



Unitarian Universalist Fellowship of Gainesville

UUFG Governing Board Meeting Agenda
February 26, 2024 – 6:30 pm to 8:30 pm

UUFG Covenant

In our relationships to one another, we covenant to:

- Respect and value every person in our congregation during times of agreement and disagreement,
- Minister to each other, celebrate our joys and give support in times of sorrow,
- Make decisions through a democratic process, participate, and respect the outcomes of the collective wisdom,
- Minister to each other, celebrate our joys and give support in times of sorrow,
- Make decisions through a democratic process, participate, and respect the outcomes of the collective wisdom,
- Set a positive example for children through our words, actions and instructions, while cherishing them as unique individuals,
- Give our time, energy, voices and economic resources to the common good,
- In all things be guided by our Unitarian Universalist principles.

1. [6:30 pm] Gathering and Meeting Preparation 10 min
 - a. Welcome, Call to Order, Quorum
 - b. Chalice Lighting and Reading
 - c. Board Covenant: *Inspired by our Unitarian Universalist principles, together we guide our congregation and its mission and vision with transparency, gratitude, trust and respect.*
 - d. Personal Check-In
 - e. Confirm agenda and roles (timekeeper, gratitude notes, external observer)
2. [6:40 pm] Congregational Input 10 min
3. [6:50 pm] Consent Agenda 15 min
 - a. Treasurer's Report Jan 2024 (Att. 1)
 - b. Revised Fund and Balance Sheet Reports Dec 2023 (Att. 2)
 - c. Fellowship Council Feb 2024 (Att. 3)
 - d. Board Meeting Minutes Jan 2024 (Att. 4)
 - e. Admin Report Feb 2024 (Att. 5)
4. [7:05 pm] Discussion, Action Items, Visioning 35 min
 - a. Article II Listening Circles – Erin Parish
 - b. LCD Charter revision (Att. 6)
 - c. LDC policy on recruitment and term limits
 - d. Interim minister search committee update
 - e. Foundation Annual Report (Att. 7)
5. [7:40 pm] Management and Facilities 15 min
 - a. Classroom rental for adult daycare provider



Unitarian Universalist Fellowship of Gainesville

- b. Drop box for petitions for Medicaid Expansion (Att. 8)

- 6. [7:55 pm] Wrap up 5 min
 - a. Emerging Concerns
 - b. Calendaring and Action Items
 - c. Gratitude notes
 - d. Board Process – external observer
 - e. Next meeting March 25, 2024

- 7. [8:00] Adjournment

Unitarian Universalist Fellowship - Gainesville FL								
Treasurer's Report as of January 2024 for General Fund								
Thursday, February 15, 2024								
Account #	Account Name	Period Activity January 2024	Monthly Budget	YTD Balance	Budget YTD	Over/Under YTD+(-)	Annual Budget	Annual Budget Remaining
Income								
Income to General Fund								
Sustaining Gifts-Members & Friends								
4.100.030	Current Years Pledges	32,347.14	23,333.00	163,501.08*	163,331.00	170.08	280,000.00	116,498.92
4.100.050	Sunday Collect/Unidentified G	1,401.05	1,333.00	6,599.54	9,331.00	(2,731.46)	16,000.00	9,400.46
	Total Sustaining Gifts-Members & Friends	\$33,748.19	\$24,666.00	\$170,100.62	\$172,662.00	(\$2,561.38)	\$296,000.00	\$125,899.38
Miscellaneous Income								
4.100.210	Rental Income	1,697.00	1,000.00	7,131.00*	7,000.00	131.00	12,000.00	4,869.00
4.100.300	Special Activities and Auction	1,323.25	833.00	1,323.25	5,831.00	(4,507.75)	10,000.00	8,676.75
4.100.330	Interest	44.92	25.00	311.01*	175.00	136.01	300.00	(11.01)
	Total Miscellaneous Income	\$3,065.17	\$1,858.00	\$8,765.26	\$13,006.00	(\$4,240.74)	\$22,300.00	\$13,534.74
	Total Income to General Fund	\$36,813.36	\$26,524.00	\$178,865.88	\$185,668.00	(\$6,802.12)	\$318,300.00	\$139,434.12
	Total Income	\$36,813.36	\$26,524.00	\$178,865.88	\$185,668.00	(\$6,802.12)	\$318,300.00	\$139,434.12
Expense								
Expenses from General Fund								
Programs								
5.100.110	Membership	100.89	50.00	466.93*	350.00	116.93	600.00	133.07
5.100.120	UU Leadership	0.00	50.00	253.07	350.00	(96.93)	600.00	346.93
5.100.130	Social Justice	148.88	125.00	430.58	875.00	(444.42)	1,500.00	1,069.42
5.100.140	RELATE	0.00	13.00	0.00	91.00	(91.00)	150.00	150.00
5.100.150	CUUPS	0.00	21.00	0.00	147.00	(147.00)	250.00	250.00
5.100.240	RE Program Activities	195.90	167.00	802.37	1,169.00	(366.63)	2,000.00	1,197.63
5.100.280	Hospitality Budgeted	27.46	17.00	27.46	119.00	(91.54)	200.00	172.54
5.100.300	Special Activities and Auction Expenses	424.64	0.00	424.64*	0.00	424.64	0.00	(424.64)
5.100.310	Worship - Sunday Services	1,179.80	333.00	4,877.42*	2,331.00	2,546.42	4,000.00	(877.42)
5.100.320	Music Program	0.00	200.00	0.00	1,000.00	(1,000.00)	2,000.00	2,000.00
5.100.410	Canvass Expenses	0.00	0.00	0.00	0.00	0.00	500.00	500.00
5.100.430	Book Cart Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Total Programs	\$2,077.57	\$976.00	\$7,282.47*	\$6,432.00	\$850.47	\$11,800.00	\$4,517.53
Administration & Operational Support								
5.100.010	Board Discretionary Funds	0.00	125.00	0.00	875.00	(875.00)	1,500.00	1,500.00
5.100.020	Pastoral Care Expense	0.00	17.00	66.00	119.00	(53.00)	200.00	134.00
5.100.030	Contributions to Reserves	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5.100.520	Denominational Dues	1,294.00	1,294.00	9,058.00	9,058.00	0.00	15,525.00	6,467.00
5.100.525	Insurance	1,538.35	1,500.00	10,568.30	11,500.00	(931.70)	19,000.00	8,431.70
5.100.530	Office Expense	993.71	583.00	3,810.57	4,081.00	(270.43)	7,000.00	3,189.43
5.100.540	Bookkeeper	150.00	208.00	862.50	1,456.00	(593.50)	2,500.00	1,637.50
5.100.545	Telephone & Internet	604.91	482.00	3,490.78	3,764.00	(273.22)	7,100.00	3,609.22
5.100.550	Utilities - Electricity & Water	1,684.72	1,667.00	8,741.11	11,669.00	(2,927.89)	20,000.00	11,258.89
5.100.560	Waste Disposal	197.42	200.00	1,463.70*	1,400.00	63.70	2,400.00	936.30
5.100.570	Custodial Service	770.00	770.00	5,390.00	5,390.00	0.00	9,240.00	3,850.00
5.100.572	Custodial Supplies	0.00	69.00	59.95	483.00	(423.05)	825.00	765.05
5.100.575	Facilities Maintenance	295.00	625.00	6,915.93*	4,375.00	2,540.93	7,500.00	584.07
5.100.580	Backflow and Fire Suppression	30.00	333.00	755.00	2,331.00	(1,576.00)	4,000.00	3,245.00
5.100.583	Security & Safety	0.00	25.00	317.00*	175.00	142.00	300.00	(17.00)
5.100.585	Pest Control	0.00	0.00	400.00	400.00	0.00	400.00	0.00
5.100.595	VANCO and Bank Fees	144.71	146.00	1,036.13*	1,022.00	14.13	1,750.00	713.87

Unitarian Universalist Fellowship - Gainesville FL								
Treasurer's Report as of January 2024 for General Fund								
Thursday, February 15, 2024								
Account #	Account Name	Period Activity January 2024	Monthly Budget	YTD Balance	Budget YTD	Over/Under YTD+(-)	Annual Budget	Annual Budget Remaining
Total Administration & Operational Support		\$7,702.82	\$8,044.00	\$52,934.97	\$58,098.00	(\$5,163.03)	\$99,240.00	\$46,305.03
Compensation & Related Expenses								
5.100.610	Ministers Salary	3,102.58	6,261.00	14,278.67	39,827.00	(25,548.33)	71,126.00	56,847.33
5.100.620	Ministers Housing Allowance	0.00	0.00	4,000.00	4,000.00	0.00	4,000.00	0.00
5.100.630	Ministers, In Lieu of Self Employment Tax	0.00	486.00	423.76	3,402.00	(2,978.24)	5,829.00	5,405.24
5.100.640	Ministers Pension Fund	0.00	684.00	553.93	4,788.00	(4,234.07)	8,203.00	7,649.07
5.100.650	Ministers Health Insurance	0.00	1,211.00	1,471.12	8,477.00	(7,005.88)	14,534.00	13,062.88
5.100.660	Ministerial Transition Expense	0.00	1,042.00	0.00	7,294.00	(7,294.00)	12,500.00	12,500.00
5.100.670	Ministers Professional Expenses	0.00	667.00	122.89	4,669.00	(4,546.11)	8,000.00	7,877.11
5.100.680	Contributions to Ministers Sabbatical Fund	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5.100.710	Congregational Administrator Salary	3,576.79	3,435.00	24,231.42*	24,045.00	186.42	41,215.00	16,983.58
5.100.712	Congregational Administrator-Professional Expenses	0.00	167.00	100.00	1,169.00	(1,069.00)	2,000.00	1,900.00
5.100.720	Choir Director Salary	1,639.54	2,174.00	6,982.29	15,218.00	(8,235.71)	26,088.00	19,105.71
5.100.721	Director of Music Programming Salary	0.00		885.89				
5.100.722	Music Director's Professional Expenses	0.00	260.00	0.00	1,300.00	(1,300.00)	2,600.00	2,600.00
5.100.725	Pianist/Accompanist - Payroll	300.00	1,105.00	2,800.00	7,735.00	(4,935.00)	13,261.00	10,461.00
5.100.728	Audiovisual Technician	249.50	667.00	1,189.25	4,669.00	(3,479.75)	8,000.00	6,810.75
5.100.731	Director of RE Salary	2,181.96	2,174.00	14,229.26	15,218.00	(988.74)	26,088.00	11,858.74
5.100.732	Director of Religious Education-Professional Exp.	209.63	217.00	633.63	1,519.00	(885.37)	2,600.00	1,966.37
5.100.740	Child Care	581.79	500.00	3,820.46*	3,500.00	320.46	6,000.00	2,179.54
5.100.820	Staff Pensions	517.58	343.00	2,401.00	2,401.00	0.00	4,121.00	1,720.00
5.100.910	Payroll Tax Expenses	886.20	600.00	4,896.03*	4,200.00	696.03	7,200.00	2,303.97
Total Compensation & Related Expenses		\$13,245.57	\$21,993.00	\$83,019.60	\$153,431.00	(\$71,297.29)	\$263,365.00	\$181,231.29
Total Expenses from General Fund		\$23,025.96	\$31,013.00	\$143,237.04	\$217,961.00	(\$75,609.85)	\$374,405.00	\$232,053.85
Total Expense		\$23,025.96	\$31,013.00	\$143,237.04	\$217,961.00	(\$75,609.85)	\$374,405.00	\$232,053.85
Difference		\$13,787.40	(\$4,489.00)	\$35,628.84	(\$32,293.00)		(\$56,105.00)	
* = Income/Expense exceeds amount budgeted to date								

		Unitarian Universalist Fellowship - Gainesville, FL			
		Budget Variance Report			
		January 2024			
Account #	Account Name				
Income					
Income to General Fund					
Sustaining Gifts-Members & Friends					
4.100.030	Current Years Pledges	January receipts are a over budget because some donations that came in late December were not deposited until January.			
4.100.050	Sunday Collect/Unidentified Giving	Through January, Sunday collection is under budget by \$2731.			
Miscellaneous Income					
4.100.210	Rental Income	Main rental income from the Gainesville Bridge Club and Joy of the Lord Outreach Ministries. In January, we had payments from LifeLine Screening as well, which put us over budget for the month.			
4.100.300	Special Activities-Auction	Income from special activities is budgeted at \$10,000 for the year. In January, we started receiving payments for the auction.			
4.100.330	Interest				
Expense					
Expenses from General Fund					
Programs					
5.100.110	Membership	This month, expenses were for Nametags and cake reimbursement			
5.100.120	UU Leadership				
5.100.130	Social Justice	new UUFG banner purchased for marches			
5.100.140	RELATE				
5.100.150	CUUPS				
5.100.240	RE Program Activities				
5.100.280	Hospitality Budgeted				
5.100.300	Special Activities and Auction Expenses	Auction expenses			
5.100.310	Worship - Sunday Services	In January, we provided honorariums to Rev. Tracie Barrett, Richard MacMaster, and Paul Ortiz.			
5.100.320	Music Program				
5.100.410	Canvass Expenses				
5.100.420	Fundraising Expenses				
5.100.430	Book Cart Expense				
Administration & Operational Support					
5.100.010	Board Discretionary Funds				
5.100.020	Pastoral Care Expense				
5.100.030	Contributions to Reserves	Monthly payment, budgeted at 0 for this year			
5.100.520	Denominational Dues	Monthly payment. Our current dues are based on our 2021-2022 FY figures, which is why they are lower than normal.			
5.100.525	Insurance				
5.100.530	Office Expense	Includes contracts with Konica Minolta, MailChimp and Office 365. In January, credit card payments for directories (postage/envelopes) came due			
5.100.540	Bookkeeper	Contract with Mignon Craig, bookkeeper			
5.100.545	Telephone & Internet	Includes contract with Cox Communications, webhosts and other related services			
5.100.550	Utilities - Electricity	GRU/electric & water expenses. GRU applied a refund in October and November, which is why we are under budget for the year			
5.100.560	Waste Disposal	Contract with Waste Pro			
5.100.570	Custodial Service	Contract with One Guy Cleaning & Repair, Inc., Juan Rivera proprietor			
5.100.572	Custodial Supplies				
5.100.575	Facilities Maintenance	January expenses were plumbing & more front door repair			
5.100.580	Backflow and Fire Suppression				
5.100.583	Security & Safety	We are now paying for background checks using the Security line item.			
5.100.585	Pest Control	Melrose Pest Control's annual termite treatment was performed in September			
5.100.595	VANCO and Bank Fees	Vanco manages our online donations.			

