetings/Retreat.** The Board agreed to continue meeting on the third Tuesday of each month. **HOWEVER**, our next board meeting will be Tuesday August 22<sup>nd</sup> so that Cathy can join us. All in attendance agreed to this date.

The Board's retreat will be Friday September 8<sup>th</sup> beginning at 6PM and Saturday September 9<sup>th</sup> 8:30AM until 4PM. More details to follow. **MARK YOUR CALENDAR.**

2. **Disruptive Persons Policy.** Wendy Weirick, representing the Transition Team, presents a new policy for adoption by the Board, the Disruptive Persons Policy. The policy, attached, strives to have 'right' relationships within our community. Connie Cowherd moves that we accept this policy as written. Nikki Ozbek seconds. The motion was accepted.

A discussion followed about publicizing new policies. It was agreed that new policies would be published in the newsletter and presented to members following a service. Also, a Board member(s) should be available after the service to discuss with member(s), if needed.

Linda reported that work is being done on an emergency preparedness plan/policy.

3. **WOWzers Scope of Responsibility.** Cathy's contract states that the minister and worship committee are responsible for the Sunday Services (see attached). Both

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UUC's current description for "Sunday Services/WOWzers purpose and responsibilities 2014" and a copy of Nashville's UU Worship Team Policy were provided to Board Members. Cathy recommends the current description be reviewed by the Board. Her concern is that the Worship Associates are not addressed in current description nor are they provided a budget.

Bart established an Ad Hoc Committee consisting of Cathy, Nikki, and Link (possibly another appointed by Cathy) to review and discuss this issue then report back to the Board in September.

4. **Approval of new Benevolence Fund Policy and Application Form.** Bill Derrickson submitted the attached policy and application for the Board's approval. The minister will be responsible for giving the form to individual asking for help. Link made a motion to adopt the policy and form as submitted. Mary Lou seconded. A vote was conducted without abstentions or objections. The motion was passed.
5. **Building Use:** WE Church /Adult RE. Discussion took place regarding the use of rental space. When a conflict arises it is "normally the VP of Resources who would handle the conflict."

**Old Business:** Oak Ridge Proposal remains to be tabled.

**Quick Report Items:** Next Board meeting is the 4<sup>th</sup> Tuesday on August 22<sup>nd</sup>.

**Process Report:** Linda Park shared her observation of Board staying on agenda and accomplishing everything President Bart had intended to accomplish during this meeting.

**Closing Words:** Lynna Ruth Standridge read our closing words by Amelia Earhart, "Never interrupt someone doing something right."

The meeting was adjourned at 8:30 pm.

## Unitarian Universalist Church of Chattanooga

## Balance Sheet

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		Current Year	Previous Year
ASSETS	1000		
BANK ACCOUNTS AND CASH	1050		
First Volunteer Checking	1110	\$27,504.59	\$367.46
First Volunteer Money Mkt	1210	41,924.70	41,697.52
Subtotal Bank Accounts And Cash	1050	69,429.29	42,064.98
INVESTMENTS	1300		
CD 55291 md 9/19/17	1310	5,809.04	5,796.17
CD 55292 md 09/19/17	1320	5,844.20	5,831.25
CD 56157 md 06/21/17	1330	5,785.38	5,772.56
CD 56159 md 06/21/17	1340	5,785.38	5,772.56
CD 53276 md 09/05/17	1350	20,406.48	20,361.27
Subtotal Investments	1300	43,630.48	43,533.81
DUNCAN ENDOWMENT	1375		
Duncan CD's	1376	15,000.00	0.00
TOTAL ASSETS		\$128,059.77	\$85,598.79
LIABILITIES	2000		
CURRENT LIABILITIES	2010		
TAXES PAYABLE	2205		
OTHER DEDUCTIONS	2250		
Health Insurance Withheld	2270	\$390.69	\$78.33
PASS THRU CONTRIBUTIONS	2300		
GA Expense Acct	2306		
Poinsettias	2308	47.00	47.00
RE-OWL	2309-002	24.45	0.00
Share the Plate	2320	0.00	340.87
Healing Memories Grant	2335	11,117.00	0.00
Very Temporary	2350	130.43	0.00
Subtotal Pass Thru Contributions	2300	11,318.88	387.87
OTHER CURRENT LIABILITIES	2400		
Building Use Deposits	2410	50.00	50.00
Prepaid Pledges Next FY	2415	7,208.00	5,295.00
Challenge Grant Next FY	2416	250.00	0.00
WUTC	2520-001	1,709.80	2,882.80
Subtotal Other Current Liabilities	2400	9,217.80	8,227.80
Subtotal Current Liabilities	2010	20,927.37	8,694.00

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		Current Year	Previous Year
TOTAL LIABILITIES		20,927.37	8,694.00
NET ASSETS	3000		
UNRESTRICTED	3100		
Unrestricted Net Assets	3110	\$28,762.26	\$20,747.61
TEMPORARILY RESTRICTED	3201		
AV EQUIP & SECURITY	3209	0.00	-380.71
Building Reserve Fund	3210-102	16,913.78	16,913.78
Church of God Rent	3218-001	36,000.00	24,000.00
Endowment Holding	3220-104	130.13	130.13
Energy Efficiency	3221-103	1,804.67	1,804.67
Equipment Reserve Fund	3222-102	3,042.95	3,054.29
Flower Fund	3230-106	8.00	8.00
Landscaping Reserve	3236-002	50.14	260.07
Growth Initiatives	3238-009	0.00	5,552.04
Min. Search/Sabbatical	3245-109	1,544.55	1,544.55
Music Enhancement Fund	3250-110	1,374.54	1,374.54
Passover Seder	3255-111	527.25	326.71
REfurbish	3268	0.00	312.81
Restricted Lewis Prop Tax	3271-120	0.00	6.72
Social Justice	3279-003	720.76	220.76
YRE Fundraisers	3290-118	668.32	668.32
Teen Fundraising	3293-119	360.50	360.50
ALL FUNDRAISING	3631-399		
Fundraiser Auction	3631-413	195.55	0.00
Fundraiser Art Sales	3631-435	29.00	0.00
Subtotal All Fundraising	3631-399	224.55	0.00
Subtotal Temporarily Restricted	3201	63,370.14	56,157.18
PERMANENTLY RESTRICTED	3800		
Duncan CD's	3801	15,000.00	0.00
TOTAL FUND BALANCE		107,132.40	76,904.79
TOTAL LIABILITIES AND FUND BALANCE		\$128,059.77	\$85,598.79

