

Chapel Hill Friends Meeting

Newsletter: Tenth Month, 2024



Monthly Query: *What am I doing to reduce polarization within our community and the larger community?*

Monthly Worship Tip from the M&W Committee: *Friends who set aside time each day for meditation, personal prayer, or reflection often find it strengthens and deepens their experience with the living silence of meeting for worship. Such preparation readies the mind and opens one's heart and spirit to engage in deep communion with others.*

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Monthly Calendar

First Sunday	<ul style="list-style-type: none">● 8:15 - 9:15 am - Early worship in the meeting room● 9:30 - 10:30 am - Forum via Zoom● 11:00 am - 12:00 - Worship in the meeting room● 11:00 am - 12:00 - Online worship via Zoom● After meeting - Potluck in the schoolhouse
Second Sunday	<ul style="list-style-type: none">● 8:15 - 9:15 am - Early worship in the meeting room● 9:30 - 10:30 am - Forum via Zoom● 11:00 am - 12:00 - Blended Meeting in the meeting room and via Zoom
Third Sunday	<ul style="list-style-type: none">● 8:00 - 9:00 am - Early worship in the meeting room (reverts to 8:15 the following week)● 9:00 - 10:30 am - Meeting for Worship with Attention to Business via Zoom● 11:00 am - 12:00 - Worship in the meeting room● 11:00 am - 12:00 - Online worship via Zoom
Fourth Sunday	<ul style="list-style-type: none">● Same as Second Sunday
Fifth Sunday	<ul style="list-style-type: none">● 8:15 - 9:15 am - Early worship in the meeting room● 9:30 - 10:30 am - Forum via Zoom● 11:00 am - 12:00 - Worship in the meeting room● 11:00 am - 12:00 - Online worship via Zoom



Upcoming Zoom Fora

<https://www.chapelhillfriends.org/forums.html>

October 6: Devin Withrow from Baptist Joint Committee for Religious Liberty (P&J sponsored forum)

October 13: Tom Smith and Madalyn Finn on food issues and climate change (QEW sponsored forum)

October 20: MFWAB

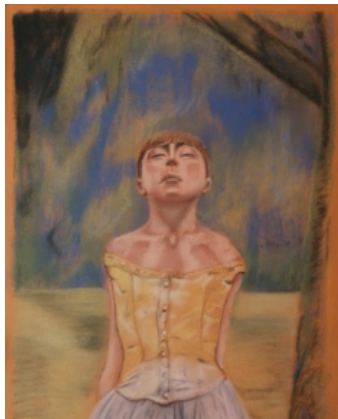
October 27: Monteze Snyder personal sharing



Upcoming Events

“Something to Say” Art Exhibit in Hillsborough, Sept. 18 - Oct. 13

“Something to Say” Exhibit, Displaying Work from Men Incarcerated at Orange Correctional Center (OCC)



Margaret Lane Art Gallery in Hillsborough (121 West Margaret Lane) is hosting an exhibit of visual art and poetry created by men incarcerated at Orange Correctional Center in Hillsborough. The exhibit, Something to Say, will open September 18 and close on October 13. The museum is open Wednesday and Thursday, 11:30 am to 6:00 pm; Friday and Saturday,

11:30 am to 7:30 pm; and Sunday, 1:00 pm to 6:00 pm. Please visit and enjoy works in charcoal, colored pencil, watercolor and acrylics, as well as OCC residents' poetry.

Questions? Contact Carolyn Stuart at stuartcarolyn95@gmail.com

"Joy of Abolition" Potluck: Good Cause, Good People, Fri. Oct. 4, 6 PM

Dottie Heninger shares with Friends:

CHFM supports the Orange County Coalition Remembrance Coalition (affiliate of the Equal Justice Initiative) to memorialized victims of lynching. The Coalition is co-hosting this event. Meeting members are welcome!

Please join us for community potluck and program in support of NCCoalition for Alternatives to the Death Penalty's efforts to compel Governor Cooper to commute all 136 NC death sentences before he leaves office!

NCCADP WALK for COMMUTATION

October 4th, 6:00

Mt. Bright Baptist Church

211 W. Union St., Hillsborough

OCCRC and Mt Bright Baptist Church are hosting an event that we are calling, "Joy of Abolition." We'll greet the walkers with a community potluck, followed by a showing of "Racist Roots" and a conversation with Reverend Dewey Williams on the joy of working to end the death penalty.

More information: "Events" at occrcoalition.org

Family and Friends Event, Sat. Oct. 5, 1:30-4 pm

As part of the "Something to Say" exhibit, a special event is planned for October 5, 1:30 to 4:00 at the Orange County Public Library in Hillsborough (137 West Margaret Lane). All are invited for a poetry reading of poems written by men from Orange Correctional Center. In addition to the poetry, there will be music provided by returning citizens who were once residents of OCC. Delicious sweet and savory dishes will be served, and there's a possibility of a dog training exhibit in the outside space. This event will take place in the community room of the Orange County Public Library, which is adjacent to Margaret Lane Art Gallery, where the visual art and poems of men at OCC will be displayed September 18 through October 13.