Unitarian Universalist Fellowship - Gainesville FL						
Consolidated Fund Activity Report for January 2024						
Thursday, February 15, 2024						
Account #	Account Name	Beg Balance	Receipts	Disbursements	Transfers/JE's	End Balance
3.100.100	General Fund Balance	78,850.68	36,813.36	23,025.96	0.00	92,638.08
3.100.301	Ministers Discretionary Pass Through Fund Balance	0.00	280.00	280.00	0.00	0.00
3.100.321	Minister's Sabbatical Fund Balance	27,908.58	0.00	0.00	0.00	27,908.58
3.201.120	CUUPS Support Fund Balance	631.00	0.00	0.00	0.00	631.00
3.202.100	Music Support Fund	1,087.00	0.00	0.00	0.00	1,087.00
3.203.110	Memory Garden Fund	648.11	0.00	95.00	0.00	553.11
3.203.120	Courtyard Fund Balance	2,590.16	0.00	45.00	0.00	2,545.16
3.203.130	Solar Panel Fund Balance	11,342.00	14,000.00	11,342.00	0.00	14,000.00
3.203.140	Interim Ministry Fund Balance	49,406.00	0.00	0.00	0.00	49,406.00
3.203.150	Labyrinth Fund Balance	2,000.00	0.00	0.00	0.00	2,000.00
3.204.110	Book Cart Fund	728.90	0.00	0.00	0.00	728.90
3.206.100	<i>Foundation Grants</i>					
3.206.113	Youth Room Update (Grant) Fund Balance	1,355.87	0.00	0.00	0.00	1,355.87
3.206.114	General Assembly Youth Travel (Grant) Balance	895.45	0.00	0.00	0.00	895.45
3.206.115	Banned Books (Grant) Fund Balance	462.39	0.00	0.00	0.00	462.39
3.206.116	Security Camera Grant Balance	600.00	0.00	0.00	0.00	600.00
3.206.140	UU Leadership Fund - Balance	3,619.40	0.00	0.00	0.00	3,619.40
3.210.100	<i>CYREC</i>					
3.210.110	RE Fund Balance	2,774.70	300.00	0.00	0.00	3,074.70
3.210.120	Youth Support Fund Balance	1,070.91	0.00	0.00	0.00	1,070.91
3.210.125	OWL Fund Balance	790.47	0.00	80.76	0.00	709.71
3.210.160	Playground/Coffee Fund Balance	95.00	0.00	0.00	0.00	95.00
3.216.100	<i>Social Justice Fund</i>					
3.216.110	Social Justice Unallocated Funds	3,060.25	100.00	0.00	0.00	3,160.25
3.216.150	Pineridge Fund	993.20	0.00	0.00	0.00	993.20
3.216.160	Share The Plate Balance	115.00	500.55	0.00	0.00	615.55
3.400.100	<i>Future Funding & Capital Reserve Accounts</i>					
3.404.110	Res. Fd for Large Scale Maintenance-Balance	53,994.57	0.00	0.00	0.00	53,994.57
3.500.100	Land & Building Fund	1,105,900.00	0.00	0.00	0.00	1,105,900.00
3.500.150	Furnishings & Equipment Fund	62,670.00	0.00	0.00	0.00	62,670.00
3.500.155	Solar Fund Bank Account Balance	58,523.75	0.00	36,288.00	0.00	22,235.75
3.500.200	UUFG Foundation Balance	414,446.96	500.00	0.00	46,287.03	461,233.99
3.500.250	Ministers Discretionary Fund Bank Account Balance	319.99	0.00	0.00	0.00	319.99
	Total	\$1,886,880.34	\$52,493.91	\$71,156.72	\$46,287.03	\$1,914,504.56

Unitarian Universalist Fellowship - Gainesville
Consolidated Fund Narrative Report
January 2024

Account #	Account Name	Name	Source	Purpose
3.100.100	General Fund Balance			Beginning Bal is last month's ending balance. Receipts are the total income for the month. Disbursements are the total expenses for the month. End Balance equals the beginning balance, plus income, minus expenses.
3.100.301	Ministers Discretionary Fund Balance	Mary Anthony	Donations	This is a pass-thru account. We transfer this money to a separate checking account that the minister manages. Doesn't show up on the December report because no activity or balance.
3.100.321	Ministers Sabbatical Fund Balance	Board	General Fund	Originally money reserved for a substitute Minister when our Minister goes on Sabbatical (Yrs 4-7) . Will be used to cover interim ministry expenses in coming years.
3.201.120	CUUPS Support Fund Balance	Debra Neill-Mareci	Donations	For Sacred Oak CUUPS group for ritual expenses and fire circle upkeep
3.202.100	Music Support Fund	Beverly Sanders, Choir President	Donations/Events	For music program expenses not covered by the budgeted line item
3.203.110	Memory Garden Fund	Pete Turner & Tamara Evonne	Donations	For the maintenance of the memory garden. Main expenses are name plates for deceased members and shrub spraying
3.203.120	Courtyard Fund Balance	Peggy Maloney	Donations	Funds remaining from drive to purchase benches and landscaping the courtyard. Funds are used for improvements and long-term maintenance of the courtyard. September expenses: mulching
3.203.130	Solar Panel Fund Balance	Mary Anthony	Donations	Pass through account used for donations for our solar panel project. Money is transferred into our Solar Panel checking account.
3.203.140	Interim Ministry Fund	Mary Anthony	Donations	Donated funds held to help pay salary and expenses of an interim minister.
3.203.150	Labrynth Fund	Debra Neill-Mareci	Donations	Funds to maintain and improve our labyrinth. Money transferred in July from Foundation grant line item per Denis Whittaker & family.
3.204.110	Book Cart Fund	Paul Hargrave	Sales	Book purchase income will be reallocated from this fund into the General Fund at the end of the year.
	<i>Foundation Grants</i>			
3.206.113	Youth Room Update Fund	James Chase	Foundation	Fall 2022 grant to purchase new furniture, etc., for Youth Room
3.206.114	General Assembly Youth Travel	James Chase	Foundation	Spring 2023 grant to help youth travel to GA. Balance to be returned tto Foundation
3.206.140	UU Leadership Fund	LDC	Foundation	The Foundation has provided a \$5000 grant
3.206.141	OWL Fund (Grant) Balance	James Chase	Foundation	OWL training and programs. Two OWL courses began in fall 2023 with one class running through spring 2024.

Unitarian Universalist Fellowship - Gainesville
Consolidated Fund Narrative Report
January 2024

Account #	Account Name	Name	Source	Purpose
	<i>CYREC</i>			
3.210.120	RE Fund Balance	James Chase		To benefit children & youth.
3.210.120	Youth Support Fund Balance	Janese Nix & Mary Bahr	Fundraisers (pancake breakfasts, CON fees, car washes, etc.)	To support Youth Group activities and events
3.210.125	OWL Fund Balance	James Chase	Payments	Funds received to pay for OWL training and classes
3.201.160	Playground/Coffee Fund Balance	James Chase		To support playground equipment and supplies
	<i>Social Justice Fund</i>			
3.216.110	Social Justice Unallocated Funds	Mary Bahr	Directed donations	To cover costs not budgeted for external events, membership fees to other organizations, etc.
3.216.150	Pineridge Fund	Mary Bahr	Directed donations	To pay for Pineridge expenses exclusively.
2.216.160	Share The Plate Balance	Mary Bahr	Directed Donations	These monies are paid out to approved charities.
2.216.220	UU Service Committee Fund Balance	Mary Bahr	Directed Donations	Guest at Your Table collection - benefitting UUSC
	<i>Future Funding & Capital Reserve Accts.</i>			
3.404.110	Res. Fd for Large Scale Maintenance- Balance	Facilities/Board	Board	This account is for large maintenance items (e.g., major fire suppression system repair, air conditioners, roof replacement, exterior painting, etc.)
3.500.100	Land & Building Fund			This is an old assessment of the value of the land and buildings.
3.500.150	Furnishings & Equipment Fund			This is an old value of furnishings and equipment.
3.500.155	Solar Fund Bank Account Balance	Leah Cobb Lee & Mary Anthony	Donations	Money transferred from Solar Panel Fund pass through account to pay for the installation of solar panels. In January, we paid our third installment.
3.500.200	UUFG Foundation Balance	Foundation	Foundation	This number is provided by our Foundation's treasurer, updated as new figures are made available
3.500.201	Foundation Donation Fund Balance			Pass through account to process donations to the Foundation
3.500.250	Ministers Discretionary Fund Bank Acct Bal.	Leah Cobb Lee & Mary Anthony	Donations	This is the balance in the Minister's Discretionary Fund Bank Acct, updated monthly.

Unitarian Universalist Fellowship - Gainesville FL			
Balance Sheet as of January 31, 2024			
Thursday, February 15, 2024			
Account #	Account Name	Beginning Balance	YTD Balance
Assets			
Cash			
1.000.130	Ameris Bank-Checking	92,081.23	181,264.85
1.000.140	Ameris Bank-Money Market	81,074.95	81,385.96
1.000.155	Solar Fund - Checking	0.00	22,235.75
	Total Cash	\$173,156.18	\$284,886.56
Fixed Assets			
1.000.310	Building & Land	1,105,900.00	1,105,900.00
1.000.320	Equipment	62,670.00	62,670.00
	Total Fixed Assets	\$1,168,570.00	\$1,168,570.00
Other Assets			
1.000.410	UUFG Foundation	428,765.57	460,733.99
1.100.250	Ministers Discretionary Fund Account	627.99	319.99
	Total Other Assets	\$429,393.56	\$461,053.98
	Total Assets	\$1,771,119.74	\$1,914,510.54
Liabilities			
Current Liabilities			
2.000.120	Payroll Taxes Payable	5.98	5.98
	Total Current Liabilities	\$5.98	\$5.98
	Total Liabilities	\$5.98	\$5.98
Fund Balance			
3.100.100	General Fund Balance	57,009.24	92,638.08
3.100.321	Minister's Sabbatical Fund Balance	27,908.58	27,908.58
3.201.120	CUUPS Support Fund Balance	431.00	631.00
3.202.100	Music Support Fund	1,087.00	1,087.00
3.203.110	Memory Garden Fund	760.11	553.11
3.203.120	Courtyard Fund Balance	4,215.16	2,545.16
3.203.130	Solar Panel Fund Balance	0.00	14,000.00
3.203.140	Intermim Ministry Fund Balance	5,663.00	49,406.00
3.203.150	Labyrinth Fund Balance	0.00	2,000.00
3.204.110	Book Cart Fund	312.00	728.90
3.206.100	<i>Foundation Grants</i>		
3.206.113	Youth Room Update (Grant) Fund Balance	1,463.36	1,355.87
3.206.114	General Assembly Youth Travel (Grant) Balance	4,188.80	895.45
3.206.115	Banned Books (Grant) Fund Balance	0.00	462.39
3.206.116	Security Camera Grant Balance	0.00	600.00
3.206.140	UU Leadership Fund - Balance	4,519.40	3,619.40
3.206.141	OWL Fund (Grant) Balance	598.07	0.00
3.206.211	Labyrinth Repair (grant) Balance	2,500.00	0.00
	<i>Total Foundation Grants</i>	<i>\$13,269.63</i>	<i>\$6,933.11</i>
3.210.100	<i>CYREC</i>		
3.210.110	RE Fund Balance	2,776.70	3,074.70
3.210.120	Youth Support Fund Balance	1,070.91	1,070.91
3.210.125	OWL Fund Balance	0.00	709.71
3.210.160	Playground/Coffee Fund Balance	95.00	95.00
	<i>Total CYREC</i>	<i>\$3,942.61</i>	<i>\$4,950.32</i>
3.216.100	<i>Social Justice Fund</i>		
3.216.110	Social Justice Unallocated Funds	2,882.72	3,160.25
3.216.150	Pineridge Fund	1,216.98	993.20
3.216.160	Share The Plate Balance	457.60	615.55
	<i>Total Social Justice Fund</i>	<i>\$4,557.30</i>	<i>\$4,769.00</i>
3.400.100	<i>Future Funding & Capital Reserve Accounts Balance</i>		
3.404.110	Res. Fd for Large Scale Maintenance- Balance	53,994.57	53,994.57
	<i>Total Future Funding & Capital Reserve Accounts Balance</i>	<i>\$53,994.57</i>	<i>\$53,994.57</i>
3.500.100	Land & Building Fund	1,105,900.00	1,105,900.00
3.500.150	Furnishings & Equipment Fund	62,670.00	62,670.00
3.500.155	Solar Fund Bank Account Balance	0.00	22,235.75
3.500.200	UUFG Foundation Balance	428,765.57	461,233.99
3.500.250	Ministers Discretionary Fund Bank Account Balance	627.99	319.99
	Total Fund Balance	\$1,771,113.76	\$1,914,504.56
	Total Liabilities and Fund Balance	\$1,771,119.74	\$1,914,510.54

To: Governing Board

From: Cam Pierce

Date: 2/20/2024

RE: Revised Consolidated Fund Report and Revised Balance Sheet for December 2023

During the last two weeks of December, we received donations, but because of check counting issues during the holiday season, we did not actually deposit those donations until January.