## Unitarian Universalist Church of Chattanooga

## Income and Expense Statement

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		Current Period	Year to Date	YTD Prior Year	Year to Date Budget	YTD Budget Percentage	Annual Budget	Annual Budget Percentage
INCOME	4000							
UNRESTRICTED	4020							
Net Pledges - Current FY	4030	\$12,118.88	\$184,331.86	\$176,573.54	\$180,000.00	102.41%	\$180,000.00	102.41%
Pledges - Prior FY	4040	0.00	2,315.00	1,352.00	2,400.00	96.46%	2,400.00	96.46%
Challenge Grant Pledges	4045	888.00	888.00	0.00	0.00	0.00%	0.00	0.00%
Sunday Offertory	4050	325.01	5,313.12	5,465.46	5,600.00	94.88%	5,600.00	94.88%
Subtotal Unrestricted	4020	13,331.89	192,847.98	183,391.00	188,000.00	102.58%	188,000.00	102.58%
Budgeted		12,443.89	191,959.98	0.00	188,000.00	102.11%	188,000.00	102.11%
Non-Budgeted		888.00	888.00					
GIFT INCOME	4051							
Gifts	4051-400	0.00	1,571.65	141.84	1,550.00	101.40%	1,550.00	101.40%
Gifts In Memoriam	4051-410	0.00	100.00	0.00	100.00	100.00%	100.00	100.00%
Subtotal Gift Income	4051	0.00	1,671.65	141.84	1,650.00	101.31%	1,650.00	101.31%
Budgeted		0.00	1,671.65	0.00	1,650.00	101.31%	1,650.00	101.31%
Non-Budgeted		0.00						
INCOME ALL FUNDRAISERS	4100							
Fundraiser Income	4100-400	0.00	0.00	312.50	0.00	0.00%	0.00	0.00%
Income-Sage-ing Wkshp	4100-440	0.00	0.00	10.00	0.00	0.00%	0.00	0.00%
Subtotal Income All Fundraisers	4100	0.00	0.00	322.50	0.00	0.00%	0.00	0.00%
Budgeted		0.00	0.00	0.00	0.00	0.00%	0.00	0.00%
Non-Budgeted		0.00						
INTEREST INCOME	4500							
Banking Interest	4510	0.51	6.83	5.74	7.00	97.57%	7.00	97.57%
Savings Acct Interest	4512	5.17	62.70	65.85	62.00	101.13%	62.00	101.13%
Endowment CD Interest	4515	10.00	164.48	193.75	150.00	109.65%	150.00	109.65%
Regular CD Interest	4520	0.00	0.00	32.18	30.00	0.00%	30.00	0.00%
Subtotal Interest Income	4500	15.68	234.01	297.52	249.00	93.98%	249.00	93.98%
Budgeted		15.68	234.01	0.00	249.00	93.98%	249.00	93.98%
Non-Budgeted		0.00						
MISCELLANEOUS INCOME	4600							
Miscellaneous Income	4620	0.00	0.00	3.06	0.00	0.00%	0.00	0.00%
Photocopy Income	4621	5.00	15.25	15.95	12.00	127.08%	12.00	127.08%
Subtotal Miscellaneous Income	4600	5.00	15.25	19.01	12.00	127.08%	12.00	127.08%
Budgeted		5.00	15.25	0.00	12.00	127.08%	12.00	127.08%

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		Current Period	Year to Date	YTD Prior Year	Year to Date Budget	YTD Budget Percentage	Annual Budget	Annual Budget Percentage
<i>Non-Budgeted</i>		0.00						
RENTS AND LEASES	4700							
Cell Tower Income	4703-005	2,723.20	17,369.44	16,905.80	16,008.00	108.50%	16,008.00	108.50%
Bridge Club	4704	16.00	249.00	244.00	260.00	95.77%	260.00	95.77%
Chions	4707	0.00	151.00	174.00	100.00	151.00%	100.00	151.00%
Church of God	4708	0.00	0.00	9,000.00	25,000.00	0.00%	25,000.00	0.00%
12-Step Group	4709	25.00	200.00	0.00	200.00	100.00%	200.00	100.00%
Special Rentals	4711	0.00	785.50	825.00	800.00	98.19%	800.00	98.19%
WE Church	4712	250.00	575.00	0.00	300.00	191.67%	300.00	191.67%
Subtotal Rents And Leases	4700	3,014.20	19,329.94	27,148.80	42,668.00	45.30%	42,668.00	45.30%
<i>Budgeted</i>		3,014.20	19,329.94	0.00	42,668.00	45.30%	42,668.00	45.30%
<i>Non-Budgeted</i>		0.00						
TOTAL INCOME		16,366.77	214,098.83	211,320.67	232,579.00	92.05%	232,579.00	92.05%
<i>Budgeted</i>		15,478.77	213,210.83	0.00	232,579.00	91.67%	232,579.00	91.67%
<i>Non-Budgeted</i>		888.00	888.00					
EXPENSES	5000							
PERSONNEL EXPENSES	5010							
DIRECTOR OF MUSIC	5080							
Salary/Wages-DirMusic	5081-001	\$835.92	\$10,031.04	\$9,931.92	\$10,031.00	100.00%	\$10,031.00	100.00%
Employer Taxes-DirMus	5082-002							
FICA-DirMus	5083-002	51.82	637.23	615.84	638.00	99.88%	638.00	99.88%
Medicare-DirMus	5084-002	12.12	149.04	144.00	141.00	105.70%	141.00	105.70%
Subtotal Employer Taxes-dirmus	5082-002	63.94	786.27	759.84	779.00	100.93%	779.00	100.93%
<i>Budgeted</i>		63.94	786.27	0.00	779.00	100.93%	779.00	100.93%
<i>Non-Budgeted</i>		0.00						
Prof Expenses-DirMus	5088-008	0.00	0.00	0.00	150.00	0.00%	150.00	0.00%
Subtotal Director Of Music	5080	899.86	10,817.31	10,691.76	10,960.00	98.70%	10,960.00	98.70%
<i>Budgeted</i>		899.86	10,817.31	0.00	10,960.00	98.70%	10,960.00	98.70%
<i>Non-Budgeted</i>		0.00						
DIR RELIGIOUS EDUCATION	5090							
Salary/Wages-DRE	5091-001	2,025.84	24,310.08	24,069.12	24,308.00	100.01%	24,308.00	100.01%
Employer Taxes-DRE	5092-002							
FICA-DRE	5093-002	146.26	1,765.38	1,599.91	1,764.00	100.08%	1,764.00	100.08%

