

**Sunday, July 9, 2023**  
**Episcopal Church of the Atonement Vestry Meeting Minutes**

Final – Approved August 13, 2023

Time: Sunday, July 9, 2023, 1:02 p.m. to 1:53 p.m.  
Location: In-Person at Church of the Atonement and via Google Meet  
Present: Dave Beil (Warden), Natalie Archie (via Google Meet), Jennifer Ash, Richard Benson (via Google Meet), Charles Bonilla, Ann Cassidy (via Google Meet), Aaron Johnson, Rick Velon, Mike Trumbold (Treasurer), Michael Waltz (Clerk)  
Absent: Amanda Kim (Warden), Rufus Gonzales, Amanda Patrick,  
Guests: Deacon Scott Elliott, Matt Rodgers (Director of Operations and Communications), Juliet Stunkel (Outreach Guild)

Next Meeting: Sunday, August 13, 2023, 1:00 p.m. – in-person at Church of the Atonement and via Google Meet.

Dave Beil (Warden) called the meeting to order at 1:02 p.m. Deacon Scott offered a prayer. Dave asked those attending how they felt after the selection of Father Charles Everson as our new Rector.

Outreach Guild Charter/Name Change: Juliet Stunkel explained that the Outreach Guild is proposing changing the name to the Service and Social Justice Guild to more clearly identify its purpose. Prior to the meeting they gave the Vestry a draft charter intended to define how the Guild will work. After discussion the Vestry determined that more time was needed to consider the document and name change. No action was taken.

Pastoral Care: Prior to Father Puchalla’s departure a pastoral care team, led by Deacon Scott and including Will White, and Mother Anne Wrider, was set up. Deacon Scott reported that the congregation’s needs are being met and while he is unavailable for a short time in late July Will White will be taking the lead.

Review of June Meeting Minutes: **A motion was made** (Rick Velon) **and seconded** (Charles Bonilla) to approve the minutes. With no discussion or questions **the motion passed** with one abstention (Aaron Johnson).

Treasurer’s Report:

*June Statement of Financial Position:* Mike Trumbold reported that the Endowment Fund grew by \$86,846 with most of the gain attributable to a positive market adjustment. The Reserve Account had a modest net gain of \$272 despite a small negative market adjustment. *A copy of the full report is attached to these minutes.*

*June Statement of Activity:* During the month we raised \$3,650 from several fundraising events, and we received another insurance settlement check of \$6,908 because of the basement flooding. Parking income increased and pledges were over budget. For the month revenue was over budget by \$5,127. Although there was nothing remarkable for the month total expenditures were over budget by \$5,047. *A copy of the full report is attached to these minutes.*

*Second Quarter Review/2023 Budget Update:*

Second quarter pledges are slightly under what was anticipated but Mike feels it isn’t a concern because it appears to be timing. The second quarter giving statements have been distributed. He pointed out some adjustments to the budget and noted the anticipated small deficit for the year. **A motion was made** (Charles Bonilla) **and seconded**

(Aaron Johnson) to receive the financials. With no further discussion or questions **the motion passed** unanimously.

#### Buildings and Property Guild/S4

The Guild's June meeting was rescheduled for the week of July 9th. Dave Beil reported that they met with Elevate about the professional energy audit needed for the Climate Infrastructure Fund grant; a response is expected shortly.

#### Other Reports

*Outreach:* There was no June meeting but the Guild provided the Vestry with a written report of activities. Atonement was well represented at ECRA's Juneteenth service and at the Pride Parade. The Guild received an Episcopal Charities grant to help fund a Community Needs Assessment with ECRA and Atonement will be a part of this year's Open House Chicago October 14-15. The Guild is planning a drive for Chiapas scholarships and Swift School probably in late July and early August.

*Block Party:* There was no formal report for the Block Party but things are progressing well.

*Fundraisers:* Aaron Johnson reported that the Pride event at Jarvis Tavern raised \$1,700. Dave Beil said that all the tickets were sold for the Kieckhefer/Newman dinner on July 22nd. Planned August fundraising events include the Kim House Concert on August 4th and the fundraiser for the Block Party; both are now included on the Atonement website.