After Mary and I sent out the 2023 donation statements, one of our members contacted me in the office. She had given us a check in December for \$10,000 designated for the interim ministry fund. For tax purposes, she wished that donation to be credited in December. Since we did receive her check in December, I updated her giving statement to reflect that.

Consequently, our December consolidated fund report and balance sheet have changed since the December treasurer's report was submitted for the January Governing Board meeting. Please note the changes to line item 3.203.140 on both reports.

Many thanks to our Finance Team for discovering this change!

Please let me know if you have any questions or concerns regarding this update.

Unitarian Universalist Fellowship - Gainesville FL
Consolidated Fund Activity Report for December 2023

Tuesday, February 20, 2024

Account #	Account Name	Beg Balance	Receipts	Disbursements	Transfers/JE's	End Balance
3.100.100	General Fund Balance	79,354.58	20,507.40	21,011.30	0.00	78,850.68
3.100.321	Minister's Sabbatical Fund Balance	27,908.58	0.00	0.00	0.00	27,908.58
3.201.120	CUUPS Support Fund Balance	631.00	0.00	0.00	0.00	631.00
3.202.100	Music Support Fund	1,087.00	0.00	0.00	0.00	1,087.00
3.203.110	Memory Garden Fund	648.11	0.00	0.00	0.00	648.11
3.203.120	Courtyard Fund Balance	2,590.16	0.00	0.00	0.00	2,590.16
3.203.130	Solar Panel Fund Balance	1,442.00	9,900.00	0.00	0.00	11,342.00
3.203.140	Interim Ministry Fund Balance	37,906.00	11,500.00	0.00	0.00	49,406.00
3.203.150	Labyrinth Fund Balance	2,000.00	0.00	0.00	0.00	2,000.00
3.204.110	Book Cart Fund	548.90	180.00	0.00	0.00	728.90
3.206.100	<i>Foundation Grants</i>					
3.206.113	Youth Room Update (Grant) Fund Balance	1,355.87	0.00	0.00	0.00	1,355.87
3.206.114	General Assembly Youth Travel (Grant) Balance	895.45	0.00	0.00	0.00	895.45
3.206.115	Banned Books (Grant) Fund Balance	500.00	0.00	37.61	0.00	462.39
3.206.116	Security Camera Grant Balance	0.00	600.00	0.00	0.00	600.00
3.206.140	UU Leadership Fund - Balance	3,619.40	0.00	0.00	0.00	3,619.40
3.210.100	<i>CYREC</i>					
3.210.110	RE Fund Balance	2,774.70	0.00	0.00	0.00	2,774.70
3.210.120	Youth Support Fund Balance	1,070.91	0.00	0.00	0.00	1,070.91
3.210.125	OWL Fund Balance	999.76	0.00	209.29	0.00	790.47
3.210.160	Playground/Coffee Fund Balance	95.00	0.00	0.00	0.00	95.00
3.216.100	<i>Social Justice Fund</i>					
3.216.110	Social Justice Unallocated Funds	3,082.72	170.00	192.47	0.00	3,060.25
3.216.150	Pineridge Fund	1,216.98	0.00	223.78	0.00	993.20
3.216.160	Share The Plate Balance	651.00	115.00	651.00	0.00	115.00
3.216.220	UU Service Committee Fund Balance	470.23	0.00	470.23	0.00	0.00
3.400.100	<i>Future Funding & Capital Reserve Accounts</i>					
3.404.110	Res. Fd for Large Scale Maintenance-Balance	53,994.57	0.00	0.00	0.00	53,994.57
3.500.100	Land & Building Fund	1,105,900.00	0.00	0.00	0.00	1,105,900.00
3.500.150	Furnishings & Equipment Fund	62,670.00	0.00	0.00	0.00	62,670.00
3.500.155	Solar Fund Bank Account Balance	65,325.75	11,342.00	18,144.00	0.00	58,523.75
3.500.200	UUFG Foundation Balance	414,446.96	0.00	0.00	0.00	414,446.96
3.500.250	Ministers Discretionary Fund Bank Account Balance	321.99	0.00	2.00	0.00	319.99
	Total	\$1,873,507.62	\$54,314.40	\$40,941.68	\$0.00	\$1,886,880.34

Unitarian Universalist Fellowship - Gainesville FL			
Balance Sheet as of December 31, 2023			
Tuesday, February 20, 2024			
Account #	Account Name	Beginning Balance	YTD Balance
Assets			
Cash			
1.000.130	Ameris Bank-Checking	92,081.23	164,374.28
1.000.140	Ameris Bank-Money Market	81,074.95	81,341.04
1.000.155	Solar Fund - Checking	0.00	58,523.75
	Total Cash	\$173,156.18	\$304,239.07
Fixed Assets			
1.000.310	Building & Land	1,105,900.00	1,105,900.00
1.000.320	Equipment	62,670.00	62,670.00
	Total Fixed Assets	\$1,168,570.00	\$1,168,570.00
Other Assets			
1.000.410	UUFG Foundation	428,765.57	414,446.96
1.100.250	Ministers Discretionary Fund Account	627.99	319.99
	Total Other Assets	\$429,393.56	\$414,766.95
	Total Assets	\$1,771,119.74	\$1,887,576.02
Liabilities			
Current Liabilities			
2.000.120	Payroll Taxes Payable	5.98	695.68
	Total Current Liabilities	\$5.98	\$695.68
	Total Liabilities	\$5.98	\$695.68
Fund Balance			
3.100.100	General Fund Balance	57,009.24	78,850.68
3.100.321	Minister's Sabbatical Fund Balance	27,908.58	27,908.58
3.201.120	CUUPS Support Fund Balance	431.00	631.00
3.202.100	Music Support Fund	1,087.00	1,087.00
3.203.110	Memory Garden Fund	760.11	648.11
3.203.120	Courtyard Fund Balance	4,215.16	2,590.16
3.203.130	Solar Panel Fund Balance	0.00	11,342.00
3.203.140	Intermim Ministry Fund Balance	5,663.00	49,406.00
3.203.150	Labyrinth Fund Balance	0.00	2,000.00
3.204.110	Book Cart Fund	312.00	728.90
3.206.100	<i>Foundation Grants</i>		
3.206.113	Youth Room Update (Grant) Fund Balance	1,463.36	1,355.87
3.206.114	General Assembly Youth Travel (Grant) Balance	4,188.80	895.45
3.206.115	Banned Books (Grant) Fund Balance	0.00	462.39
3.206.116	Security Camera Grant Balance	0.00	600.00
3.206.140	UU Leadership Fund - Balance	4,519.40	3,619.40
3.206.141	OWL Fund (Grant) Balance	598.07	0.00
3.206.211	Labyrinth Repair (grant) Balance	2,500.00	0.00
	<i>Total Foundation Grants</i>	<i>\$13,269.63</i>	<i>\$6,933.11</i>
3.210.100	<i>CYREC</i>		
3.210.110	RE Fund Balance	2,776.70	2,774.70
3.210.120	Youth Support Fund Balance	1,070.91	1,070.91
3.210.125	OWL Fund Balance	0.00	790.47
3.210.160	Playground/Coffee Fund Balance	95.00	95.00
	<i>Total CYREC</i>	<i>\$3,942.61</i>	<i>\$4,731.08</i>
3.216.100	<i>Social Justice Fund</i>		
3.216.110	Social Justice Unallocated Funds	2,882.72	3,060.25
3.216.150	Pineridge Fund	1,216.98	993.20
3.216.160	Share The Plate Balance	457.60	115.00
	<i>Total Social Justice Fund</i>	<i>\$4,557.30</i>	<i>\$4,168.45</i>
3.400.100	<i>Future Funding & Capital Reserve Accounts Balance</i>		
3.404.110	Res. Fd for Large Scale Maintenance- Balance	53,994.57	53,994.57
	<i>Total Future Funding & Capital Reserve Accounts Balance</i>	<i>\$53,994.57</i>	<i>\$53,994.57</i>
3.500.100	Land & Building Fund	1,105,900.00	1,105,900.00
3.500.150	Furnishings & Equipment Fund	62,670.00	62,670.00
3.500.155	Solar Fund Bank Account Balance	0.00	58,523.75
3.500.200	UUFG Foundation Balance	428,765.57	414,446.96
3.500.250	Ministers Discretionary Fund Bank Account Balance	627.99	319.99
	Total Fund Balance	\$1,771,113.76	\$1,886,880.34
	Total Liabilities and Fund Balance	\$1,771,119.74	\$1,887,576.02

Report on the Fellowship Council – Monthly Meeting (February 13, 2024 – 7:00 to 8:30pm) Unitarian Universalist Fellowship of Gainesville, Florida

Meeting opened at 7:00pm with facilitator: Michael Hazlett, Governing Board Vice President. Members Present: Liz Stewart (Worship Team); Beverly Sanders (Choir Circle); Jonathon Coron (Safety Committee); Pat Caren (Social Justice- Family Promise); David Wilkomm (Safety Committee) The total number in attendance was eight (6). Meeting Opened with a Chalice lighting and reading.

We light this chalice remembering the freedoms long established in our nation: freedom of speech; freedom of the press; freedom from the establishment of religion. We light this chalice honoring those who exemplify protecting those freedoms: librarians, booksellers; teachers; authors; journalists. We light this chalice, so that by its light we may read *all* the books: books with archaic language; books with offensive material; books which affirm the diversity of the human race; books which normalize our varied sexualities; books which share multidimensional perspectives of history. May we bask in the glow of its light this morning as we illuminate, brighten, and radiate because of the books we have read and the books we have yet to read. (Author: [Julie Conrady](#))

Michael Hazlett again requested monthly reports from Fellowship Council committees send all reports can be collated and forwarded the UUFG Office Administrator and UUFG Governing Board. Monthly committee reports will help apprise the Governing Board of the see types of activities and collaboration needed at the fellowship. Each committee reporting should share successes, needs and plans for the future.

As during the previous month, round table discussion covered a wide range of issues.

Michael Hazlett wished to encourage wider participation in Fellowship Council. Some additional recruitment of members to various committees included: Choir Participation; Communications (need chair); Facilities; Hospitality (need chair); Membership; Safety Committee; and Worship Team. Discussion about recruitment for members to be in committees varied. Michael volunteered for the Board to encourage more participation. Michael Hazlett led a review of recent and upcoming Fellowship wide activities and encouraged participation in and contributions to the upcoming rummage sale – February 24th. Mike Hazlett also presented an overview of the Stewardship Campaign for 2024/2025 – using the theme of all of us Rowing the UUFG Boat toward our goal of a Full Time Interim Minister. Sandra Topp has been coordinating stewardship with the assistance of Judi Oltmans, Evan Waldt, Judith Kendall, and Mike Hazlett (Board Liaison). The new time and talent sheet and the Pledge Form are presented in **Attachment A** and are in the final revision stage. The Stewardship Campaign will begin on February 25th with a Town Hall Meeting on the Fellowships financial situation. During each Sunday in March there will be Moments for Stewardship – leading to Pledge Sunday on March 24th - followed by a luncheon sponsored by the Stewardship team.

Beverly Sanders, for Choir and Music Program, reported that our current Pianist (Tane' DeKrey) has done an excellent job directing the choir. Kirsten Flamand has also stepped up to help with other music related duties during worship – filling in during the vacancy of the Music Director. Kirsten Flamand is continuing to seek members who have varying degrees of talent in singing or musical instrument proficiency.

Safety Committee Chair (Jonathan Coron) presented a summary of their activities. Other activities including Conflict Resolution Training needed for Safety Team members and monitors. The safety committee report (Jonathan) and worship (Liz) reports have continued a discussion about safely managing visitors while supporting and welcoming them and not allowing disruption of services. It was noted that an additional AED device is needed, collaboration with the Jewish community, and the concern over visitor backpacks is of some concern. See Safety Report in **Attachment B**.

Social Justice Circle indicated a continuation in a number of areas including: the Solar update for the Fellowship; UUFG Volunteers at Grace Market Place; Participation in Family Promise activities with Westminster Presbyterian Church; continued support for the Palestinian-Gaza Cease Fire Resolution; Food for Kids Backpack program; and continuation of discussions on “Critical Race Theory” and the “1619 Project”; Share the Plate with the Florida Restoration of Rights Coalition; and the Unbanning Books Monthly kickoff March 11th.

The Worship Committee submitted a report for the month – found in **Attachment C**. Carrying out weekly worship continues to be an ongoing effort by Liz Stuart and the Worship Team. Those attending Fellowship Council expressed their gratitude for Liz and others on the Worship Team for their significant efforts in the absence of a full-time pastor. Worship Chair Liz Stewart reported her relief and gratitude that many people have stepped up to help with leading or participating in services. The service schedule is filled up through March and into April. Liz Stewart also submitted the revised Worship Committee Charter for the Governing Boards review, first reading and possible revision and final approval – See **Attachment D** for this revised Charter.