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Medicare-DRE	5094-002	34.20	412.84	374.09	412.00	100.20%	412.00	100.20%
Subtotal Employer Taxes-dre	5092-002	180.46	2,178.22	1,974.00	2,176.00	100.10%	2,176.00	100.10%
Budgeted		180.46	2,178.22	0.00	2,176.00	100.10%	2,176.00	100.10%
Non-Budgeted		0.00						
Supplemental wages-DRE	5095-005	333.34	3,916.69	3,000.00	4,000.00	97.92%	4,000.00	97.92%
PROF. EXPENSES--DRE	5098-008	0.00	454.00	459.74	400.00	113.50%	400.00	113.50%
Retirement DRE	5099	202.58	2,430.96	2,407.00	2,431.00	100.00%	2,431.00	100.00%
Subtotal Dir Religious Education	5090	2,742.22	33,289.95	31,909.86	33,315.00	99.92%	33,315.00	99.92%
Budgeted		2,742.22	33,289.95	0.00	33,315.00	99.92%	33,315.00	99.92%
Non-Budgeted		0.00						
ADMINISTRATOR	5150							
Salary/Wages-Admin	5151-001	1,769.68	21,236.16	21,025.92	21,236.00	100.00%	21,236.00	100.00%
Employer Taxes-Admin	5152-002							
FICA-Admin	5153-002	130.38	1,578.56	1,433.47	1,578.00	100.04%	1,578.00	100.04%
Medicare-Admin	5154-002	30.50	369.17	335.21	369.00	100.05%	369.00	100.05%
Subtotal Employer Taxes-admin	5152-002	160.88	1,947.73	1,768.68	1,947.00	100.04%	1,947.00	100.04%
Budgeted		160.88	1,947.73	0.00	1,947.00	100.04%	1,947.00	100.04%
Non-Budgeted		0.00						
Supplemental wages-Admin	5155-005	333.34	3,976.71	3,715.44	4,000.00	99.42%	4,000.00	99.42%
PROF EXPENSES--ADM	5159-009	26.27	345.61	428.07	500.00	69.12%	500.00	69.12%
Retirement -Admin	5170-001	177.00	2,124.00	2,102.00	2,124.00	100.00%	2,124.00	100.00%
Subtotal Administrator	5150	2,467.17	29,630.21	29,040.11	29,807.00	99.41%	29,807.00	99.41%
Budgeted		2,467.17	29,630.21	0.00	29,807.00	99.41%	29,807.00	99.41%
Non-Budgeted		0.00						
NURSERY	5200							
Salary/Wages-Nursery	5201-001	277.25	2,823.74	3,151.51	3,045.00	92.73%	3,045.00	92.73%
Employer Taxes-Nursery	5202-002							
FICA-Nursery	5203-002	17.18	205.81	224.59	220.00	93.55%	220.00	93.55%
Medicare-Nursery	5204-002	4.01	48.12	52.59	52.00	92.54%	52.00	92.54%
Subtotal Employer Taxes-nursery	5202-002	21.19	253.93	277.18	272.00	93.36%	272.00	93.36%
Budgeted		21.19	253.93	0.00	272.00	93.36%	272.00	93.36%
Non-Budgeted		0.00						
Nursery Contract Labor	5299-001	30.00	434.00	1,395.00	0.00	0.00%	0.00	0.00%