Questions? Contact Carolyn Stuart at stuartcarolyn95@gmail.com

Calling all Committee Clerks!, Sunday, Oct. 6, 1-3 pm

Save the date: Clerks Retreat, Sunday, October 6th, 1-3:00 in the Meeting House. Please mark your calendars now.. It's a potluck Sunday, so we will gather after the meal.

Ministry and Worship is planning this retreat. We welcome all ideas from clerks about topics you may want included. Send your thoughts to dottieheninger@gmail.com or to Carolyn White chwhitenc@gmail.com.

We look forward to having all committee clerks, or their representatives, attend. Lots to learn and share! Details will follow...

Piedmont Friends Fall Gathering Sat, Oct. 12, 11-3 pm

The PIEDMONT FRIENDS FALL GATHERING at HISTORIC BETHABARA PARK has been rescheduled to Saturday, October 12.

Several meetings have activities conflicting with the original date in September.



Join Piedmont Friends for fellowship, a BYO picnic lunch, tour of the historic Moravian Meetinghouse at [Bethabara Historic Park](#), exploring the grounds and walking trails, Moravian cookies and more.

Register Here: <https://www.emailmeform.com/builder/form/333179dDz58dVQ>

Piedmont Friends Website: <https://www.piedmontfriends.org/piedmont-friends-fall-gathering/>

Celebrating Otty Snyder's Life, Sun. Oct. 13, 2:30 - 4:30

Alice Carlton shares with Friends:

Our Friend Otty Snyder died September 14, 2024.

Friends are invited to join her family to celebrate her life at Carol Woods for wine and cheese in the social lounge Sunday, October 13th from 2:30-4:30 pm

Learn about her remarkable life in her obituary:

<https://www.legacy.com/us/obituaries/name/otty-snyder-obituary?id=56335763>

Early Voting Rally, Thurs. Oct. 17, 10 am-12

Carolyn White shares with Friends:

Join Interfaith Voices for Reproductive Freedom to kick off early voting by sharing our message at the Chapel Hill Peace and Justice Plaza (179 E. Franklin St), October 17 from 10 AM to 12 PM. Bring bodies and signs!

Contact: Carolyn White



Announcements

Quaker Call to Action-NC UPDATE

Pam Schwingl shares with Friends:

As we approach the remaining weeks of national, state and local elections that have profound consequences for our planet and our country, Friends around the country have joined millions of people who are working to assure fair and free elections everywhere. When we launched the Quaker Call to Action, we felt called to hold our elected officials accountable for truth and integrity as essential to the foundations of our democracy in the United States. The hopes and intentions we lay on ourselves to act on truth, with love as we pursue a more peaceful, just and sustainable world are consistent with the Quaker Call to Action.

You may already be engaged this election season working for free, fair and secure elections. Many Friends are volunteering with local or state-based organizations or directly with

candidates. THANK YOU! If you still want to volunteer in the next 5 weeks or on November 5, Election Day, we encourage you to take a look at our list of "Priority Actions to Support Democracy", making sure that YOU vote is at the top of the list! [CLICK HERE](#) to download our "Priority Actions To Support Democracy".

To hold the election in the lighth, the Quaker Call to Action invites you to join us for worship, reflection, and preparation on Sunday evening, November 3 from 7-8 PM EST. You can register [HERE](#). You will be receiving a separate invitation for this event soon.

Why Can't the Shotts/Leadership Development Committee Give Away Money?

Jan Hutton shares with Friends:

The Shotts Memorial and Leadership Development funds are available to help you grow as a Quaker and as a leader. We offer grants (no need to repay) helping to grow your gifts and provide service opportunities. Our committee discerns a brief application and gets back to you. Are you ready to participate in a program/class/training of your choosing that will enhance your gifts as a Quaker and/or as a leader? Funds are available for Adults and teenagers in our meeting family.

For more information about applying: <https://www.chapelhillfriends.org/committees.html> and scroll down to Shotts and Leadership Funds.

Video Recording - Building a Just & Lasting Peace

Lynn Wilson shares with Friends:

Zoom "attenders" for the Sept 5, 2024 panel, with AFSC's Joyce [Ajlouny](#) and a Palestinian American graduate student at Guilford College, were asked to share this link with our Meetings: [Building a Just & Lasting Peace - Panel 9/5/24 Recording](#)

Quakers for Peace in Palestine and Israel is an ad hoc group of Quakers working to bring about a just and lasting peace in Palestine and Israel. Their work is rooted in the Quaker Peace Testimony and historical Quaker work for justice and equality. Their goal is for Palestinians and Israelis to live in peace with equality and freedom; starting with an immediate ceasefire and full access to humanitarian aid.

Ramallah Friends School Needs Your Help!!!!

Betsy Brinson shares with Friends:

Ramallah Friends School is a 155 year old Quaker school located in the West Bank of Palestine. They are currently experiencing significant loss of tuition from the 1600 student families who attend. Unemployment is at 60-80% due to the nearby war in Gaza. and the decision of Israel not to give back the West Bank government their share of tax revenues. We are looking to raise significant scholarship money to keep the school going.