As an additional item for review, Jonathon Coron shared his development of: “Some Essential Beliefs Shared by Many Unitarian Universalists”. This is a word recognition game to find the imbedded concept on a word matrix. He suggested that this could be helpful to members and visitors alike. – perhaps at the Visitors or Welcome Tables. This is being provided to the Board for their review and possible use in the Fellowship – please refer to **Attachment E**.

Another item of consideration is a Survey for Members Who No Longer Attend – developed by David Wilkomm, and Steve and Elise Atlas. The intent of the survey is to assess the reasons why members have not returned to the Fellowship. The instrument also would explore areas that UUFG may consider changing in it’s approach to programs and worship. David, Steve and Elise wished to share this with the Board for their review and possible use by the Membership Committee – please refer to **Attachment F**.

Finally, there are three action items for Board Consideration.

- 1. Review and Reading of the revised Worship Committee Charter (Attachment D).**
- 2. The review of the “Some Essential Beliefs Shared by Many Unitarian Universalists (see Attachment E).**
- 3. Consider the concept of a Survey for Members Who No Longer Attend (Attachment F).**

The next meeting of the Fellowship Council is scheduled for Tuesday, March 12th at 7:00 pm (via Zoom). An agenda and notifications will be forward in the first week of March for our next meeting. The Fellowship Council meeting closed at 8:30pm with the extinguishing of the chalice and final reading. Submitted by Michael Hazlett, Governing Board Vice President and Fellowship Council Facilitator.

Respectfully Submitted by

Michael Hazlett
Governing Board Vice President
and Fellowship Council Facilitator

Attachment A



Unitarian Universalist Fellowship of Gainesville Florida

Time and Talent Tasks and Areas of Service (2024/25)

Part of our Fellowship Covenant and Interconnectedness

Name: _____

Phone: _____ Email: _____

Realizing that all of our abilities, talents and participation are part of our covenant with UUFG, I would like to help by pledging my time and talent by serving (or by participating) in the following ways in 2023-2024. Your choices will only be shared with Committee Chairs and the Fellowship leadership. (Please circle the number of the activity for which you would like to volunteer or participate in each area of service.)

Building and Grounds (Facilities): Responsible for the maintenance and improvements to the buildings and grounds.

1. Sparkle Saturday Cleanup on 2nd Saturday: lawn care, leaf blowing, invasive plant removal, tree trimming, pressure washing, picking up branches and litter etc.
2. Assist with basic building maintenance: plumbing, painting, light carpentry, furniture repair, etc.
3. Assist with maintenance of the Stone Labyrinth, fire circle, playground and/or Memory Garden.
4. Assist with storage management (sheds and closets) and clutter control.
5. Other (Specify) _____

Choir Circle and Music Program: Involves all aspects of Choral and Music Performance as part of Worship.

1. Would like to Join the Choir Circle or Sing in the UUFG Choir.
2. I would like to learn a musical instrument or read music (Specify Instrument _____)
3. I sang in school choirs and would like to sing in the Choir at UUFG
4. I played an instrument in school and would like to help with instrumental performances at UUFG
5. I would like to sing in a group or be a possible soloist.
6. Other (Specify) _____

Congregational Care Team: Responsible for the care and comfort of Fellowship members and friends of UUFG.

1. Visitation and phone calls to members who are ill, or can't come to church—or would just like a visit or call.
2. Send out Greeting cards—Get Well, Graduation, Birthday, events, etc.
3. Help with receptions, special dinners—when needed—Food, set-up, etc.
4. Transportation to church, appointments, to get groceries, etc.
5. Serve on Right Relations (RELATE) Committee
6. Other (Specify) _____

Hospitality Cohort: To promote community at UUFG, for members, friends and visitors, through facilitating the sharing of food and conversation in a welcoming atmosphere.

1. Would serve on the Hospitality Committee.
2. Help with arranging, and serving, coffee and refreshments during social hour.
3. Help load dishes and clean up after coffee hour.
4. Help with Thanksgiving, Christmas Eve and other receptions.
5. Assist the Kitchen Steward with kitchen restocking and kitchen cleaning.
6. Recruit helpers for coffee hour and special event setup and cleanup.
7. Help plan and/or coordinate theme dinners, raffles or other fundraising events.
8. Other (Specify) _____

Please continue on to the back of this Page

(Page 3)

Membership Committee: Welcoming, helping and integrating visitors into the congregation. Helping current members.

1. Willing to Serve on the Membership Committee.
2. Serve as Greeter or at Welcome Table before, or Visitors Table after, Sunday Service
3. Managing pamphlets at Welcome and Visitors Tables
4. Provide opportunities for new members to learn about the Fellowship.
5. Assist with orientation classes for potential members and with new member recognition.
6. Assist in identifying members who need help, referring them to the Care Committee.
7. Other (Specify) _____

Religious Education: Responsible for the Sunday Education and other education functions at the Fellowship.

1. Nursery Volunteer, Religious Education Teacher or Substitute
2. Serve on Children & Youth Religious Education Committee (CYREC)
3. Teach in the OWL program (Our Whole Lives – Relationships, Anatomy and Sex Education).
4. Help with Youth Group or Young Adult Group at UUFG (Age Range _____)
5. Would like to assist the Director of Life Span Faith Development in Educational Programs at UUFG.
6. Participate in camps, retreats and conferences offered by the UUA Regional and National Level
7. Other (Specify) _____

Safety Team: To provide for the safety of the congregation, minister, staff and the security of the Fellowship.

1. Serve as a Safety Committee Member
2. Serve as a Foyer or Religious Education Monitor during Sunday worship.
3. Assist safety drills held in the Fellowship.
4. Assist in UUFG education on safety that address fire, medical, weather and civil disturbance
5. Help with the annual review and update of the Emergency Operations Plan (EOP).
6. Other (Specify) _____

Social Justice Council: Social Justice and outreach *programs supported by UUFG, expanding our voice for justice in Gainesville and the larger world.*

1. Become involved in UUFG's Council and Social Justice Circle
2. Help Advocate for Climate and Environmental Justice, Immigration Reform and for Dreamers (DOCA)
3. Assist with EarthKeepers Project so UUFG Maintains in Green Congregational Status with UUA.
4. Assist with the Democracy Project, Citizen Education, Get out the Vote Activities and Petition Signing.
5. Help with Pineridge Neighborhood Youth Outreach or with Family Promise Hosting
6. Participate in Race Equality and Anti Racism Activities, and Promote LGBTQ+ Activities.
7. Assist Local Food Bank (Bread of the Mighty) and Grace Market Place Homeless Center
8. Other (Specify) _____

Worship Team: Responsibilities of this committee are to provide worship in keeping with UU values, under coordination of the Pastor and/or the Governing Board of UUFG.

1. Volunteer as a lay worship associate.
2. Volunteer as an Usher during, Sunday Service
3. Serve as a Sunday lock-up crew after service and coffee hour.
4. Join Worship Circle and assist in worship theme selection and budget development.
5. Help with Tech Issues during Worship (mics, loop hearing system, slides, etc.)
6. Other (Specify) _____

UUFG Board Affiliated Committees and Service Roles with Staff: These service opportunities deal with administration and leadership roles of the Fellowship.

1. Volunteer in the UUFG Office (Group Listservs, Office Assistance or Mailings)
2. Assist with technology (staff hardware, software or networking issues).
3. Serve on Stewardship Committee (organizing and presenting requests for time, talent and resources).
4. Serve on Finance Committee (developments Annual Budget presented to the Fellowship).
5. Serve on Communications Committee (advertising and outreach to the community)
6. Serve on the UUFG Personnel Committee (oversee staff hiring recommendations).
7. Serve on the UUFG Foundation (oversees endowment & considers requests to use endowment funds).
8. Serve on the Leadership Development Council (LDC) that helps recruit and train leaders at UUFG.
9. Serve as a member of the UUFG Governing Board

THANK YOU FOR YOUR HELP. There will be a basket at the back of the Sanctuary for you to place your "Time and Talent" form.

Annual Giving Campaign for 2024-2025
Unitarian Universalist Fellowship of Gainesville, Florida

I/We pledge a monthly total of \$_____ (or \$_____ *Annually*) for the Unitarian Universalist Fellowship of Gainesville’s fiscal year: July 1, 2024 to June 30, 2025)

Name(s): _____

Address: _____ City: _____ State: _____ Zip: _____

Telephone(s): _____

E-mail(s): _____

Signature: _____ Date: _____

I/We are pledging to fulfill our covenant electronic as members of UUFG.

I would like information about using Transfers.

I/We are pledging as Supporting Friends

I would like information about will/estate giving

SUGGESTED MONTHLY GIVING AMOUNT PLEDGED TO UUFG – FOR FISCAL YEAR 2024/25

Annual Income After Taxes	3 percent Monthly	4 percent Monthly	5 percent Monthly	6 percent Monthly	7 percent Monthly	8 percent Monthly	9 percent Monthly	10 percent Monthly
\$10,000	\$25.00	\$33.33	\$41.67	\$50.00	\$58.33	\$66.67	\$75.00	\$83.33
\$20,000	\$50.00	\$66.67	\$83.33	\$100.00	\$116.67	\$133.33	\$150.00	\$166.67
\$30,000	\$75.00	\$100.00	\$125.00	\$150.00	\$175.00	\$200.00	\$225.00	\$250.00
\$40,000	\$100.00	\$133.33	\$166.67	\$200.00	\$233.33	\$266.67	\$300.00	\$333.33
\$50,000	\$125.00	\$166.67	\$208.33	\$250.00	\$291.67	\$333.33	\$375.00	\$416.67
\$60,000	\$150.00	\$200.00	\$250.00	\$300.00	\$350.00	\$400.00	\$450.00	\$500.00
\$70,000	\$175.00	\$233.33	\$291.67	\$350.00	\$408.33	\$466.67	\$525.00	\$583.33
\$80,000	\$200.00	\$266.67	\$333.33	\$400.00	\$466.67	\$533.33	\$600.00	\$666.67
\$90,000	\$225.00	\$300.00	\$375.00	\$450.00	\$525.00	\$600.00	\$675.00	\$750.00
\$100,000	\$250.00	\$333.33	\$416.67	\$500.00	\$583.33	\$666.67	\$750.00	\$833.33
\$110,000	\$275.00	\$366.67	\$458.33	\$550.00	\$641.67	\$733.33	\$825.00	\$916.67
\$120,000	\$300.00	\$400.00	\$500.00	\$600.00	\$700.00	\$800.00	\$900.00	\$1,000.00
\$130,000	\$325.00	\$433.33	\$541.67	\$650.00	\$758.33	\$866.67	\$975.00	\$1,083.33
\$140,000	\$350.00	\$466.67	\$583.33	\$700.00	\$816.67	\$933.33	\$1,050.00	\$1,166.67
\$150,000	\$375.00	\$500.00	\$625.00	\$750.00	\$875.00	\$1,000.00	\$1,125.00	\$1,250.00
\$160,000	\$400.00	\$533.33	\$666.67	\$800.00	\$933.33	\$1,066.67	\$1,200.00	\$1,333.33
\$170,000	\$425.00	\$566.67	\$708.33	\$850.00	\$991.67	\$1,133.33	\$1,275.00	\$1,416.67
\$180,000	\$450.00	\$600.00	\$750.00	\$900.00	\$1,050.00	\$1,200.00	\$1,350.00	\$1,500.00
\$190,000	\$475.00	\$633.33	\$791.67	\$950.00	\$1,108.33	\$1,266.67	\$1,425.00	\$1,583.33
\$200,000	\$500.00	\$666.67	\$833.33	\$1,000.00	\$1,166.67	\$1,333.33	\$1,500.00	\$1,666.67
\$210,000	\$525.00	\$700.00	\$875.00	\$1,050.00	\$1,225.00	\$1,400.00	\$1,575.00	\$1,750.00
\$220,000	\$550.00	\$733.33	\$916.67	\$1,100.00	\$1,283.33	\$1,466.67	\$1,650.00	\$1,833.33
\$230,000	\$575.00	\$766.67	\$958.33	\$1,150.00	\$1,341.67	\$1,533.33	\$1,725.00	\$1,916.67
\$240,000	\$600.00	\$800.00	\$1,000.00	\$1,200.00	\$1,400.00	\$1,600.00	\$1,800.00	\$2,000.00
\$250,000	\$625.00	\$833.33	\$1,041.67	\$1,250.00	\$1,458.33	\$1,666.67	\$1,875.00	\$2,083.33