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		Current Period	Year to Date	YTD Prior Year	Year to Date Budget	YTD Budget Percentage	Annual Budget	Annual Budget Percentage
Subtotal Nursery	5200	328.44	3,511.67	4,823.69	3,317.00	105.87%	3,317.00	105.87%
<i>Budgeted</i>		328.44	3,511.67	0.00	3,317.00	105.87%	3,317.00	105.87%
<i>Non-Budgeted</i>		0.00						
DEVELOPMENTAL MINISTER	5400							
Salary/Wages DevMin	5401	2,802.14	33,459.11	28,788.00	33,459.00	100.00%	33,459.00	100.00%
FICA-DevMin	5403	346.34	4,156.08	3,959.04	4,155.00	100.03%	4,155.00	100.03%
Life Ins-DevMin	5404	0.00	843.14	834.68	843.00	100.02%	843.00	100.02%
SUPPLEMENT WAGES-DevMin	5405	192.00	2,617.71	6,982.84	2,618.00	99.99%	2,618.00	99.99%
Supple Wages-DevMinRetir	5405-001	382.76	2,296.56	0.00	0.00	0.00%	0.00	0.00%
SUPPLEMENT RET-Dev.Mi	5405-003	-0.01	1,913.69	0.00	4,978.00	38.44%	4,978.00	38.44%
Housing DevMin	5407	1,666.66	20,166.59	24,000.00	20,167.00	100.00%	20,167.00	100.00%
Professional Exp-DevMin	5408	0.00	5,475.58	6,689.44	7,000.00	78.22%	7,000.00	78.22%
Retirement DevMin	5409	448.67	5,384.04	5,279.00	4,935.00	109.10%	4,935.00	109.10%
Subtotal Developmental Minister	5400	5,838.56	76,312.50	76,533.00	78,155.00	97.64%	78,155.00	97.64%
<i>Budgeted</i>		5,455.80	74,015.94	0.00	78,155.00	94.70%	78,155.00	94.70%
<i>Non-Budgeted</i>		382.76	2,296.56					
Subtotal Personnel Expenses	5010	12,276.25	153,561.64	152,998.42	155,554.00	98.72%	155,554.00	98.72%
<i>Budgeted</i>		11,893.49	151,265.08	0.00	155,554.00	97.24%	155,554.00	97.24%
<i>Non-Budgeted</i>		382.76	2,296.56					
BOARD/PROGRAM EXPENSES	6000							
BOARD EXPENSES	6001							
BOT Retreat & Quart.	6002	0.00	383.04	535.04	1,000.00	38.30%	1,000.00	38.30%
Leadership Development	6010	0.00	705.31	297.64	750.00	94.04%	750.00	94.04%
Minister Search/Sabbatic	6050	0.00	0.00	0.00	835.00	0.00%	835.00	0.00%
Subtotal Board Expenses	6001	0.00	1,088.35	832.68	2,585.00	42.10%	2,585.00	42.10%
<i>Budgeted</i>		0.00	1,088.35	0.00	2,585.00	42.10%	2,585.00	42.10%
<i>Non-Budgeted</i>		0.00						
PROGRAMS	6100							
Art on the Walls	6105	0.00	0.00	189.57	230.00	0.00%	230.00	0.00%
Caring Committee	6110	0.00	22.31	217.72	250.00	8.92%	250.00	8.92%
Coffee Hour Expense	6120	197.81	647.71	757.69	700.00	92.53%	700.00	92.53%
Fellowship-General	6130	25.99	83.90	108.11	250.00	33.56%	250.00	33.56%
Lay Pastoral Care	6145	0.00	461.30	683.39	1,400.00	32.95%	1,400.00	32.95%
Membership Expense	6150	16.87	276.37	576.49	850.00	32.51%	850.00	32.51%

## Unitarian Universalist Church of Chattanooga

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		Current Period	Year to Date	YTD Prior Year	Year to Date Budget	YTD Budget Percentage	Annual Budget	Annual Budget Percentage
Music Program	6155	251.76	818.05	1,028.52	1,000.00	81.81%	1,000.00	81.81%
Small Group Ministry	6165	0.00	64.00	1,058.10	1,050.00	6.10%	1,050.00	6.10%
Social Justice	6167	0.00	1,444.88	1,361.42	1,000.00	144.49%	1,000.00	144.49%
Worship Programs Exp	6170	632.40	2,031.05	2,079.40	2,600.00	78.12%	2,600.00	78.12%
Subtotal Programs	6100	1,124.83	5,849.57	8,060.41	9,330.00	62.70%	9,330.00	62.70%
Budgeted		1,124.83	5,849.57	0.00	9,330.00	62.70%	9,330.00	62.70%
Non-Budgeted		0.00						
RELIGIOUS EDUCATION	6200							
Adult RE	6210	0.00	697.01	404.86	800.00	87.13%	800.00	87.13%
RE Youth	6220	1,049.02	5,750.54	5,511.93	5,962.00	96.45%	5,962.00	96.45%
Subtotal Religious Education	6200	1,049.02	6,447.55	5,916.79	6,762.00	95.35%	6,762.00	95.35%
Budgeted		1,049.02	6,447.55	0.00	6,762.00	95.35%	6,762.00	95.35%
Non-Budgeted		0.00						
Subtotal Board/program Expenses	6000	2,173.85	13,385.47	14,809.88	18,677.00	71.67%	18,677.00	71.67%
Budgeted		2,173.85	13,385.47	0.00	18,677.00	71.67%	18,677.00	71.67%
Non-Budgeted		0.00						
OPERATIONS	6300							
FACILITIES	6301							
Exterminating	6315	0.00	420.00	455.00	450.00	93.33%	450.00	93.33%
Repairs/Maint-Facilities	6325	17.91	514.15	1,149.64	1,600.00	32.13%	1,600.00	32.13%
Safety & Enhancement	6330	0.00	1,204.21	3,983.09	5,000.00	24.08%	5,000.00	24.08%
Security Management	6335	150.00	644.40	710.00	900.00	71.60%	900.00	71.60%
Supplies-Building	6340	0.00	760.04	770.62	500.00	152.01%	500.00	152.01%
Trash Services	6350	97.49	1,169.88	1,169.88	1,365.00	85.71%	1,365.00	85.71%
Subtotal Facilities	6301	265.40	4,712.68	8,238.23	9,815.00	48.02%	9,815.00	48.02%
Budgeted		265.40	4,712.68	0.00	9,815.00	48.02%	9,815.00	48.02%
Non-Budgeted		0.00						
GROUNDS	6370							
Landscaping	6371	9.99	203.73	442.44	1,000.00	20.37%	1,000.00	20.37%
Lawn Care	6372	0.00	0.00	0.00	1,500.00	0.00%	1,500.00	0.00%
Subtotal Grounds	6370	9.99	203.73	442.44	2,500.00	8.15%	2,500.00	8.15%
Budgeted		9.99	203.73	0.00	2,500.00	8.15%	2,500.00	8.15%
Non-Budgeted		0.00						