I will be attending the 11 am Meeting for Worship for the next two weeks. If you wish to donate for Ramallah Friends School, please bring your checkbook to a meeting and if you like, I can help you fill it out. (Basically you make the check to Friends United Meeting but in the lower left line write Ramallah Friends School Scholarship Fund). I will take your check and get it to the right source. Checks to RFS are tax deductible. I am also happy to take your cash donation. If you have questions, please contact me at betsybrinson422@gmail.com or cell 804-836-2669. You can also click here <https://www.justgiving.com/campaign/rfssolidarity> to read about and to contribute to the Solidarity Fund. And click [here](#) to learn more about Ramallah Friends School.

Apartheid-Free Pledge - CHFM Proposed Signing Statement

In the last forum concerning the Pledge, we learned that many people are not in unity with CHFM being a signatory to the Pledge as written. In response, P&J has been working on a Minute to attach to our signing of the Pledge. Many other signers have also done this. Click here for the proposed Minute

https://docs.google.com/document/d/1S10TUmnZ05zy0tUDRG8uEbwadL_LJFrY_xwSosuQWM/edit?usp=sharing

P&J is hopeful that this proposed Minute will be discussed at Meeting for Worship with Attention to Business or at a Called MFW with Attention to the Pledge.

Visit the website apartheid-free.org to read the pledge. The notes for our two Anti-Apartheid forums are [here](#) and [here](#). The public statements of FCNL and AFSC are [here](#).

PFYM did a Panel Presentation by local Friends who labor in Israel/Palestine - link here https://us02web.zoom.us/rec/share/XdBfzCi1C2O29213mJV5biM-yen-Qkul000iGIGvQJl1yPhkh6ETvOTSXnkIVHt-.qUOx6PJy8At1Afg_

A Message from the Finance Committee About Donating

This fiscal year (July 1, 2024-June 30, 2025), Chapel Hill Friends Meeting is operating with a total operating budget of about \$77,000. This money is used to pay the bills, support our committees, keep the building functioning, and pay benevolences to outside organizations. The great majority of this spending—94% or about \$72,000, must be covered by your donations (the rest coming from parking for sporting events.)

We recognize that folks in our Meeting have different preferences for how frequently they give and at what times during the year. In the last two fiscal years, the finance committee has been concerned that we were not going to meet our budget goals and then found ourselves in a fundraising crunch. In an attempt to avoid this, the Finance committee encourages folks to give more consistently throughout the year and start earlier giving during this first half of our fiscal year if that is possible in your own budgeting process. Thank you for your commitment to helping our Meeting run as smoothly as possible.

To donate there are several options. There is a box in the foyer for checks made out to CHFM, and cash. You can also send a check to the Treasurer, CHFM, 531 Raleigh Road, Chapel Hill 27514. If you prefer to donate online, please go to our website home page at www.chapelhillfriends.org and click the “donate” button at the upper right corner. The donate button will also guide you to other ways you can give, including how the more “seasoned” (over-70 ½) folks among us can make fully tax-deductible gifts directly from an IRA.

Bequests to the CHFM

Many of you have likely heard pitches on PBS or other charitable organizations asking you to include them in your estate plans. The Finance committee wants to remind folks that you can do the same thing for our Meeting!

Read the Finance Committee’s complete, newly revised [estate planning guide](#).



Recurring Announcements

InterFath Council Committee Is Seeking Volunteers

We invite anyone interested in becoming, or knowing more about being an IFC Committee Member to please contact Carolyn White.

We welcome volunteers to help with food preparation and service at ICF every second Thursday for lunch: 10a - 1p, and/or every second Friday for dinner 4p-6:30p. Volunteers are welcome for part of the shift, or the full shift.

Zoom Tech Hosts Wanted

Support Chapel Hill Friends Meeting's Zoom worship and forums by becoming a tech host. The role is much more simple than you would imagine. Trust us! We need your help and will train you. Please contact the Zoom Subcommittee if interested, or have questions:

zoom@chapelhillfriends.org.

Inter-Faith Council Pantry Needs Donated Food Items

Please consider IFC's needs when doing your shopping. There is a basket in the meetinghouse foyer for food donations. IFC has requested the following food items: coffee, hot chocolate, canned protein, canned pork and beans, canned soup (not vegetable), boxed cereal, cake mixes, instant foods, ramen noodles. Thank you!

FRIENDS, PLEASE LIMIT YOUR WEEKDAY MEETINGHOUSE VISITS.

The CFS Early School teachers, parents and guests have priority use of the meetinghouse parking lot from 7:30 AM to 6:00 PM Monday through Friday throughout the calendar year. If you must visit the meetinghouse during weekday hours, please alert John Hite, the Meetinghouse Resident, at least one day ahead. Email: johnthequaker@gmail.com or call: 919-929-5377.

Newsletter & eNews Reminder

Please send items for the weekly eNews email and the monthly print Newsletter to news@chapelhillfriends.org.

- The deadline for weekly eNews is *Wednesday* 6 pm.
- The deadline for the monthly print Newsletter is on the *last day of the month*.

To unsubscribe, email to news@chapelhillfriends.org with the subject line, Unsubscribe.