Suggested Annual Giving Levels are found on the Back of this Pledge Form

Continued from front Page

SUGGESTED ANNUAL GIVING AMOUNT PLEDGED TO UUGF – FOR FISCAL YEAR 2024/25

Annual Income After Taxes	3 percent Annually	4 percent Annually	5 percent Annually	6 percent Annually	7 percent Annually	8 percent Annually	9 percent Annually	10 percent Annually
\$10,000	\$300.00	\$400.00	\$500.00	\$600.00	\$700.00	\$800.00	\$900.00	\$1,000.00
\$20,000	\$600.00	\$800.00	\$1,000.00	\$1,200.00	\$1,400.00	\$1,600.00	\$1,800.00	\$2,000.00
\$30,000	\$900.00	\$1,200.00	\$1,500.00	\$1,800.00	\$2,100.00	\$2,400.00	\$2,700.00	\$3,000.00
\$40,000	\$1,200.00	\$1,600.00	\$2,000.00	\$2,400.00	\$2,800.00	\$3,200.00	\$3,600.00	\$4,000.00
\$50,000	\$1,500.00	\$2,000.00	\$2,500.00	\$3,000.00	\$3,500.00	\$4,000.00	\$4,500.00	\$5,000.00
\$60,000	\$1,800.00	\$2,400.00	\$3,000.00	\$3,600.00	\$4,200.00	\$4,800.00	\$5,400.00	\$6,000.00
\$70,000	\$2,100.00	\$2,800.00	\$3,500.00	\$4,200.00	\$4,900.00	\$5,600.00	\$6,300.00	\$7,000.00
\$80,000	\$2,400.00	\$3,200.00	\$4,000.00	\$4,800.00	\$5,600.00	\$6,400.00	\$7,200.00	\$8,000.00
\$90,000	\$2,700.00	\$3,600.00	\$4,500.00	\$5,400.00	\$6,300.00	\$7,200.00	\$8,100.00	\$9,000.00
\$100,000	\$3,000.00	\$4,000.00	\$5,000.00	\$6,000.00	\$7,000.00	\$8,000.00	\$9,000.00	\$10,000.00
\$110,000	\$3,300.00	\$4,400.00	\$5,500.00	\$6,600.00	\$7,700.00	\$8,800.00	\$9,900.00	\$11,000.00
\$120,000	\$3,600.00	\$4,800.00	\$6,000.00	\$7,200.00	\$8,400.00	\$9,600.00	\$10,800.00	\$12,000.00
\$130,000	\$3,900.00	\$5,200.00	\$6,500.00	\$7,800.00	\$9,100.00	\$10,400.00	\$11,700.00	\$13,000.00
\$140,000	\$4,200.00	\$5,600.00	\$7,000.00	\$8,400.00	\$9,800.00	\$11,200.00	\$12,600.00	\$14,000.00
\$150,000	\$4,500.00	\$6,000.00	\$7,500.00	\$9,000.00	\$10,500.00	\$12,000.00	\$13,500.00	\$15,000.00
\$160,000	\$4,800.00	\$6,400.00	\$8,000.00	\$9,600.00	\$11,200.00	\$12,800.00	\$14,400.00	\$16,000.00
\$170,000	\$5,100.00	\$6,800.00	\$8,500.00	\$10,200.00	\$11,900.00	\$13,600.00	\$15,300.00	\$17,000.00
\$180,000	\$5,400.00	\$7,200.00	\$9,000.00	\$10,800.00	\$12,600.00	\$14,400.00	\$16,200.00	\$18,000.00
\$190,000	\$5,700.00	\$7,600.00	\$9,500.00	\$11,400.00	\$13,300.00	\$15,200.00	\$17,100.00	\$19,000.00
\$200,000	\$6,000.00	\$8,000.00	\$10,000.00	\$12,000.00	\$14,000.00	\$16,000.00	\$18,000.00	\$20,000.00
\$210,000	\$6,300.00	\$8,400.00	\$10,500.00	\$12,600.00	\$14,700.00	\$16,800.00	\$18,900.00	\$21,000.00
\$220,000	\$6,600.00	\$8,800.00	\$11,000.00	\$13,200.00	\$15,400.00	\$17,600.00	\$19,800.00	\$22,000.00
\$230,000	\$6,900.00	\$9,200.00	\$11,500.00	\$13,800.00	\$16,100.00	\$18,400.00	\$20,700.00	\$23,000.00
\$240,000	\$7,200.00	\$9,600.00	\$12,000.00	\$14,400.00	\$16,800.00	\$19,200.00	\$21,600.00	\$24,000.00
\$250,000	\$7,500.00	\$10,000.00	\$12,500.00	\$15,000.00	\$17,500.00	\$20,000.00	\$22,500.00	\$25,000.00

PLEASE THOUGHTFULLY COMPLETE YOUR PLEDGE AMOUNT ON THE FRONT OF THIS FORM (Monthly or Annually) AND RETURN YOUR PLEDGE FORM DURING THE DEDICATION SUNDAY (March 25th) DURING THE SERVICE, OR RETURN THE FORM TO THE UUGF FELLOWSHIP ADMINISTRATOR (c/o Cam Pierce, UUGF, 4225 NW 34th St., Gainesville, FL 32605).



Attachment B



SAFETY TEAM MEETING NOTES

February 13, 2024

In attendance: Cam Pierce, David Willkomm, Jonathan Coron and Ben Lee

Meeting summary notes by: Jonathan Coron, Safety Team Chair

CC: Members of the Safety Team, UUFG Board and Facility Administrator

Cam mentioned that all Listservs were being updated. This will make communications more efficient.

Ben mentioned that he is organizing the Girl Scout cookies this year for their local troop. Perhaps members are interested in buying some? I mention this as I recently read that the Girl Scouts, as an organization, supports both trans and LGBTQ+ populations.

We discussed the need for a “No parking overnight” sign. One might be OK but it was felt that it probably was not needed as it is very infrequent that people use our parking areas overnight. Evidently, Reverend Christy did permit a Trans woman to stay overnight for a number of days. She was eventually told not to do it anymore and she did not. There was a feeling that such a sign would also not be welcoming to members and visitors on Sundays.

Jonathan was called by Jim Wright of the Finance Committee to say that the Safety Team’s budget for the upcoming fiscal year would be around \$300 as it was for this year. Jonathan mentioned that he hoped that there would not be any additional funds needed for some unforeseen items. Cam mentioned the possible funding of training that would involve costs. Update: Jim emailed Jonathan with what will be a recommendation to increase the team’s budget to around \$700.

Jonathan had attended with his wife an amazingly inspiring talk given by a woman who is one of the last survivors of the Auschwitz Death Camp. The talk took place at the Chabad UF Jewish Student Center that is located across the street on University Avenue. At 95, Irene Zisblatt spoke for 1 ½ hours without a break. Her insights and stories were inspiring along with several other emotions. Jonathan brought this up as he had spoken to Rabbi Goldman before the event got started. He mentioned that he was the chair of the Safety Team at UUFG and that he would be scanning the audience while the event was going on as this is something he often does. Jonathan was wearing his fanny pack and the Rabbi asked if Jonathan was armed. Jonathan was not and does not own or carry a gun at any time. The center hired off-duty police officers to help protect the attendees of

the event. The cost of such enforcement personnel is \$60 per hour for a minimum of three hours . Note that Bnai Brith and Shir Shalom facilities in town both hire police personnel for each of their Saturday services.

Cam mentioned that our AED device will need a new battery this year as well as required replacement of pads for use with the machine. The cost of around \$280 will use up most of our budget. Again, the possible increase of the current \$300 to around \$700 can greatly assist in the purchase of additional items or training should they become needed.

Cam mentioned that 5-6 rooms of the facility are often used after the Sunday service and coffee time has been completed. This is important to know as the Safety Team needs to be made aware that other things are going on. There may be a need for a member of the team to assist during these times. The issue will be addressed. We discussed that team members do not want to be “burned out” from taking on too many duties.

Jonathan spoke with Marilyn Roberts about security related issues to the upcoming rummage sale. As the event is open to the public, there may well be a need for the presence of one or more safety team members. It was mentioned by Marilyn that there would be a large number of UU members at the event. The front doors will be open for the entire event that runs between 8 and 12 or 8 and 1 depending on number of people who are still coming in. Will the UUG members be wearing our yellow T-shirts?

Gene Cowell, one of the team members has recently had a serious injury. He appears to be doing well and is now home from the hospital. The team members are encouraged to keep up with him to determine his progress. The Care Team are aware of his situation and have provided assistance when needed.

The Gazette will have the upcoming Foyer and RE monitor schedule. David said the schedule is fluid as there is a structure to the calendar (such as Jonathan is assigned every first Sunday to do Foyer monitor) but certain factors will necessitate the altering of the schedule. Overall, we have done well in covering the needed positions but are always looking for more members to assist. David shares our coverage schedule with the Worship Team.

Allowing non-members to bring in backpacks and other storage devices was discussed. Currently, it will be left to the assessment of the Foyer Monitor as to whether the visitor can bring in their storage container or if they should bring it back to their car. Some of the team were split on this decision and a firm policy will likely be created for the upcoming EOP revisions for this year.

There was a “No Gun Allowed” sign put up without the knowledge of others. It stayed up in the middle of the glass between the entrance doors to the sanctuary for months. The sign disappeared at some point. The team decided that the board should decide as to whether a new sign should be put up.

Cam brought to the meeting the “Thank You card” that Erin had written on behalf of the board. The card was read aloud and the team appreciated the recognition. We have a great team that is highly dedicated to the safety of the congregation, staff and visitors.

Cam mentioned that the solar project would be starting on the 14th. Materials will NOT be locked by the solar company while they are working on the premises. Cam thought that perhaps a security camera should be placed over the area on the north side of the building where the controls will be located when the project is completed. Perhaps #2, should controls have a shed or something else built around the controls? This issue will need to be revisited when more is known.

David mentioned the breaker box that is located at the back of the kitchen. The controls are open to anyone at this time. Most kitchen volunteers seem to know how to restart the system and all security staff need to be fully aware of how to reset it as well. Do members of other groups know how what to do when electrical problems occur?

Cam reminded us that there is a Foundation grant for the purchase of security cameras. The funds must be used prior to June 30th. Jonathan will talk with Joe to remind him of the issue. The board had concerns about how the videos would be stored. The two options are in “the cloud” and at the fellowship. More research needs to be done about this.

Next meeting will be on **March 19th** as Cam will not be available to attend the earlier date and his presence is essential to the group’s effectiveness.

Attachment C

Worship Associates Activity Report

February 13, 2024

The Wonderful Worship Team continues to rise above all obstacles and create in-person, lively, musical, interactive Sunday morning services. New/continued developments:

- Our Wonderful Worship Associates are taking on more responsibility for the actual Sunday services and performing at a very high level
- Introduction of the QR code in the services for collection of donations happened 04/11/2024
- Jim Benedict is working diligently and making progress in assessing and improving our sound system
- Kirsten Flamand continues to augment services with outstanding Sanctuary decor. She is also doing a wonderful job as acting music director
- Tane' DeKrey is doing a superb job as choir director
- The drumming service with Leon Larsen and the Lost Safari Drummers went over very well. Half a dozen folks attended a workshop following the service
- At the moment, every service save one is booked through the month of March, and there has been one member who has asked to do a sermon, and one member who suggested a speaker who came highly recommended after a talk at the Florida Free Speech Forum

Respectfully submitted,
Liz Stewart, Worship Chair

Attachment D

CHARTER

Worship Associate Team

Approved:

1. Purpose:

The Worship Associates, in conjunction with the minister, Choir Circle, Tech Team and the administrative staff, organize, plan and execute the weekly Sunday worship services.

2. Committee Members & Leadership:

Minister, Worship Chair, Worship Associates, Choir Circle, Tech Team, Director of Life Span Faith Development

3. Meetings:

The committee meets the first Tuesday of each month via Zoom at 6:30 p.m. Non-members would be welcome to attend.

4. Responsibilities:

Schedule Worship Associates to cover each Sunday service. Work with the minister and/or guest speaker to prepare the Order of Service for each Sunday. Write and/or gather necessary readings, stories, chalice lighting/extinguishing words. Work with the Choir Circle to select hymns and other music. Ensure delivery of necessary slides to the Tech Team in a timely manner. Prepare the sanctuary for Sunday service. Conduct the service with the minister and/or guest speaker.

5. Annual Budget: As assigned by the Board

6. Annual goals for 2023-2024:

Fill the pulpit every Sunday by providing exceptional lay-led and contract services. Collaborate with the Sound Team to continue to improve the quality of sound in the sanctuary.

As of 02/2024 the following are the individuals involved:

Worship Associates: Liz Stewart, Chair; Carol Stiles (representing Valdosta), Mary Anthony, Elise Atlas, Steve Atlas, Sue Boone, Susan Christy, Anna Deyle, Sarah Hausman, Erin Parish, Jeff Stevens, Evan Waldt

Choir Circle: Tane' DeKrey, Choir Director; Kirsten Flamand, Acting Music Director; Bev Sanders, Choir President

Tech Team: Erin Parish, Ricardo Sosa-Melo

Director of Life Span Development: James Chase

Attachment E

Some essential beliefs shared by many Unitarian Universalists

For the many folks who know their own beliefs or are exploring others

Jonathan Coron 2023

Introduction: *To some Unitarian Universalists and to others who are not UU's, beliefs are a big challenge. Questions of faith and of our personal beliefs can keep us seeking, yet they can become the foundation of how we interact with each other, in our community and beyond. After all, what we believe in can be a huge journey for many of us and those beliefs are likely to change in the course of our lives. Below are sentences that contain some essential beliefs held by many Unitarian Universalists. These beliefs were summarized from The Unitarian Universalist Pocket Guide by Harry B. Scholefield.*

Instructions: *Read each sentence and think about what is being said. Do you believe it? Whether you do or not, certain words have been bolded and underlined and found on the back of this page. Words are hidden horizontally, vertically, diagonally, and in reverse. Other words have been hidden as well. Can you find them?*

The inherent **worth** and **dignity** of **every** person. **Justice, equity** and **compassion** in human relations. **Acceptance** of one another and **encouragement** to **spiritual growth** in our congregations. A **free** and **responsible search** for **truth** and **meaning**. The right of **conscience** and the use of the **democratic** process within our congregations and society.