## Unitarian Universalist Church of Chattanooga

## Income and Expense Statement

Consolidated - June 2017

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		Current Period	Year to Date	YTD Prior Year	Year to Date Budget	YTD Budget Percentage	Annual Budget	Annual Budget Percentage
OFFICE EXPENSES	6400							
Copier Maintenance	6410	0.00	795.00	795.00	850.00	93.53%	850.00	93.53%
Office Equipment	6420	0.00	0.00	0.00	255.00	0.00%	255.00	0.00%
Postage	6440	0.00	196.45	344.64	330.00	59.53%	330.00	59.53%
Supplies-Office	6460	0.00	447.52	389.68	800.00	55.94%	800.00	55.94%
Subtotal Office Expenses	6400	0.00	1,438.97	1,529.32	2,235.00	64.38%	2,235.00	64.38%
<i>Budgeted</i>		0.00	1,438.97	0.00	2,235.00	64.38%	2,235.00	64.38%
<i>Non-Budgeted</i>		0.00						
OPERATIONS - GENERAL	6500							
Credit Card /PayPal Chrg	6506	0.00	27.09	0.00	0.00	0.00%	0.00	0.00%
Communications/Advertis	6507	192.00	553.17	1,056.42	1,000.00	55.32%	1,000.00	55.32%
Computer Services/Website	6509	0.00	143.64	266.10	700.00	20.52%	700.00	20.52%
Contingency Expense	6510	0.00	185.92	47.79	250.00	74.37%	250.00	74.37%
Domain Names	6512	0.00	76.55	0.00	0.00	0.00%	0.00	0.00%
Newsletter	6512-001	0.00	704.95	0.00	1,800.00	39.16%	1,800.00	39.16%
Insurance-Bldg/Liability	6525	0.00	4,166.00	4,075.00	4,500.00	92.58%	4,500.00	92.58%
Janitorial Service	6530	340.00	3,955.00	3,600.00	4,000.00	98.88%	4,000.00	98.88%
Classroom Equip&Maintain	6533	0.00	0.00	0.00	210.00	0.00%	210.00	0.00%
Supplies/Altar-Decoration	6541	0.00	0.00	200.00	200.00	0.00%	200.00	0.00%
Utilities Expense	6580							
Electricity	6581	476.49	5,290.31	5,190.41	6,000.00	88.17%	6,000.00	88.17%
Gas	6582	33.26	1,367.61	1,075.66	1,600.00	85.48%	1,600.00	85.48%
Internet Service/Phone	6583	128.75	1,545.00	1,416.25	1,550.00	99.68%	1,550.00	99.68%
Water	6585	113.65	1,303.55	927.02	1,500.00	86.90%	1,500.00	86.90%
Subtotal Utilities Expense	6580	752.15	9,506.47	8,609.34	10,650.00	89.26%	10,650.00	89.26%
<i>Budgeted</i>		752.15	9,506.47	0.00	10,650.00	89.26%	10,650.00	89.26%
<i>Non-Budgeted</i>		0.00						
Subtotal Operations - General	6500	1,284.15	19,318.79	17,854.65	23,310.00	82.88%	23,310.00	82.88%
<i>Budgeted</i>		1,284.15	19,291.70	0.00	23,310.00	82.76%	23,310.00	82.76%
<i>Non-Budgeted</i>		0.00	27.09					
STEWARDSHIP	6700							
Stewardship--Fellowship	6701	0.00	1,160.23	1,760.72	1,000.00	116.02%	1,000.00	116.02%
Stewardship--supplies	6705	0.00	0.00	165.06	200.00	0.00%	200.00	0.00%
Subtotal Stewardship	6700	0.00	1,160.23	1,925.78	1,200.00	96.69%	1,200.00	96.69%
<i>Budgeted</i>		0.00	1,160.23	0.00	1,200.00	96.69%	1,200.00	96.69%

## Unitarian Universalist Church of Chattanooga

## Income and Expense Statement

Consolidated - June 2017

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		Current Period	Year to Date	YTD Prior Year	Year to Date Budget	YTD Budget Percentage	Annual Budget	Annual Budget Percentage
<i>Non-Budgeted</i>		0.00						
Subtotal Operations	6300	1,559.54	26,834.40	29,990.42	39,060.00	68.70%	39,060.00	68.70%
<i>Budgeted</i>		1,559.54	26,807.31	0.00	39,060.00	68.63%	39,060.00	68.63%
<i>Non-Budgeted</i>		0.00	27.09					
DENOMINATIONAL EXPENSES	7000							
G.I.F.T Program	7020	0.00	12,398.00	12,830.00	12,397.00	100.01%	12,397.00	100.01%
TOTAL EXPENSES		16,009.64	206,179.51	210,628.72	225,688.00	91.36%	225,688.00	91.36%
<i>Budgeted</i>		15,626.88	203,855.86	0.00	225,688.00	90.33%	225,688.00	90.33%
<i>Non-Budgeted</i>		382.76	2,323.65					
EXCESS INCOME\EXPENSES		\$357.13	\$7,919.32	\$691.95	\$6,891.00	114.92%	\$6,891.00	114.92%
<i>Budgeted</i>		-148.11	9,354.97	0.00	6,891.00	135.76%	6,891.00	135.76%
<i>Non-Budgeted</i>		505.24	-1,435.65					