Note: If you think that you haven't received your weekly enews or monthly newsletter, it helps to add news@chapelhillfriends.org to your contacts. Otherwise it might go to your Spam folder (and likewise for other chapelhillfriends.org mailing lists such as pfym@chapelhillfriends.org).



Recurring Events

Prayers for Healing/Holding in the Light, 2nd and 4th Wednesday, 7-8:30 pm

YOU ARE INVITED TO PARTICIPATE IN Virtual Prayers for Healing/Holding in the Light on the 2nd and 4th Wednesday of each month, 7:00 to 8:30 PM. Join us when you can for as long as you wish - from your own home.

Do you have a name or a group of people to add to - or remove from - the list of those we will hold in our hearts and prayers? If so, please send to: prayers@chapelhillfriends.org. The list of names to be held in the Light will be renewed each month. Names must be resubmitted each month to be maintained on the list. We'll send an updated list on Wednesday afternoons. Thank you for joining us!

This virtual prayer service continues under the care of the Care and Counsel Committee and each week, a committee member will collect and post the names that are submitted and will read them aloud during the time of the service.

Meeting for Worship with Attention to Peace in Palestine. Thursdays, 5:30pm

Betsy Brinson shares with Friends:

You are invited to join Meeting for Worship with Attention to Peace in Palestine and Israel at 5:30 p.m. ET / 2:30 p.m. PT. We will continue to meet weekly on Thursdays at this time, at least through the months of January and February, or until a permanent ceasefire is reached.

Join on Zoom:

<https://afsc-org.zoom.us/j/85831333364?pwd=VEtPTUZuYk5hTHV2OGs1VzRkY0ZKUT09>

Meeting ID: 858 3133 3364

Passcode: 759311

Pendle Hill Worship via Zoom, Daily, 8:30-9:10am

Pendle Hill Quaker Study, Retreat, and Conference Center is now opening their daily morning worship to everyone, by way of Zoom or phone. A lovely opportunity for gathered worship every morning. “A handful of Pendle Hill residents continue to gather daily in the Barn – from 8:30am to 9:10am Eastern Time – expanding the 90-year-long tradition of daily worship here on campus. Beginning the week of March 16, 2020, we started an experiment of opening the circle of worship to YOU in your home. You can join us here via Zoom.”

<https://pendlehill.org/explore/worship/join-us-online-for-worship-in-the-barn/?bblinkid=210290749&bbemailid=19903873&bbejrid=1408822779>

Note: The above link takes you *not* to the meeting but to a page of general instructions. Look for the sentence “You can join us via Zoom **here**, or by clicking on the image below.”

Pray for Peace - From Friends House Moscow, Daily

Link to the Daily Meeting for Worship for Peace sponsored by FHM/FHMSA: (Friends House Moscow)

Join Zoom Meeting

<https://us02web.zoom.us/j/4165005614?pwd=NUtieEtqbDBYbjBrcGdMMzBKQ3drQT09>

Meeting ID: 416 500 5614

Passcode: 182805

The room opens at 8:45am Pacific time (10:45 EST); worship begins on the hour and ends an hour later. After worship there will be time to share brief thoughts that did not rise to the level of ministry. You may also want to rename yourself indicating your geographic location. There will be no audible indicator when one enters or leaves, and everyone will be muted on entry. Please leave yourself muted unless giving ministry.

Ministry may also be shared in the chat, but it is not the place for private conversations. If you are new to Quaker unprogrammed worship and wish to talk with someone about it, send a message to the host and someone can join you in a breakout room.



Personals

Afghan Friends Looking for New Apartment

Some of you know Samir and Reema who moved to Raleigh as refugees from Kabul (via Kurdistan) last summer. They now have a second child Mustafa to join their adorable Aida, and they are looking for an apartment or house with some outdoor space and more natural lighting/sunlight. They're on the lookout for a 2 BR, \$1,300/month max rent accommodation within 30 minutes of downtown Raleigh (Samir is a Masters' student at NC State). They have a sound track record of paying rent within the first three days of each month. Please reach out to Samir directly (919-328-0806, msamir.omary@gmail.com), if you have any leads or ideas.

Help Wanted for Two Students from Gaza

Naveed Moeed shares with Friends:

Guilford College evacuated 2 students from Gaza and they just got here last week. They are MBA students and really nice people. That being said we're fundraising and gathering stuff to set up their house so if you can support both or either would appreciate it ❤️ the best support is of course amplifying this with your network of friends and family!

GoFundMe: <https://gofund.me/69cd2cf1>

SoKindRegistry: <https://sokindregistry.org/registry/29382#>

If \$\$ is not something you can spare checkout the in kind registry maybe you have some furniture lying around you can help them with.