The goal of **world community** with **peace, liberty** and justice for all. Respect for the **interdependent web** of all **existence** of which we are a part. The **freedom** of religious **expression** by all people. **Everyone** should be **encouraged** to develop their own individual theology and to be able to present their religious **opinions** and ideas **without fear** of punishment of any type.

The **tolerance** of **differing** religious ideas and that all religions have something of **value** to **teach** everyone who will **listen**. The authority of **reason** and conscience and that the ultimate **arbiter** in religion is not any document, official or church but is solely based on the **choices** and **decisions** of the **individual**.

The **open minded** search for truth with the **understanding** that there is no limitation to the revelations that can be discovered. The **unity** of **experience** for there is not real conflict between **faith** and **knowledge**, religion and the world as well as the **sacred** and the **secular**. Each person has an **equal** claim to life, **liberty** and justice. There is no **idea, ideal** or **philosophy** that is superior to even one human life.

The **ethical** application of religion. **Inner grace** and faith is completed in **social** and **community** involvement. The force of **love** provides the governing **principle** in human **relationships**, which seeks to **help** and to **heal**, never to hurt or destroy.

The necessity for democratic processes. Having **open** organizational records, open elections to members, ideas that are open to criticism so that people may govern **themselves**. The importance of religious community where our peers **confirm** and validate experience and provide a critical platform as well as a **network** of **mutual** support. Version 111523

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ATTACHMENT F**DAVID C SR WILLKOMM**

Tue, Jan 23, 1:43 PM

to me, Steve

Reply

Hi Mike,

Elise & Steve Atlas have been working with me on formulating a questionnaire, to help better understand the effectiveness in retaining and gaining new members. The couple has a background in doing research in collecting this type of data.

We would like some UUFG officials to review this survey instrument and advise on how we may proceed.

1) What prompted you to attend Gainesville Unitarian Universalist services ? Check all that apply

- A. UUFG Website information
- B. Minister Contact
- C. Members outreach to you
- D. Other reasons please give details

2) What did you like about your experience at UUFG. Circle all that apply

- A. Sunday sermon message
- B. Sunday service Music
- C. Children's program
- D. conversations with others
- E. Activities in which I enjoyed participating (please give details)
- E. Other—please give details

3) What are the reasons you decided to leave UUFG or decided not to join? Circle all that apply.

- A. Joined a different church
- B. No minister or felt minister (when we had one) was not responsive to my needs.
- C. Sunday sermons or other parts of the service
- D. Did not feel welcome
- E. Not enough activities that met my needs, interests, or talents and skills
- F. UUFG no longer met my needs (Please be as specific as possible)
- F.. Other --please explain

4) What changes could we make in order for you to consider joining, rejoining, or becoming more active UUFG?

5) Could we contact you for questions about your responses or changes we are making to respond to your needs?

If you said "Yes," please give your name and the best way (email, phone, text or other way to contact you, and the best phone number and/or email to reach you.

Thank you for taking the time to answer these questions. Your answers will help us make UUFG a better community

David Willkomm

UUFG Governing Board Meeting Minutes

January 22, 2024 6:30pm – 8:52pm

Board members present: Rev. Dr. Tracie Barrett, Leah Cobb Lee, Mike Hazlett, Mary Anthony Erin Parish, Norden Lucke, Tim Christy, Tom Mareci

Congregation members present: Michael Bass, Judith Kendall, Liz Stewart, David Willkomm, Stuart Alan, Jim Wright

1. Gathering and Meeting Preparation

- a. Welcome, Call to Order, Quorum
- b. Leah Cobb Lee-Chalice Lighting and Reading
- c. All Read Board Covenant: *Inspired by our Unitarian Universalist principles, together we guide our congregation and its mission and vision with transparency, gratitude, trust and respect.*
- d. Personal Check-In
- e. Confirm Agenda and roles: Mary Anthony -timekeeper, Erin Parish-gratitude notes, external observer- Rev Tracie Barrett

2. Congregational Input- none

3. Consent Agenda

- a. Treasurer's Report October 2023 and commentary (Att 1). Mary Anthony, monthly budget was down \$ 11,643.57 of actual expenditures, only down \$500.00 on the year. Mike Hazlett, was that everything deposited for December? Mary Anthony, for 1st third was of December, last third was not deposited until new year.
- b. Fellowship Council November 2023 (Att. 2). Mike Hazlett, Choir Circle turned in revised charter, some other committees are working on theirs. Assisted on revising time and talent survey, Judith Kendall, Sandra Topp, Judy Oltman and Evan Waldt are helping. Safety Committee stated some concerns. Thanked Judith Kendall and Liz Stewart in worship and Kirsten Flamand on decorations and choir work.
- c. Admin Report October 2023 (Att. 3). Cam Pierce wrote Admin Report. No Religious Education Report from James.

- d. Board Meeting Minutes October 2023 (Att.4). **MOTION** to approve consent agenda made by Mike Hazlett. Leah Cobb Lee seconds. **PASSES** unanimously.

4. Discussion, Action Items, Visioning

- a. Email vote regarding trespassing – Leah Cobb Lee, Jonathan Coron sent the board an email yesterday (Jan 16) regarding Brith Adams: **"...the safety team recommends to the board that Brith should be asked to stop visiting the Fellowship, and that if she continues to visit, that she be trespassed... However, before moving forward with any such communication, the safety team would like the board to approve this recommendation and its timing, and provide any additional feedback as needed."**

Leah Cobb Lee, think we should vote on this because the Safety Team is asking for board approval; since we won't meet before Sunday, the vote will need to be done over email. So here's my **MOTION: I move to approve the Safety Team's recommended course of action regarding Brith Adams: that she be asked, before Sunday service, to stop visiting the Fellowship, and that if she continues to visit, that she be trespassed.**

Leah Cobb Lee, I hear James's suggestion that we wait until everybody leaves on Sunday, but I still think it should happen before Service (before people arrive). Cussing at child care staff? I don't want anything like that to happen again, And if she was kicked out of a grace Marketplace, there's really nothing we can do for her. If any body second this motion, I'll need a vote from each of you, Erin Parish seconds. **PASSES** unanimously. Norden Lucke stated, Jonathan Coron called the police and officer told Brith she would be trespassing if she showed up again.

- b. Ad hoc committee to host live streaming UUA General Assembly 2024 – Leah Cobb Lee – Leah Cobb Lee, David Willkomm wants ad hoc committee to host live stream of UUA General Assembly. Rev Tracie Barrett, it can get people interested, it is the business of the congregation, it can be a good time to get a committee together now. Judith Kendall, the Leadership Develop Committee (LDC) is very interested in this, need to get somebody with tech support to help David Willkomm set up, LDC is can use some of our funds and is

happy to pay for it. Erin Parish, last year I registered and David Willkomm, Alice Primack and I watched Ware Lecture Together in Common room, so we could do it that way. Leah Cobb Lee, Yes, I will get back with the Board, people will be interested because of Article 2 vote.

- c. Interim minister search committee update – Leah Cobb Lee- Leah Cobb Lee, committee consists of Mike Haslett, Norden Lucke, Tim Christy, Liz Stewart, Mary Anthony, Mary Bahr says not on committee thinks she upset you. Tim Christy, Mary Bahr did not upset us. Concern there is no representative from Social Justice, a lot of Board members. Tim Christy, do we want a young person on the committee? Leah Cobb Lee, how big do we want to make the team? Mary Anthony, not more than seven. Rev Tracie Barrett, if young adults and youth don't have time to commit get with them so they feel represented. Tim Christy, I will ask Alice Primack. Leah Cobb Lee, I will reach out to young adult group.
- d. Article II Workshop update – Erin Parish, James did send me some material from UUA, I need to get with David Willkomm and then we both need to get with James to finalize.
- e. **Scheduling** – Leah Cobb Leah
 - i. Schedule Finance Town Hall in February – Jim Wright, 1st Finance Town Hall meeting is February 25th.
 - ii. Schedule April Board meeting to approve 2024-2025 budget proposal – Leah Cobb Lee, need to schedule special Board meeting before April Board meeting to approve budget. Mike Hazlett, Stewardship should have idea of giving levels then. Mary Anthony, special Board meeting on April 16th at 7pm. Leah Cobb Lee, I have to send out notice to congregation 2 weeks before that we are having a special Board meeting.
 - iii. March 24th Pledge Sunday
 - iv. May 5th Annual Congregational meeting

5. **Management and Facilities**

- a. Solar project update – Tim Christy, The project cost is \$90,700.00, we have \$89,537.00, we are short \$1182.00, we have verbal pledges for \$1200.00, I made sure to tell everybody not to give to solar project if it would take away from their pledge to UUFG. Mike Haslett, have all

the checks been deposited into a checking account? Tim Christy, they are in the bank.

- b. Follow-up on UUFG safety/security concerns – Leah Cobb Lee, I sent email to members about safety, got a good response.
- c. Sound issues in sanctuary – Erin Parish and Norden Lucke, Erin Parish, Norden really isn't involved in sound, so I'll respond, the pulpit and choir ceiling mics were not working, they are now working, Jim Benedict, who has a lot of experience in sound pointed out that they run off of phantom power (whatever that is) and that particular button had been turned off, so now I know to look for that, the renter that uses the sound board on Sunday after us possibly turns it off, both Ricardo and I now know to be aware of that, glad that Jim Benedict could help out.
- d. Safety check of sanctuary chairs – Erin Parish and Norden Lucke, Leah Cobb Lee, due to choir member's chair breaking and person falling. Norden Lucke, Jonathan Coron said he would take care of it, Liz Stewart, chairs for the choir have been replaced.

6. Leadership and Governance

- a. Salary increase for Congregational Administrator (Att. 5) – Jim Wright, Personnel Committee looks at what he does, Cam is a manager using the UUA guidelines, index 2, the Finance Committee feels that Cam falls into special circumstances category due to the extra work he has done during the transition period and because of the many years he has worked at UUFG and the institutional memory he has, He currently works 32 hours a week. Jim Wright, *we recommend Cam get a 5% salary increase and that this raise be made retroactive to the beginning of this fiscal year(July1,2023), the retroactive portion can be taken can be paid in a lump sum or in payments , the raise would then continue monthly the rest of this fiscal year.* (Italics from Att.5). Leah Cobb Lee, when we pay him retroactively how will that be reconciled tax-wise for Cam?. Mary Anthony, it would be income for 2024. Mary Anthony, **MOTION** to increase Cam's salary by 5%. Tom Mareci seconds. **PASSES** unanimously.
- b. LDC Charter revision (Att. 6) – Judith Kendall, it's a minor revision, more concise and succinct. Leah Cobb Lee, if it's minor we can approve charter tonight. Tom Mareci, did you add or take anything

out? Judith Kendall, it's pretty much a phrasing change. Leah Cobb Lee, we can do it next month. Judith Kendall I'm fine with that.

c. LDC Report on leadership recruitment – Judith Kendall, concerned about Personnel Committee I thought we were all set and they all resigned, I'm not willing to go and recruit 3 more people right now, in retrospect I should have let them know their charge, my suggestion is the 3 Board trustees serve as Personnel Committee right now for the rest of the year since it is a Board purview.

.d. Pledge campaign update – Judith Kendall, Leah will need to write a letter to the congregation about the pledge drive.

e. Board retreat follow-up – Leah Cobb Lee, we need to meet for follow-up, do we want to meet on our own or with the LDC? Tim Christy and Tom Mareci, with LDC if they are willing to. Leah Cobb Lee, would after a service on a Sunday work?, I was thinking more of a meeting just to go over goals, how about during a Board meeting? Tom Mareci, I'd rather do it in person. Tim Christy, if we could work around Our Whole Lives(OWL) for Tom, meet January 28 in Common room after service.

f. Paul Bird Leadership Development Funds (Att. 7) – Judith Kendall, General Assembly (GA) is virtual, didn't spend much money for training we decided to put money into GA, any money we don't use can be rolled over, the money can be used for delegates to GA, can buy lunch for people coming to UUFG to view GA. Mary Anthony, looks like vast majority of funds will be used for GA. Mary Anthony, **MOTION** for roll over of Leadership Development Funds. Norden Lucke seconds. **PASSES** unanimously.

g. Unitarian Universalist Association (UUA) Certification; congregational dues (Att. 8) – Leah Cobb Lee, dues predicted to be \$17,078.00 next year, we got certification this year, will be adjusted with the form we submit. Mary Anthony, since we put solar on, we anticipate dues going up. Jim Wright, financial town hall after service 2/25 which is before next Board meeting, we made a working assumption we would consolidate interim minister and Rev Christie's sabbatical money to use half in 1st year and half in 2nd year.

7. Wrap Up

- a. Emerging concerns – Leah Cobb Lee, Personnel Committee
- b. Calendaring and Action Items – Add choir circle and LDC charters to next agenda. Leah Cobb Lee to reach out to young adult group about serving on Interim Minister Search Committee.
- c. Gratitude Notes - Erin Parish to write notes to Jim Benedict, Susan Christy, Jonathan Coron, Safety Team.
- d. Board Process – Rev Tracie Barrett, I thought you did great.
- e. Next meeting February 26, 2024

8. 7:52 – Executive Session**9. 8:50 – Adjournment**

Respectfully submitted by

Erin Parish

Governing Board Secretary



Unitarian Universalist Fellowship of Gainesville

To: Governing Board
From: Cam Pierce
Date: February 21, 2024
RE: Monthly Congregational Admin Report to the Board

Gratitude

First, I wish to express my profound gratitude to the Governing Board and the Finance Committee for recommending my raise, which the Board passed during its January meeting. I am grateful to work in such a positive and uplifting environment, and I am pleased that the Board has seen fit to recognize my contributions to UUFG in this way. Many thanks!