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		2018 Fiscal Year Budget	2017 Fiscal Year Actuals	2017 Fiscal Year Budget
INCOME	4000			
UNRESTRICTED	4020			
Net Pledges - Current FY	4030	175,418.00	180,000.00	179,944.00
Pledges - Prior FY	4040	1,500.00	2,400.00	1,500.00
Sunday Offertory	4050	5,600.00	5,600.00	6,000.00
Subtotal Unrestricted	4020	182,518.00	188,000.00	187,444.00
GIFT INCOME	4051			
Gifts	4051-400	1,050.00	1,550.00	1,050.00
Gifts In Memoriam	4051-410	500.00	100.00	500.00
Subtotal Gift Income	4051	1,550.00	1,650.00	1,550.00
INCOME ALL FUNDRAISERS	4100			
Fundraiser Income	4100-400	400.00	0.00	1,000.00
INTEREST INCOME	4500			
Banking Interest	4510	7.00	7.00	7.00
Savings Acct Interest	4512	75.00	62.00	75.00
Endowment CD Interest	4515	150.00	150.00	150.00
Regular CD Interest	4520	64.00	30.00	64.00
Subtotal Interest Income	4500	296.00	249.00	296.00
MISCELLANEOUS INCOME	4600			
Hospitality Income	4610			
Photocopy Income	4621	12.00	12.00	12.00
Subtotal Miscellaneous Income	4600	12.00	12.00	12.00
RENTS AND LEASES	4700			
Cell Tower Income	4703-005	16,344.00	16,008.00	15,081.00
Bridge Club	4704	200.00	260.00	200.00
Chions	4707	150.00	150.00	100.00
Church of God	4708	0.00	0.00	25,000.00
12-Step Group	4709	300.00	200.00	0.00
India Society	4710			
Special Rentals	4711	800.00	800.00	500.00
WE Church	4712	600.00	300.00	0.00
Wedding/Comm Ceremony	4721			
Subtotal Rents And Leases	4700	18,394.00	17,718.00	40,881.00
TOTAL INCOME		203,170.00	207,629.00	231,183.00
EXPENSES	5000			
PERSONNEL EXPENSES	5010			
DIRECTOR OF MUSIC	5080			
Salary/Wages-DirMusic	5081-001	10,332.00	10,031.00	10,031.00
Employer Taxes-DirMus	5082-002			
FICA-DirMus	5083-002	641.00	638.00	622.00
Medicare-DirMus	5084-002	150.00	141.00	147.00
Subtotal Employer Taxes-dirmus	5082-002	791.00	787.00	769.00
Prof Expenses-DirMus	5088-008	500.00	150.00	500.00
Subtotal Director Of Music	5080	11,623.00	10,968.00	11,300.00
DIR RELIGIOUS EDUCATION	5090			
Salary/Wages-DRE	5091-001	29,039.00	24,308.00	24,310.00
Employer Taxes-DRE	5092-002			
FICA-DRE	5093-002	1,800.00	1,764.00	1,507.00
Medicare-DRE	5094-002	421.00	412.00	353.00
Subtotal Employer Taxes-dre	5092-002	2,221.00	2,176.00	1,860.00

Supplemental wages-DRE	5095-005	0.00	4,000.00	4,000.00
PROF. EXPENSES--DRE	5098-008	2,504.00	400.00	2,431.00
Retirement DRE	5099	2,904.00	2,431.00	2,431.00
Subtotal Dir Religious Education	5090	36,668.00	33,315.00	35,032.00
ADMINISTRATOR	5150			
Salary/Wages-Admin	5151-001	23,000.00	21,236.00	21,236.00
Employer Taxes-Admin	5152-002			
FICA-Admin	5153-002	1,426.00	1,578.00	1,317.00
Medicare-Admin	5154-002	334.00	369.00	308.00
Subtotal Employer Taxes-admin	5152-002	1,760.00	1,947.00	1,625.00
Supplemental wages-Admin	5155-005	0.00	4,000.00	4,000.00
PROF EXPENSES--ADM	5159-009	500.00	500.00	500.00
Retirement -Admin	5170-001	0.00	2,123.00	2,124.00
Subtotal Administrator	5150	25,260.00	29,806.00	29,485.00
NURSERY	5200			
Salary/Wages-Nursery	5201-001	4,100.00	3,045.00	6,400.00
Employer Taxes-Nursery	5202-002			
FICA-Nursery	5203-002	254.00	220.00	397.00
Medicare-Nursery	5204-002	59.00	52.00	93.00
Subtotal Employer Taxes-nursery	5202-002	313.00	272.00	490.00
Subtotal Nursery	5200	4,413.00	3,729.00	6,890.00
DEVELOPMENTAL MINISTER	5400			
Salary/Wages DevMin	5401	34,683.00	33,459.00	33,844.00
FICA-DevMin	5403	4,757.00	4,155.00	4,119.00
Life Ins-DevMin	5404	865.00	843.00	911.00
SUPPLEMENT WAGES-DevMin	5405	6,897.00	2,618.00	2,304.00
SUPPLEMENT RET-Dev.Mi	5405-003	0.00	4,978.00	4,593.00
Housing DevMin	5407	20,600.00	20,167.00	20,000.00
Professional Exp-DevMin	5408	5,528.00	7,000.00	7,000.00
Retirement DevMin	5409	5,528.00	4,935.00	5,384.00
Subtotal Developmental Minister	5400	78,858.00	78,155.00	78,155.00
Subtotal Personnel Expenses	5010	156,822.00	155,973.00	160,862.00
BOARD/PROGRAM EXPENSES	6000			
BOARD EXPENSES	6001			
BOT Retreat & Quart.	6002	1,000.00	433.00	1,000.00
Leadership Development	6010	1,000.00	750.00	750.00
Minister Search/Sabbatic	6050	250.00	5,000.00	835.00
Subtotal Board Expenses	6001	2,250.00	6,183.00	2,585.00
PROGRAMS	6100			
Art on the Walls	6105	230.00	0.00	230.00
Caring Committee	6110	250.00	30.00	250.00
Coffee Hour Expense	6120	700.00	538.00	700.00
Denominational Affairs	6125			
Fellowship-General	6130	250.00	70.00	250.00
Lay Pastoral Care	6145	1,400.00	550.00	1,400.00
Membership Expense	6150	1,420.00	312.00	850.00
Music Program	6155	1,000.00	750.00	1,000.00
Small Group Ministry	6165	1,000.00	76.00	1,050.00
Social Justice	6167	2,000.00	1,400.00	1,000.00
Worship Programs Exp	6170	2,100.00	1,680.00	2,600.00
Subtotal Programs	6100	10,350.00	5,406.00	9,330.00
RELIGIOUS EDUCATION	6200			
Adult RE	6210	800.00	730.00	800.00
RE Youth	6220	6,100.00	5,000.00	5,962.00
Subtotal Religious Education	6200	6,900.00	5,730.00	6,762.00