Business Meeting Minutes

Chapel Hill Friends Meeting- Minutes for the Meeting for Worship with Attention to Business - 9/15/2024 online via Zoom

Ann Miller, Clerk, and Jennifer Leeman, Recording Clerk

Present: Quaker Harmon, Tom Munk, Margaret Vimmerstedt, Monteze Snyder, David Waterman, Allie Scales, Ann Miller, Jennifer Leeman, Susan Newcomer, Kate Fitch, Alice Carlton, Dave Curtin, Traci Hjelt Sullivan, Caroline White, Dottie Heninger, Tori Toles, Jan Hutton, Julia Cleaver, John Pilgrim, Joe Groves, Peter Malone, Colleen Fey, John Hite, Buzz Borchardt, Betsy Brinson, Carolyn Stuart, Tom Ludlow, Hank and Nancy Elkins, Wendy Michener, Rob Jones, Deborah Gibbs, Paul Munk, Max Drake, Emilie Condon, Nancy Milio, John Bell

1. We opened with worship and this month's query: Is the spirit of our worship together one that nourishes all worshipers?

2. The minutes of the August 2024 Meeting for Worship with Attention to Business were approved as written. with two small editorial changes.

3.a. Monteze Snyder, Treasurer, presented the FY 2023-24 financial reports. She presented four reports.

Report 1. We have a new treasurer and new accountant. Monteze presented a detailed report on what needed to be done to manage the transition, including details on the roles and responsibilities of both treasurer and accountant. She also summarized a number of tasks that are still in process related to incorrect filing of tax documents. Of note, we are now fully registered as a tax-exempt organization. (Appendix A)

Report 2. Monteze presented an overview of funds budgeted, revenues, and expenses over the 2023-2024 fiscal year. Although we were concerned about revenue in the first half of the year, revenue increased in the third quarter. Revenue from parking was also higher than anticipated. At the end of the year, revenue was 118% of budget. On the expense side, our insurance and taxes on parking (UBIT) were higher than expected and committee spending was lower than expected. Benevolences were 106% of budgeted because of money spent to correct underspending in the prior year. Overall, expenses were 91% of budget.

Report 3. Monteze also reviewed income and expenses related to our savings and investment accounts. (Appendix C).

Report 4. Monteze provided a detailed report of our overall financial position. (Appendix D).

3.b. David Waterman presented the finance committee annual report (Appendix E).

A Friend asked how to recommend a specific benevolence be added to the budget. The clerk clarified that there is a process to recommend new benevolences in the spring that is typically managed by Peace and Justice.

We accepted the reports of the treasurer and Finance Committee with appreciation for all of the work that the committee has invested over the past year.

4. Wendy Michener reported for Peace and Justice that two forums were held on an anti-apartheid pledge that American Friends Service Committee is supporting. Peace and Justice has been seasoning input from those forums and from members of the Meeting community. The Committee has determined that the Meeting is not yet clear to sign onto the pledge, largely due to concerns about some of the wording in the pledge. Peace and Justice will continue to season next steps on the pledge and may bring a minute forward in the future. Friends are encouraged to review the version of the pledge in the upcoming Meeting newsletter and continue to provide input to Peace and Justice. One Friend recommended a called Meeting for Worship to consider the pledge.

5. David Waterman, for Finance Committee, reminded Friends to consider including the Meeting in their estate planning. The Meeting website includes guidance to aid with making a bequest.

6. Next Meeting for Worship with Attention to Business is planned for 9:00 AM on 10/20/2024.

Announcements:

- The Piedmont Friends Fall gathering has been rescheduled to Saturday, 10/12/24, 11:00-3:00 at Bethabara Historic Park in Winston-Salem.
- A welcoming party for new member Hart Pillow will be held Saturday Sept 28 from 3-5 pm at Alice Carlton's house.
- The Clerks' retreat will be held Sunday, 10/6 1-3 pm in the meetinghouse.
- A Friend raised the issue that UNC now issues electronic IDs to students and there is a petition [One Card, One Vote - UNC must immediately print physical One Cards at no cost for all students by the start of Early Voting on October 17 - Action Network](#)

Appendix A.

Treasurer and Accountant Activities July 1, 2023-June 30, 2024

Initial projects:

- Migrated all data from former Treasurer's QuickBooks Desktop to QuickBooks Online (QBO)
- Set up QB Payroll with direct deposit of pay checks for First Day teachers and direct pay of payroll taxes
- System/software changes: Changed multiple software programs required for tracking contributions, receiving on-line donations, and managed connections to our accounting system and to the new bank.

Routines established:

Treasurer:

- Prepared and sent annual contribution statements to contributors
- Paid 2023 UBIT/[990-T taxes online](#) as required by IRS
- [PCI compliance with Global Payment](#) for our on-line donations
- Obtain Trustees approval for contracts (as needed)
- Monitor [policy compliance](#) based on monthly statements of financial position (monthly)
- Issue and mail accounts payable checks (weekly); post receipts and invoices in QBO and/or accountant/treasurer shared folders (50+ checks in FY 2023-2024)
- Obtain W-9s from contractors for annual issuance of Forms 1099 (ongoing)
- With Accountant, prepares IRS Form 990-T to report parking income and pay the UBIT tax online

Accountant regular tasks:

- Post general ledger (monthly, annually)
- Reconcile bank statements (monthly)
- Reconcile credit and debit cards with receipts (monthly)
- Run payroll via QuickBooks Payroll or other payroll software (monthly)
- Submit accounting system generated financial reports
- Prepare 1099s for contractors and individuals
- Prepares invoice for Stormwater and OWASA charges for Carolina Friends School

In process:

- Issues with IRS (ongoing):
 - Clarified CHFMs status as tax exempt with IRS (03/12/2024) and with MWAB
 - Handling problems with [IRS and 990-T tax payments](#) for 2021, 2022 and 2023 and provided documented correspondence to IRS. Multiple follow ups with IRS still ongoing
 - Handling IRS problems due to QB Payroll error in paying payroll taxes
- Applied for nonprofit rates for Zoom accounts and for our www platform Google for nonprofits
- Obtain [NCDOR sales tax exempt authorization](#) sales tax number so we can submit state sales tax refund

Appendix B.