Membership Numbers

We currently have 153 members and 23 supporting friends on our rolls. This past month, we welcomed Ellen and Steve Cecil to membership. Last year at this time we reported 151 members and 20 supporting friends.

Sunday Service Attendance

Sundays, January 2024 –

- Average in person attendance for four Sundays: 76
- Average YouTube visits for three Sundays: 78
- Total average participation for four Sundays: 134
- Current YouTube subscribers: 300

Date	YouTube	In-Person Attendance	Total
1/7/2024	83	70	153
1/14/2024	n/a	76	76
1/21/2024	59	72	131
1/28/2024	93	84	177

Sundays, January 2023 –

- Average in person attendance for five Sundays: 78
- Average YouTube visits: 79
- Total average participation for five Sundays:142
- Current YouTube subscribers: 237

Date	YouTube	In-Person Attendance	Total
1/1/2023	N/A	44	44
1/8/2023	83	107	190
1/15/2023	95	78	173
1/22/2023	75	81	156
1/29/2023	63	82	145

Attendance for January

01/02/2024	Morning Meditation	P Turner	8
01/02/2024	Worship Team	L Stewart	7
01/06/2024	Grace Marketplace	J Oltmans	9
01/06/2024	Friends of the Courtyard	P Maloney	5
01/07/2024	HUUGG / Humanist Class	K Anderson	13
	Sunday Service - in person		65
	Sunday Service - online		83
	Childcare/Children		2k+3a
	OWL Class	J Chase	7k+2a
01/08/2024	Care Team	J Wright	8
01/09/2024	Morning Meditation	J Gossman	5
01/09/2024	Fellowship Council	M Hazlett	8
01/10/2024	Young Adult Group	K Hagan	3
01/11/2024	UUFG Men's Lunch Group	T Christy	7
01/11/2024	Pickleball	K Flamand	3
01/11/2023	Sight Reacing for Singers	K Flamand	4
01/11/2024	Chalice Choir	K Flamand	16
01/12/2024	TGIF	R Dinklage	20
01/13/2024	Buildings & Grounds Work Morning	M Roberts	7
01/13/2024	UU Book Circle	M Soles	9
01/14/2024	Sunday Service - in person		67 adult
01/14/2024	Sunday Service - online		n/a
01/14/2024	Childcare/Children/RE		7k + 2a
01/14/2024	OWL Class	J Chase	8k + 2a
01/14/2024	Middlers Class	J Chase	
01/14/2024	Newcomers Orientation	J Kendall	4
01/14/2024	LDC Committee	J Kendall	5
01/15/2024	MLK March	M Bahr	8
01/16/2024	Morning Meditation	D DePuydt	11
01/16/2024	Safety Committee	J Coron	4

01/16/2024	Finance Committee	J Wirght	10
01/17/2024	Questors Touchstone Group	D Neill-Mareci	5
01/18/2024	UUketarians	K Flamand	9
01/18/2024	Sight Reacing for Singers	K Flamand	7
01/18/2024	Chalice Choir	K Flamand	18
01/21/2024	HUUGG / Humanist Class	K Anderson	13
	Sunday Service - in person		65
	Sunday Service - online		59
	Childcare/Children/RE		4k + 3a
	OWL Class	J Chase	8k + 2a
	Middlers Class	J Chase	
	Social Justice Circle	M Bahr	14
01/22/2024	Governing Board	E Parish	14
01/23/2024	Morning Meditation	P Turner	8
01/24/2024	Young Adult Group	K Hagan	
01/25/2024	Sight Reading for Singers	K Flamand	
01/25/2024	Chalice Choir	K Flamand	16
01/27/2024	Auction	S Christy	60+
01/28/2024	Sunday Service - in person		75
	Sunday Service - online		93
	Childcare/Children/RE		7k + 2a
	OWL Class	J Chase	cancelled
01/30/2024	Morning Meditation	P Turner	9
01/31/2024	Auction Team	S Christy	

UUFG Office Notes

Website and Email Hosting

Several years ago, Rev. Christe Lunsford and Dianna Ott were instrumental in setting up our current website, which uses Wordpress software. In updating our website, we moved our website server to DreamHost from Uuism.net. However, because of technical issues, we never transitioned our email provider from Uuism.net to DreamHost.

This past month, I have worked with Debra Neill-Mareci and professional technical help at DreamHost to make the email server transition. For a variety of reasons, having our www.uufg.org website and our uufg.org emails managed by a single provider is considered best practice.

We have contracted with DreamHost for them to manage the email transition. However, they don't work with listservs. Consequently, I have recreated all of our listservs in DreamHost, so that once DreamHost has transferred all our email data to DreamHost, then I can go into our domain registrar (Network Solutions) and change our DNS records to point to the DreamHost site.

Following the email transfer, we will then transfer our domain registrar from Network Solutions to DreamHost, at which point we will create appropriate DMARC (Domain-based Message Authentication) records in DreamHost to enable us to resume using MailChimp.

Rentals

Our main two renters are Gainesville Bridge Club and Joy of the Lord Outreach Ministries. JOLM have used our Fellowship Hall on Sunda. JOLM has stopped using our classrooms on Wednesdays for the time being. They asked me to provide documentation that they are currently operating on our premises, so that they can renew their tax-exempt status. In January, our rentals also included Paynes Prairie Chapter of the Florida Native Plant Society and Life Line Screening.

Mailings & Communications

I continue to send the link to monthly Touchstone Journals via MailChimp with some hard copies mailed to a few members who requested that service. Also as usual, I sent out anniversary letters to all members who have joined the Fellowship in any given month as well as creating weekly Gazettes. Because we cannot use MailChimp until we can create appropriate DMARC records, I have sent out Chalice Connections information via News and Needs.

Finance

Per the Finance Committee's recommendations, in addition to our Vanco online platform, we have created and begun using both PayPal and Venmo as methods for giving. At this point, we have started using a QR code that enables potential givers to make contributions for service offerings. I also met with Mary Anthony, Mike Hazlett, and Jim Wright of the Finance Committee to help a proposed budget for the upcoming fiscal year.

I worked with Mignon Craig, our bookkeeper, to send out W2 documents and 1099 forms..

With Mary Anthony, we sent out second quarter financial statements and 2023 statements for tax purposes. I have responded to several members to answer questions and/or provide additional documentation for their tax returns.

Finally, to assist with the Auction, we have used, apparently successfully, our new Stripe.com account for online payments.

Bookkeeper Position

We still need to find a replacement for Mignon. Debra Neill-Mareci was working on using the acfla@uufg.org listserv to see if we can "get the word out" to other churches. However, we have not identified candidates as yet. We will probably need to start cold-calling local churches to get names and recommendations.

Zoom

Our Zoom contract via the UU Ministers Association ended in January. I worked with Jessica Curren in the UUA Southeast Region Office to transition to a new Zoom contract via the UUA. The new accounts are not as robust as the UUMA provided, but the new contract should provide adequate service for our needs.

Safety Committee

I attended the January and February Safety Team meeting, chaired by Jonathan Coron. With members of the Governing Board and the Care Team, we seem to have managed an emerging issue with several homeless individuals. We're also continuing to research options for video surveillance capabilities.

Front Sign

I have been changing messages on the front sign to reflect upcoming service titles or speakers.

Facilities

Our annual fire system check is scheduled for Thursday morning, March 7.

Personal Time

I am presently scheduled to take time off

- Friday, March 1 for a short trip.
- Monday, March 4 for jury duty. I hope that I will not be selected for a jury, but that possibility remains.
- Friday, March 8 through Wednesday, March 13 for spring break

Summary of Changes to LDC Charter

1. Purpose—No change.
2. Members and leadership—took out list of committee members.
3. Meetings—no change.
4. Responsibilities and Duties—
 - Language clarified;
 - item added about offering training;
 - Item added to say we work with Board and Minister in all activities;
 - Item removed about Paul Bird leadership development funds because it is covered in #5.
5. Annual Budget—Language added about funds from UFG budget.
6. Annual Goals—Updated to 2023-24 Goals.

CHARTER

Leadership Development Committee Approved: *by the LDC October 25, 2023*

1. Purpose of the Leadership Development Committee:

The Leadership Development Committee (LDC) organizes and facilitates growth and development opportunities and events for Fellowship's leaders. It also identifies, evaluates, and nominates Fellowship members for elected positions.

2. Committee/Group Members & Leadership:

Members of this committee are elected by the Fellowship. In the case of a vacancy between elections, interim members may be appointed by the board, as per the UUFG bylaws.

3. Meetings:

The committee meets approximately once a month in closed meetings.

4. Responsibilities

There are two main categories of responsibilities for the LDC.

1. We recruit and nominate members for elected positions at the Fellowship. In particular, this includes four officers (President, Vice President/President-Elect, Secretary, and Treasurer) and three Board trustee positions. We also nominate members for election to the LDC.

In the case of a vacancy on the Board or the LDC, we work in cooperation with the President to identify and recruit candidates for open positions.

2. We offer workshops, trainings, retreats and other programs to assist current and future leaders at UUFG. These programs may vary from year to year according to the needs of the congregation and the resources available. We also work to recruit current and future leaders for other leadership development opportunities offered by our denomination.

In all our activities, we work in consultation with the minister and the President of the Board.

5. Annual Budget:

The committee is provided with an annual budget by UUFG. In addition, it may disburse funds from the Paul Bird Leadership Development Fund for purposes consistent with the goals of the LDC.

6. Annual goals for 2023-24

- Present a slate of candidates for open officer and board trustee positions for election at the annual meeting.
- Recruit two additional members for the Leadership Development Committee.
- Conduct a retreat for the Board in Fall 2023.
- Design additional programs for recruitment of future leaders.



Annual Report 2023

The mission of the Unitarian Universalist Fellowship of Gainesville Foundation is to create a legacy of hope, to foster the joy of giving and ensure the preservation and outreach of UUFG and Unitarian Universalism.

Annual Report 2023

Unitarian Universalist Fellowship of Gainesville Foundation

Foundation Directors

Jeanne Gossman (appointed Jan 2020: reappointed July 2023): Chair

Cindy Prabst (appointed April 2021): Financial Secretary

Kristin Stevens (appointed July 2023): Education Secretary

Pete Turner (appointed March 2023): Recording Secretary

Sandra Topp (appointed Jul 2021): Communication Secretary

During 2023, the Foundation welcomed Pete Turner who became Recording Secretary. In July, Kristin Stevens joined as Education Secretary. Jeanne Gossman began a second three-year term.

Tamara Evonne's three-year term ended June 30, 2023. Mary Anthony left the Foundation to become Treasurer of the Governing Board in March, 2023.

Assets and Management

UUFGF continues to place the majority of resources invested with the Unitarian Universalist Common Endowment Fund (UUCEF). In 2023, the financial markets rose after the 2022 slump. The UUFG Foundation balance increased to \$460,733.99.

A detailed financial summary for FY 2023 is included in this report.

Investing with the UUCEF brings an important dimension - an active program of Socially Responsible Investing. SRI consists of making investment decisions that reflect UU values and contribute to positive social and environmental change.

The Foundation plans to continue our investment relationship with UUCEF.

Donations

In March 2023, UUFG received a \$5000 donation from Frances Fowler as part of her estate. Because the donation was undesignated, the Foundation received 50% and the UUFG operating fund received 50%. \$2500 was deposited in Ameris.

Bird Leadership Fund

The UUFG Governing Board approved the Bird Leadership Development Council's plan of action for the year. \$5000 was requested, approved and distributed to the Bird Leadership Development Council. The restricted fund balance is \$7096.23.

Grants Awarded

Grants are determined with an emphasis on support of Unitarian Universalism through appropriate long-term human and physical capital investments and for non-budgeted projects within UUFG.

- Youth Financial Assistance to General Assembly \$5000
- Solar Panel and EV Installation \$10,000
- Unbanning Books: Purchase of Banned Books \$500
- Security Camera and Doorbell System \$600

Grants

Each year a portion of the UUFG Foundation's earnings is made available to fund grant requests.

The Foundation uses the UUA's Harvard Method of 13 rolling quarters to calculate an amount available for utilization.

In 2023, there were two grant cycles. Four projects were approved totaling \$16,100.

Other Projects

Recently, the Foundation Directors optimized record storage by consolidating essential documents onto a Google Drive platform. Archived are the financial records for the past eight years, documents of meetings and annual reports categorized by year from inception in 1982 to present. A spreadsheet of grants from 2008 to present is archived as well as a donor log from 1984 to present.

The information is safely archived, shared and readily available to authorized users.

Policy 3.1 addressing undesignated donation was revised to improve clarification. The Governing Board approved and adopted the language.

In 2023, we reviewed the unspent funds from grants approved in past years. In accordance with procedure 10.6, “Grant funds that have not been expended one year from the date of the grant award shall be returned to the Foundation unless an extension has been granted by the Foundation Directors.” The grant recipients were contacted and funds no longer needed were returned to the Foundation.

Future Plans

We have an energetic, collaborative team with fresh ideas. We are streamlining the grant application process by making the application forms accessible for online completion. We’ve timed the grants cycle approval process to allow adequate time for the Directors’ questions to be answered prior to deliberation.