Subtotal Board/program Expenses	6000	19,500.00	17,319.00	18,677.00
OPERATIONS	6300			
FACILITIES	6301			
Exterminating	6315	450.00	420.00	450.00
Repairs/Maint-Facilities	6325	600.00	600.00	1,600.00
Safety & Enhancement	6330	2,000.00	1,472.00	5,000.00
Security Management	6335	600.00	600.00	900.00
Supplies-Building	6340	650.00	650.00	500.00
Trash Services	6350	1,200.00	1,200.00	1,365.00
Subtotal Facilities	6301	5,500.00	4,992.00	9,815.00
GROUNDS	6370			
Landscaping	6371	1,150.00	150.00	1,000.00
Lawn Care	6372	250.00	25.00	1,500.00
Subtotal Grounds	6370	1,400.00	175.00	2,500.00
OFFICE EXPENSES	6400			
Copier Maintenance	6410	850.00	800.00	850.00
Office Equipment	6420	75.00	50.00	255.00
Postage	6440	350.00	300.00	330.00
Supplies-Office	6460	800.00	500.00	800.00
Subtotal Office Expenses	6400	2,075.00	1,650.00	2,235.00
OPERATIONS - GENERAL	6500			
Credit Card /PayPal Charg	6506	100.00	40.00	0.00
Communications/Advertis	6507	1,000.00	411.00	1,000.00
Computer Services/Website	6509	700.00	180.00	700.00
Contingency Expense	6510	500.00	250.00	250.00
Domain Names	6512	80.00	80.00	0.00
Newsletter	6512-001	0.00	705.00	1,800.00
Green Initiatives Expense	6515			
Insurance-Bldg/Liability	6525	4,300.00	4,200.00	4,500.00
Lewis Property Taxes	6527	200.00	200.00	0.00
Janitorial Service	6530	4,420.00	4,125.00	4,000.00
RE Classroom Equip&Maint	6533	110.00	100.00	210.00
Supplies/Altar-Decoration	6541	200.00	0.00	200.00
Utilities Expense	6580	0.00	0.00	0.00
Electricity	6581	5,300.00	5,100.00	6,000.00
Gas	6582	1,650.00	1,626.00	1,600.00
Internet Service/Phone	6583	1,550.00	1,545.00	1,550.00
Water	6585	1,200.00	1,270.00	1,500.00
Subtotal Utilities Expense	6580	9,700.00	9,541.00	10,650.00
Subtotal Operations - General	6500	21,310.00	19,832.00	23,310.00
Subtotal Operations	6300	30,285.00	26,649.00	37,860.00
STEWARDSHIP	6700			
Stewardship--Fellowship	6701	1,500.00	1,300.00	1,000.00
Stewardship--supplies	6705	0.00	200.00	200.00
Subtotal Stewardship	6700	1,500.00	1,500.00	1,200.00
DENOMINATIONAL EXPENSES	7000			
G.I.F.T Program	7020	13,863.00	13,638.00	12,397.00
TOTAL EXPENSES		221,970.00	199,941.00	230,996.00
TOTAL BUDGETED INCOME/EXPENSE -		-18,800.00	7,688.00	187.00

## **Religious Education Report For July 2017 UUCC Board Meeting**

### **K-12 RE**

Kay has been on vacation through the month of July. Emily Sartain has filled in and all has gone well.

We are still needing another teacher for the Medievals rotation.

The following (in blue) are the minutes taken by Wendy Sapp during the RE Committee meeting on July 9.

#### RE Committee Report

July 9, 2017

Attendees: Emily Sartain, Mary Lou Reed, Leslie Brock, Gale Audier, Wendy Sapp

#### Reviewed DRE report

- Committed agreed to continue with plan to try Children's Chapel
- Emily will coordinate with Kay on first Children's Chapel in August

Gale will plan Medieval's team meeting in early August

Reviewed Kay's revised job description

#### DRE Evaluation:

- Reviewed all responses
- Came to consensus on areas in which there was significant variety in responses
- Emily will send blank evaluation to Cathy and ask her to complete and ask her if she would like to sit down with Emily and Kay to review the evaluation and Kay's self-evaluation

### **Adult RE update**

Tom Kunesh has worked out with JW Cole to swap rooms so the UUCC adult class can use the Forum room with its AV system and WE Church will use the Sprouts room for their small Wednesday night group.

For the adult class he plans to use the Jane Goodall Masterclass curriculum discussing animal intelligence, conservation and activism. Cost is \$90 for the full masterclass. Classes will run Sept. 7 through December at 7 pm on Wednesday nights. (To be discussed as per Bart's meeting agenda item #15).



## Board Report – VP Outreach Ministry – July 18, 2017

### **The Social Justice Team:**

1. Continues to provide meals and caregiving for Welcome Home Chattanooga;
  2. Provides stress reduction workshops for Father to the Fatherless & will be helping organize mentoring when school starts;
  3. Continues participation in CALEB – Chattanooga in Action for Love, Equality & Benevolence;
  4. Is helping to organize October workshops for Father Lapsley's organization, Healing Memories;
  5. Offers summer movies with Social Justice themes at UUCC;
  6. Participated in 3 Healthcare demonstrations and 1 LGBTQ march (for which we were in the newspaper twice!);
  7. Co-sponsors potluck and music events with Reverse Ferret and Roger Davis's band this summer. Sharing food, listening and dancing to music are important in helping release stress and supports bonding with the community which gives us energy to continue SJ work.
  8. Scheduled our final meeting with the East Third Street Church of Christ conversations on race and racism for August 1. That meeting will include watching the documentary film on Ed Johnson. The WE church is also invited to join us along with any other members of the community.
- Judith, chair of the SJ team, has accepted an invitation to be on the UU TN Social Justice Board/Advisory Board.

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### **Membership:**

As the VP of Outreach Ministry, I'm looking forward to working with our new administrator on her role of Membership Coordinator. Through this collaboration, we will be able to develop a more dynamic process for visitors and new members.

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### **Communications:**

Chen Zhang and Sally Peixoto officially joined the Communications Team in June.