Budget vs. Actuals: FY 2023 2024 - FY24 P&L						
July 2023 - June 2024						
	Actual	Budget	Over/(Under) Budget	% of Budget	% of expenses	budget
Revenue					73,941.95	
Contributions	88,747	76,306	12,441	116%		
Parking space rental	7,125	5,250	1,875	136%		
Total Revenue	95,872	81,556	14,316	118%		
Gross Profit	95,872	81,556	14,316	118%		
Expenditures						
A-Obligations			-			
Accountant	7,850	8,000	(150)	98%		
Bank Fee		50	(50)	0%		
FDS C coordinator/Childcare	7,234	8,000	(766)	90%		
Insurance	11,622	6,110	5,512	190%		
Software License Fee	1,356	1,600	(244)	85%		
Stormwater Fees	736	749	(13)	98%		
UBIT	3,472	387	3,085	897%		
Utilities	4,940	7,351	(2,411)	67%		
Zoom operator		2,400	(2,400)	0%		
Total A-Obligations	37,210	34,647	2,563	107%	0.50	0.42
B-Committees			-			
Adult Religious Ed		150	(150)	0%		
Building and Grounds	6,338	11,819	(5,481)	54%		
Care and Counsel		110	(110)	0%		
Meeting for Suffering		200	(200)	0%		
Total Care and Counsel	-	310	(310)	0%		
Children's/Youth Religious Ed		350	(350)	0%		
Communication Technology	300	800	(500)	37%		
Finance	738	1,400	(662)	53%		
Contingency Fund		300	(300)	0%		
Credit Card Fee	395	450	(55)	88%		
Total Finance	1,133	2,150	(1,017)	53%		
Friends Transition & Suppt-Yoke	600	600	0	100%		
Hospitality		415	(415)	0%		
IFC	150	150	-	100%		
Library	150	350	(200)	43%		
Ministry and Worship	521	1,000	(479)	52%		
Nominations		40	(40)	0%		
Peace and Justice		500	(500)	0%		
National Quaker Service		1,500	(1,500)	0%		
Total Peace and Justice	-	2,000	(2,000)	0%		
Publications and Communications		750	(750)	0%		
Total B-C ommittees	9,193	20,884	(11,691)	44%	12%	26%

D-Benevolences			-			
Legacy Benevolences	21,068	19,454	1,614	108%		
M&W Benevolences	1,300	1,400	(100)	93%		
P&J Benevolences	5,171	5,171	-	100%		
Total D-Benevolences	27,539	26,025	1,514	106%	37%	32%
Total Expenditures	73,942	81,556	(7,614)	91%		
Net Operating Revenue	21,930	-	21,930			

Appendix C.

Chapel Hill Friends Meeting				
Budget vs. Actuals: FY_2023_2024 - FY24 P&L				
July 2023 - June 2024				
	Total			
	Actual	Budget	Over/(Under) Budget	% of Budget
Other Revenue				
Misc Income	20,158.02		20,158.02	
Interest income	4,086.27		4,086.27	
Shotts payout	1,589.47		1,589.47	
Total Misc Income	25,833.76	-	25,833.76	
Total Other Revenue	25,833.76	-	25,833.76	
Other Expenditures				
Shotts Leadership	2,690.00		2,690.00	
Special Projects			-	
CHFM-CFS		-	-	
HVAC Stage 1	11,584.82	20,012.00	(8,427.18)	57.89%
Total Special Projects	11,584.82	20,012.00	(8,427.18)	57.89%
Total Other Expenditures	14,274.82	20,012.00	(5,737.18)	71.33%

Appendix D.