Respectfully Submitted,

The UUFG Foundation Directors

February 27, 2024

Quarter balances		Ameris Checkin g	UUCEF	Designated Funds	Notes
12-31-2022	Bal. fwd.	\$12,047.62	\$415,739.38	\$12,096.23 - Bird Leadership	Fund balance
1/31/2023		\$12,047.62	\$440,664.71		
2/28/2023		\$13,547.62	\$421,644.48	\$7,096.23 - Bird Leadership	Fund balance
1st Quarter End		\$16,047.62	\$428,765.57		
4/30/2023		\$11,047.62	\$434,023.90		
5/31/2023		\$11,405.95	\$427,502.28		
2nd Quarter End		\$11,405.95	\$443,345.68		UUCEF Fiscal year begins
7/31/2023		\$11,405.95	\$454,441.69		
8/31/2023		\$12,679.50	\$442,005.95		
3rd Quarter End		\$12,679.50	\$426,468.31		
10/31/2023		\$2,179.50	\$414,446.96		
11/30/2023		\$2,179.50	\$441,044.40		
4th Quarter End		\$1,579.50	\$460,733.99		
12/31/2023				\$7,096.23 - Bird Leadership	Fund balance



FLO RIDA DECIDES HEALTH CARE

Ballot Initiative Campaign to Expand Medicaid Access in Florida

PD, POL, ADV. PAID FOR BY FLORIDA DECIDES HEALTHCARE, INC., P.O. BOX 10829, TALLAHASSEE, FL 32302. CONTRIBUTIONS TO FLORIDA DECIDES HEALTHCARE, INC. ARE NOT DEDUCTIBLE FOR FEDERAL INCOME TAX PURPOSES

Hub Process



Hub Process

Petition Pickup

- Volunteers or other organizations can come and pick up petitions and intake forms. This will be based on a schedule that the hub location sets.
 - Make sure to give a number of intake forms, given that petitions collected may come from various counties



**FLORIDA DECIDES
HEALTHCARE**

Hub Process

Intake Form

Intake Form



Florida Decides Healthcare Petition Intake Cover Sheet

Please return this cover sheet along with all completed petitions

YOUR name	
YOUR phone number	
YOUR e-mail address	
YOUR organization or congregation (if applicable)	
How many complete petitions are you submitting?	
How many incomplete petitions are you submitting?	
Date of petition submission	

Please check that each petition has all of the required information

- The voter's name (as it appears on their voter registration card)
- The voter's address (including city, zip and county)
- The voter's date of birth OR voter registration number (only need one)
- The date the voter signed the petition, as recorded by the voter



FLORIDA DECIDES HEALTHCARE

Hub Process

Intake Form

- An intake form should be completed for every stack of petitions with a unique organization or congregation associated with them when dropped off by volunteers or partner organizations.
 - Intake forms should be paperclipped with the stack of petitions being turned in.
 - Dropped off petitions should clearly label the organization they are associated with

if the volunteers do not complete, the hub will be responsible for completing this step



**FLORIDA DECIDES
HEALTHCARE**

Florida Decides Healthcare Petition Intake Cover Sheet

Please return this cover sheet along with all completed petitions

YOUR name	
YOUR phone number	
YOUR e-mail address	
YOUR organization or congregation (if applicable)	
How many complete petitions are you submitting?	
How many incomplete petitions are you submitting?	
Date of petition submission	

Please check that each petition has all of the required information

- The voter's name (as it appears on their voter registration card)
- The voter's address (including city, zip and county)
- The voter's date of birth OR voter registration number (only need one)
- The date the voter signed the petition, as recorded by the voter.

Hub Process

Intake Form

- Always stress the importance of accuracy on the intake form for soft reporting purposes.

Attachment 8

Florida Decides Healthcare Petition Intake Cover Sheet

Please return this cover sheet along with all completed petitions

YOUR name	
YOUR phone number	
YOUR e-mail address	
YOUR organization or congregation (if applicable)	
How many complete petitions are you submitting?	
How many incomplete petitions are you submitting?	
Date of petition submission	

Please check that each petition has all of the required information

- The voter's name (as it appears on their voter registration card)
- The voter's address (including city, zip and county)
- The voter's date of birth OR voter registration number (only need one)
- The date the voter signed the petition, as recorded by the voter.



Hub Process

- Collected petitions are like gold, make sure it's stored in a safe place.



Hub Process

Petition drop off

Community hubs will
create a process for weekly
drop off to Regional Hubs
by Thursdays at 5 pm



Hub Process

Petition drop off

Each hub location will be required to enter petition collection soft report numbers by 12 pm every Friday



Hub Process

Petition drop off

Collect petitions that
return and have them
mailed to our central hub
by 5pm every Friday





Questions?

Contact us: jake@floridadecideshealthcare.org, kofi@floridadecideshealthcare.org



Current Status of Medicaid in Florida

- Non-disabled adults without children are ineligible for Medicaid in Florida, regardless of income.
- Parents of minors in a three-person household must earn less than \$8,000 per year to qualify.
- Nearly 400,000 Floridians are in the "coverage gap," too poor for federal subsidies but ineligible for Medicaid.¹
- 1.46 million Floridians would gain healthcare access through Medicaid expansion.²
- Following the passage of Medicaid expansion by North Carolina's Republican controlled legislature this year and a successful ballot initiative in South Dakota during the 2022 election, Florida is one of just 10 states that has not expanded Medicaid.
- Recent polling shows that 76% of Floridians support expanding Medicaid, including 62% of Republicans.³

Benefits of Medicaid Expansion in Florida

Cost Savings

- Medicaid expansion would save Florida between \$200M⁴ and \$385M⁵ annually.
- Florida would receive a \$2.8B federal incentive over two years under the American Rescue Plan Act.⁶

Economic Impacts

- Medicaid expansion would result in over 130,000 new jobs created in Florida.⁷

¹[How Many Uninsured Are in the Coverage Gap and How Many Could be Eligible if All States Adopted the Medicaid Expansion? | KFF](#)

²[3.7 Million People Would Gain Health Coverage in 2023 If the Remaining 12 States Were to Expand Medicaid Eligibility](#)

³ <https://floridadecideshealthcare.org/wp-content/uploads/2023/04/FLMedicaidPollResults323.pdf>

⁴<https://www.floridapolicy.org/posts/potential-budget-savings-and-revenue-gains-from-medicaid-expansion-in-florida>

⁵<https://www.commonwealthfund.org/blog/2019/medicaid-expansion-florida-budget-buster-or-deal-century>

⁶<https://www.cbpp.org/research/health/last-11-states-should-expand-medicaid-to-maximize-coverage-and-protect-against>

⁷https://e.infogram.com/0572f75e-a2bf-43e2-a869-563f4607deda?parent_url=https%3A%2F%2Fwww.commonwealthfund.org%2Fpublications%2Fissue-briefs%2F2021%2Fmay%2Feconomic-employment-effects-medicaid-expansion-under-arp&src=embed#

- Economic output would increase by nearly \$90B in the first three years after Medicaid expansion.⁸
- Expanding Medicaid would reduce healthcare costs for all Floridians by reducing what the Florida Chamber of Commerce has dubbed “hidden tax” of \$1.4 billion due to uncompensated care costs to health providers and insurance companies.⁹
- Small businesses and their employees have benefited in states that expanded Medicaid.¹⁰
- Financial stability improves in expansion states, with better credit scores, less evictions and medical debt¹¹, and fewer bankruptcies.¹²

Impact on Florida’s Rural Healthcare

- States that expanded Medicaid saw more than three times¹³ the rate of decline in uninsured rates for low-income adults living in rural areas and small towns than non-expansion states.
- A study published in January 2018 found that Medicaid expansion was associated with improved hospital financial performance and significant reductions in the probability of hospital closure, especially in rural areas.¹⁴

Mental Health Impacts

- There are more than 500,000 uninsured Floridians who suffer from mental illness.¹⁵
- Expansion would improve access to mental health and opioid-use disorder services.¹⁶

Impact on Florida’s Senior Citizens

- Low-income seniors would gain life-saving care; 2,776 premature deaths could have been avoided from 2014-2017.¹⁷

⁸https://e.infogram.com/4d9fb9f0-08ed-4845-8a69-42d5c92674bd?parent_url=https%3A%2F%2Fwww.commonwealthfund.org%2Fpublications%2Fissue-briefs%2F2021%2Fmay%2Feconomic-employment-effects-medicaid-expansion-under-arp&src=embed#

⁹ <https://www.flchamber.com/bending-floridas-healthcare-cost/?amp=1>

¹⁰<https://www.cbpp.org/research/health/taking-away-medicaid-for-not-meeting-work-requirements-harms-low-wage-workers>

¹¹<https://www.kff.org/medicaid/report/the-effects-of-medicaid-expansion-under-the-aca-updated-findings-from-a-literature-review/>

¹²<https://ccf.georgetown.edu/2018/09/25/health-insurance-coverage-in-small-towns-and-rural-america-the-role-of-medicaid-expansion/>

¹³<https://ccf.georgetown.edu/2018/09/25/health-insurance-coverage-in-small-towns-and-rural-america-the-role-of-medicaid-expansion/>

¹⁴ <https://www.healthaffairs.org/doi/10.1377/hlthaff.2017.0976>

¹⁵https://uploads-ssl.webflow.com/5cd5801dfdf7e5927800fb7f62fafdf6578196d016e86818_Medicaid_Chartbook_August_2022_FINAL.pdf

¹⁶<https://www.commonwealthfund.org/publications/journal-article/2019/may/medicaid-expansion-states-more-people-had-access-opioid>

¹⁷<https://www.cbpp.org/research/health/medicaid-expansion-has-saved-at-least-19000-lives-new-research-finds>

Criminal Justice Impact

- Expansion would provide healthcare to justice-involved individuals, reducing recidivism.¹⁸
- Millions could be freed up in the Florida Department of Corrections budget for reinvestment.

Florida Decides Healthcare

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¹⁸ <https://www.healthaffairs.org/doi/10.1377/hblog20200218.910350/full/>

CONSTITUTIONAL AMENDMENT FULL TEXT**Ballot Title:**

Provide Medicaid Coverage to Eligible Low-Income Adults

Ballot Summary:

Requires State to provide Medicaid coverage to individuals over age 18 and under age 65 whose incomes are at or below 138 percent of the federal poverty level and meet other nonfinancial eligibility requirements, with no greater burdens placed on eligibility, enrollment, or benefits for these newly eligible individuals compared to other Medicaid beneficiaries. Directs Agency for Health Care Administration to implement the initiative by maximizing federal financial participation for newly eligible individuals.

Article and Section Being Created or Amended:

Article X, Section 33

Full Text of the Proposed Amendment:

A new Section 33 is added to Article X of the State Constitution, as follows:

SECTION 33. Provide Medicaid Coverage to Eligible Low-Income Adults.–

(a) MEDICAID COVERAGE FOR LOW-INCOME ADULTS. The State shall provide Medicaid benefits to Low Income Adults over age 18 and under age 65 whose income is one-hundred thirty-eight percent (138%) of the federal poverty level or below, and who meet other nonfinancial eligibility requirements of the federal Medicaid statute. The State shall not impose on Low Income Adults any greater or additional burdens or restrictions on eligibility, enrollment, or benefits than on any other population eligible for medical assistance.

(b) DEFINITIONS. For the purposes of this section, the following words and terms shall have the stated meanings:

(1) "Low Income Adults" refers to those individuals over age 18 and under age 65, whose income is one-hundred thirty-eight percent (138%) of the federal poverty level or below, as described by and using the income methodology provided for by the federal Medicaid statute at 42 U.S.C. § 1396a(a)(10)(A)(i)(VIII), and who meet applicable non-financial eligibility conditions for Medicaid under 42 CFR Part 435, Subpart E.

(2) "Agency for Health Care Administration" or "Agency" refers to the single State agency responsible for administering Florida's Medicaid plan pursuant to 42 U.S.C. § 1396a(a)(5) and § 409.902, Fla. Stat.

(3) "State Plan Amendment" refers to the document(s) the State submits to the Centers for Medicare and Medicaid Services (CMS) for review and approval before making a change to its program policies, including setting forth the groups of individuals to be covered.

Initiative Information

Date Approved 12/12/2018

Serial Number 18-16

Sponsor Name: Florida Decides Healthcare, Inc.

Sponsor Address: 2 South Biscayne Boulevard Suite 3100, Miami, FL 33131

CONSTITUTIONAL AMENDMENT FULL TEXT

(4) "Centers for Medicare and Medicaid Services" refers to the agency responsible for administering the Medicaid program at the federal level, including review and approval of State Plan Amendments.

(c) IMPLEMENTATION.

(1) Within 90 days of voter approval of this Section, in order to implement the provision of Medicaid coverage to Low Income Adults and obtain Federal Medical Assistance Percentage funds for the cost of their coverage, the Agency for Health Care Administration shall submit a State Plan Amendment and all other necessary documents, as well as take any additional necessary steps to seek required approvals from the Centers for Medicare and Medicaid Services to include Low Income Adults as a coverage group in Florida's Medicaid program.

(2) Nothing in this Section shall limit the Legislature from enacting laws consistent with this Section. Specifically, it is consistent with this section to add a new subsection (section (9) below) to Fla. Stat. 409.903 Mandatory payments for eligible persons.—

(9) A person over age 18 and under age 65 whose income is 138 percent of the poverty level or below.

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