At the last Communication Team meeting an evaluation of the team's deliverables and services was done. The idea to do an annual evaluation came from Tom Kunesh, and Chen and Sally facilitated the discussion. The "I Like", "I Wish", "I Wonder" model was used. The evaluation covered the nUUsletter, website, social media, signage, wifi/internet access, and advertising (WUTC & on Facebook). A number of improvements and changes were discovered and discussed.

- Chen and Anne will be doing a website audit to improve usability.
- Anne will be training backups for the newsletter and website.
- A discussion centered on how to get more participation from committees and members in writing for the newsletter and posting on social media.
- Anne is recruiting photographers from our members/friends who will be responsible for taking pictures during activities both at UUCC and in the greater community for the newsletter and social media.
- The team is expanding social media into Pinterest and possibly Reddit.
- The Team hopes to survey UUCC members to learn more about how they use the website, what they would like to see, and what they like and don't want to change!

Submitted by Linda Park, July 18, 2017

## **Disruptive Persons Policy, July 2017**

In furtherance of the UUCC goal of maintaining a safe, welcoming, and healthy environment for all members, staff and visitors, the UUCC has adopted a policy for identifying and correcting the behavior of anyone who would disrupt progress toward this goal. The process laid out below should be known to all and followed when occasions arise which appear to interfere with a safe, welcoming and healthy environment.

Disruptive words or actions should be differentiated from personality conflicts or disagreements on facts or opinions, which are treated under the UUCC policies on developing right relations. Behaviors which rise to the level of a disruptive incident would normally be any that affect

- The safety of individuals because of a threat or perceived threat,
- Actual Interference or threat of interference in any church activity,
- Encounters that are abusive, deceitful, or may be perceived to cause current or future members to abandon the church.

Responsibility for interrupting the course of disruptive behavior may be assumed by any congregant, staff member, or visitor who observes an incident. The observer should intervene if there is threatening or abusive activity, to try to escort the victim of bullying or rancor to a safer area. After the incident, the observer should report to any member of the board, in writing, the nature of the incident, giving time, place, and persons involved or witnessing it; the Board President will receive and analyze the report, and if the action is judged to be possibly disruptive, will ask two more members of the board or of active church committees, to join in meeting with the alleged offender. At the meeting, the three will explain the damaging nature of the behavior and its outcomes, and ask for apology, if warranted. They will explain this Disruptive Persons policy, and advise of the escalations it stipulates, as follows:

- The first offense results in the warning now being administered, and guidance in right behavior;
- The second offense results in a severe warning, giving additional guidance, and advising that a third offense, absent mitigating circumstances, will result in severance of the offender's relationship with the UUCC. The committee of three will point out that the board will not decide whether to terminate, but the offender will, himself or herself, determine this through future behavior.
- Report of a third offense will cause the full board to review the case and determine if the third disruption is, effectively, the offender's decision to resign from the church. If so, he or she will be asked for a resignation from the church or be otherwise terminated, and barred from church premises and activities. The Board President and the two other members involved in the case so far will meet the offender and carry out the severance from membership.

If the offender does not accept the final discipline for disruptive behavior, he or she may request a meeting with the full board to review the case. The board will hear the appeal presented by the offender, as well as any supportive persons who speak on his or her behalf, and by vote of a majority will determine whether to readmit the person to membership.

Each meeting should take place within two weeks of learning of the latest disruptive incident. To each meeting, the person accused of disruptive behavior may bring a support person, who may speak in the

person's defense. If there are mitigating circumstances learned at any meeting, or a successful defense is presented, the report of the incident will be destroyed and the meeting will not be considered an escalation event. Every meeting must be fully documented by a participant appointed as secretary, and the board must keep this file of the meetings and interactions among the participants throughout the entire process. The file of reports will be considered active for two years, after which if no additional disruptive incidents have taken place, the file will be discarded, and any new disruptive incident will start the process anew.

## Benevolence Fund Policy

June 1, 2017

The Goal of the Benevolence Fund is to provide temporary financial assistance to those members in the congregation in need of help. In meeting this goal, the UUCC Benevolence fund will:

1. Fully comply with IRS regulations affecting 501(c)(3) charitable entities.
2. Balance member confidentiality with fiscal control.

The Minister, the church Administrator and the church Treasurer will be in charge of the operations of the fund. The minister will be responsible for handling the checkbook, writing checks and balancing the account. In the minister's absence, the church Treasurer or Board President will oversee these tasks.

Application Process: The church member must complete and sign a brief application form (see attached). The minister must validate that the applicant has been a member for one full year and has not previously received funds in excess of \$250 over the last 12-month period. For any amounts in excess of this, the UUCC board President must also approve these unusual situations.

Since the IRS frowns on repeat donations to the same individuals year after year, any individual receiving funds three years in a row will be issued a 1099 form on the third request and will be responsible for paying taxes on those funds.

Up to three times per year, the congregation will be asked to support the Benevolence fund through targeted collections. Monies will be counted and deposited into the church's standard checking account. As needed, the Church Administrator will replenish the funds in our Benevolence Fund by writing a check to this account.

When appropriate, the Minister may help direct the applicant to other community resources that provide help with food, clothing, shelter, etc.

## Benevolence Fund Application

Date: \_\_\_\_\_

Congregant's Name: \_\_\_\_\_

Current Address: \_\_\_\_\_

Phone contact/email: \_\_\_\_\_

Short explanation of request for funds:

1. Food ( )
2. Clothing ( )
3. Housing ( )
4. Utilities ( )
5. Car repair ( )
6. Medical ( )
7. Other

\_\_\_\_\_

8. Amount Requested \_\_\_\_\_

Short explanation of request for financial help

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I do not have the financial capabilities to pay for the above mentioned request for funds.

Applicant Signature: \_\_\_\_\_

Minister Approval: Yes \_\_\_\_\_ No \_\_\_\_\_

Minister's Signature: \_\_\_\_\_