**Chapel Hill Friends Meeting
Statement of Financial Position**

As of June 30, 2024

	Total	
	As of Jun 30, 2024	2023 (PY)
ASSETS		
Current Assets		
Bank Accounts		
1-Checking Truist-2699	0.00	1,366.30
1. Unrestricted Checking 8698	0.00	64,948.92
2-Savings Truist-9737	0.00	56,136.74
3-Designated Renova Truist-4039	0.00	30,644.31
4-Designated Funds Truist-4593	0.00	1.49
Care and Counsel Support Funds	0.00	7,887.39
ReFac Support Funds	0.00	2,321.05
Shotts Leadership Support Funds	0.00	3,649.65
Youth Service Support Funds	0.00	4,116.25
Total 4-Designated Funds Truist-4593	\$ 0.00	\$ 17,975.83
Checking 5/3 Bank 1611	49,730.79	
Designated Building Renovation 5/3 Bank Savings 1678	26,165.37	
Designated ReFac, Youth, Care and Counsel 5/3 Savings 1686	10,311.70	
Designated Shotts Savings 5/3 Bank 1652	4,950.42	
Savings 5/3 Bank 1645	40,010.96	
Total Bank Accounts	\$ 131,169.24	\$ 171,072.10
Other Current Assets		
5/3 Bank CD	50,000.00	
FF- General Fund Designated	65,597.52	39,850.96
FF- Physical Plant Resrv Fund-D	42,448.63	38,026.71
Total Other Current Assets	\$ 158,046.15	\$ 77,877.67
Total Current Assets	\$ 289,215.39	\$ 248,949.77
Other Assets		
FF- Shotts Endowment Rst	41,546.89	38,685.84
Total Other Assets	\$ 41,546.89	\$ 38,685.84
TOTAL ASSETS	\$ 330,762.28	\$ 287,635.61
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
Payroll Liabilities	280.23	280.23
Federal Taxes (941/943/944)	-428.40	
Total Payroll Liabilities	-\$ 148.17	\$ 280.23
Total Other Current Liabilities	-\$ 148.17	\$ 280.23
Total Current Liabilities	-\$ 148.17	\$ 280.23
Total Liabilities	-\$ 148.17	\$ 280.23
Equity		
FF Unrealized Gain/Loss	32,772.21	22,706.54
Opening Balance Equity	134,376.03	134,376.03
Unrestricted Net Assets	130,272.81	100,734.66
Net Revenue	33,489.40	29,538.15
Total Equity	\$ 330,910.45	\$ 287,355.38
TOTAL LIABILITIES AND EQUITY	\$ 330,762.28	\$ 287,635.61

Appendix E.

FINANCE COMMITTEE ANNUAL REPORT July 1, 2023 - June 30, 2024

Introduction

The Finance Committee has responsibility for stewardship of the financial resources of Chapel Hill Friends Meeting, which allows the Meeting to continue its work. The goals of the Finance Committee are to support this stewardship by:

- a) Maintaining a balanced budget;
- b) Supporting the work of vital committees and providing support for designated Quaker organizations and other local entities approved by Meeting for Worship with Attention to Business (benevolences);
- c) Providing and monitoring the level of savings for routine and unanticipated repairs for our facilities and flexibility to cover contingencies; and
- d) Maintaining sufficient assets and savings to meet future needs.

The Treasurer provides oversight of the financial health of the Meeting. Working closely with our Accountant, the Treasurer maintains records of the financial transactions of the Meeting, and provides quarterly and annual reports to the Meeting for Worship and Attention to Business. While the roles of the Treasurer and the Finance Committee have been defined separately, we have in practice worked collaboratively. The Treasurer serves as an *ex officio* member of the Finance Committee.

Activities of the Finance Committee in 2023-24

Our routine activities included:

- Fundraising, collection of donations, and paying of Meeting obligations;
- Maintaining accounting of income and expenditures, the Meeting's bank and investment accounts, and the financial reserves for use in case of emergencies.
- Managing the Meeting's financial investments, including purchase in Spring, 2024 of a \$50,000 CD using excess cash in the Building Renovation Fund.
- Preparation of the Meeting's Annual Budget beginning in Spring of 2024. As part of this process, committees provided requests for funding of their planned activities for the upcoming fiscal year. Benevolence requests were also submitted by relevant committees. As usual, the budget was reviewed by MWAB in May and approved in June.

Among non-routine activities, we

- Transferred all of our checking and savings accounts to Fifth Third Bank following the difficult problems with fraudulent activities in our checking account (no money was lost), and generally poor service, at Truist. We have been pleased with Fifth Third to date.
- Based on competitive bids we solicited, changed our insurance carrier from Church Mutual to Guide One.
- Completed our first full year with a paid accountant (Peggy James, CPA) supporting our treasurer and committee.
- Changed, with the helpful cooperation of online contributors, our online donation service from VANCO to Servant Keeper to reduce costs and simplify donation processing.
- Revised and updated our stock donation information on the Meeting website,
- Supported the Meeting task force as they successfully re-negotiated the school building lease with Carolina Friends School.

As usual, The Treasurer reported to the Finance Committee monthly on income and expenses and worked with the Committee in the preparation of the 2023-2024 fiscal year report, the quarterly reports to the Meeting for Worship with Attention to Business, and the budget for the 2024-2025 fiscal year. The Treasurer kept on-going records to assist in our task. We use Quick Books Online to track our finances and we log contributions through Servant Keeper.

Commentary on FY2023-24 Financial Results

In this section, we lead up to our conclusion that the Financial Health of Chapel Hill Friends is good.

As we learned from the Treasurer's report, the Meeting's total ordinary income of \$95,872, including contributions of \$88,747, enabled (after subtracting our operating expenses) a positive net operating income of \$21,930 for FY2023-24. This outcome is a tribute to the generosity of contributors in our Meeting.

On the operating expenditure side, actual spending of only \$73,942 compared to budgeted spending of \$81,556 was in large part due to underspending by our committees, and also to savings resulting from our continued reliance on an unpaid volunteer zoom operator. This underspending gap was in spite of a near doubling of our insurance costs in 2023-24.

We turn now to "other" income and expenses, which just means outside of our operating budget. Total other revenues were \$25,834, and total other expenses \$14,274, resulting in a net other income of \$11,559. By far the largest component on the revenue side was a further display of

generosity in our Meeting in the form of a \$20,158 stock donation made in December, 2023. The dominant component on the spending side was \$11,585 for continuing work on Stage 1 of the HVAC project.

The Statement of Financial Position document provides a snapshot of all the Meeting’s assets and liabilities on a given day, thus permitting comparisons of overall fiscal health of the Meeting from one year to the next. Our total financial assets as of June 30, 2024 were \$330,762, but essentially all of the increase in those assets since June 30, 2023 were accounted for by growth of our Friends Fiduciary (FFC) investment funds. We thus focus on these investments, which as of June 30, 2024 accounted for approximately 45% of our total financial assets. (FFC is an investment non-profit founded by Quakers in 1898. It offers “socially responsible investment management consistent with Quaker values.”)

Table 1 provides details for the three FFC investment accounts held by the Meeting, each of which were 100% invested in FFC’s “Growth and Income Fund”, a diversified stock and bond fund. Overall growth in our three FFC accounts combined was 28.3%. Each of our three accounts increased in value, led by an 11.6% increase in the Growth and Income Fund in which they are invested.

Table 1
Changes of Value in the CHFM FFC Investment Funds
2023-24

Fund	30-Jun-23	30-Jun-24	% change
Shotts Endowment	38,685	41,547	7.4
General Fund Designated	39,851	65,598	64.6
Physical Plant Reserve Fund	38,027	42,449	11.6
Totals	116,563	149,594	28.3

The percentage growth in the three funds varies widely, however, first because all dividends are reinvested in The Physical Plant Reserve Fund and in the General Fund-Designated account, while all dividends are paid out to the Meeting for the Shotts account, leading to the relatively low growth in the principal held in that account. The far higher growth in the General Fund Designated account largely reflects the \$20,158 stock donation, which at the request of the donors, was deposited into that account.

As for the 11.6% rate of return in the FFC's Growth and Income Fund, we are satisfied with that even though the S&P 500 stock index rose by 22.7% over the same period. First, about 25% of the Growth and Income Fund is invested in bonds, whose prices declined substantially due to an increase in bond yields. Another 5% is invested in a real estate index fund, which was basically flat over the period. Also, investment returns for "Environmental, Social, and Governance" (ESG) stocks and bonds (which broadly represent much of the FFC's investment guidelines) tend to be somewhat lower than for the broader market.

As the Treasurer's report has indicated, the Meeting has a policy objective, as it has had in the past, of maintaining adequate balances in cash in its checking account to cover 2 months of its expenses, and enough in its savings account to cover one year of its obligations. These requirements were met during the FY2023-24 period. We currently have adequate funds in these accounts to meet the substantially higher "obligations" category of our budget in FY2024-25.

Financial Health of CHFM

Overall, the Finance Committee considers that the Meeting's financial health is **good**, and that our financial positions are sufficient to address our obligations and the leadings of the Meeting in FY2024-25. The Committee had some worries during the past year about whether contributions would be sufficient to meet our 2023-2024 operating budget. We brought this concern to the MWAB and to the Meeting at large. The community responded, both by helping us to revise the 2023-24 spending budget downward, but especially by making generous additional contributions, allowing us to end this year in a strong position.

As this is the second consecutive fiscal year that contributions have unexpectedly lagged behind until near the end of the year, the Finance Committee recommends, in the interest of caution, that our operating surplus of \$21,930 remain easily accessible in either a checking or a savings account during FY2024-25.**

Again on the positive side, however, we note that the healthy growth of our FFC accounts during the FY2023-24 period represents an important advance in the long-term financial security of Chapel Hill Friends Meeting.

**We would be remiss to not also caution that although we have paid all of our UBIT taxes in full and that we expect a positive outcome, the IRS has not yet officially cleared us from substantial potential fines stemming from delays in our payment of these taxes.

The Meeting's Schoolhouse Ad Hoc Committee and Carolina Friends School administrators worked together over 2023 and 2024 to assess and agree on a plan to address the Schoolhouse foundation remediation needs. CFS, as part of the ongoing lease agreement, will assume the costs of the remediation activities.

Finally, the Finance Committee is pleased to report that we have completed the 2023-24 fiscal year with clean, clear financial bookkeeping. It was a year of transitions, including: a new accountant, a new treasurer, a new bank, other system changes, and a new insurance carrier, as well as the lingering need to address fraud at our former bank. We are extremely grateful for the dedicated efforts of our treasurer, Monteze Snyder, and Peggy James, our accountant, for getting us to this happy situation.

The 2023-24 members of the Finance Committee were: Julia Cleaver, Daniel Hill, Tom Ludlow, Susan Newcomer, Mansir Petrie, Gwynne Pomeroy (Co-clerk), Monteze Snyder (Treasurer and *ex officio* member), and David Waterman (Co-clerk).

8/23/24

Chapel Hill Monthly Meeting of the Religious Society of Friends

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