*Parish Life Guild and Realm:* The Guild did not hold a June meeting.

#### Other Business for Future

Dave Beil reported that plans are being made for Father Charles Everson's arrival and later installation but details are not yet available. There was a brief discussion for a possible fall Vestry retreat; planning will begin after Father Charles arrives.

Dates for Calendar:

- Kieckhefer/Newman Dinner Fundraiser – July 22
- Dave Beil Vacation – July 20-29
- Church as Transformation "Regathering" – August 1
- Kim House Concert Fundraiser – August 4
- Amanda Kim Vacation – August 5-19
- Next Vestry meeting – August 13 in person at Church of the Atonement and via Google Meet
- Block Party – August 26
- Father Charles' first Sunday – August 27

The meeting adjourned at 1:53p.m.

Respectfully submitted,  
*Michael Waltz*  
*Clerk of the Vestry*

**The Church of the Atonement**  
**Statement of Financial Position**  
**As of June 30, 2023**

	As of Jun 30	As of May 31	Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Bank Accounts</b>			
Capital Campaign CD 4.85%. (11/29/2024)	101,845.27	101,579.50	265.77
Columbarium CD 4.7%. (11/24/2023)	40,950.65	40,775.03	175.62
Columbarium Money Market	11,538.16	11,537.88	0.28
Education Fund	33,440.67	33,439.82	0.85
Money Market	17,289.27	17,288.84	0.43
Music Account	2,176.74	936.74	1,240.00
Operating Account	26,653.38	26,247.00	406.38
Operating Savings	103,112.99	103,110.42	2.57
Rector Discretionary	4,978.39	4,978.39	0.00
Vestry Fund	133.00	133.00	0.00
<b>Total Bank Accounts</b>	<b>\$ 342,118.52</b>	<b>\$ 340,026.62</b>	<b>\$ 2,091.90</b>
<b>Other Current Assets</b>			
Endowment Fund	2,161,069.76	2,074,223.96	86,845.80
Reserve Account	15,764.88	15,492.58	272.30
<b>Total Other Current Assets</b>	<b>\$2,176,834.64</b>	<b>\$2,089,716.54</b>	<b>\$ 87,118.10</b>
<b>Total Current Assets</b>	<b>\$2,518,953.16</b>	<b>\$2,429,743.16</b>	<b>\$ 89,210.00</b>

**Commentary:**

In June there was quarterly interest reported in our two CDs.

Our Endowment Fund grew by a net of \$86,845.80. There was a positive market adjustment of \$86,212.32, income of \$583.48 and a memorial gift of \$50. received. The Reserve Account had a net gain of \$272.30 which included interest of \$282.73 and a negative market adjustment of \$10.43.

The Church of the Atonement

Statement of Activity

June 2023

	June Actual	June Budget	YTD Actual	YTD Budget	2023 Budget
<b>Revenue</b>					
<b>Building Use</b>					
AA	297.00	500.00	2,283.00	3,000.00	6,000.00
Building Tours	0.00	0.00	0.00	0.00	50.00
Donations (Apt., Elections), Building Use	3,333.33	3,333.33	18,666.00	24,199.32	44,199.30
Funeral/Wedding/Baptism Donations	0.00	0.00	2,375.00	0.00	3,000.00
Rectory Utilities	350.00	350.00	2,100.00	2,100.00	4,200.00
<b>Total Building Use</b>	<b>\$ 3,980.33</b>	<b>\$ 4,183.33</b>	<b>\$ 25,424.00</b>	<b>\$ 29,299.32</b>	<b>\$ 57,449.30</b>
<b>Catechesis</b>					
Adult Formation	0.00	0.00	0.00	1,195.00	1,400.00
Children's Formation	0.00	0.00	0.00	992.67	2,375.00
<b>Total Catechesis</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 2,187.67</b>	<b>\$ 3,775.00</b>
<b>Fundraising</b>					
Chi-Town Jazz Fest	0.00	0.00	7,861.00	7,800.00	7,800.00
Other Fundraising Events	3,650.00	0.00	9,850.00	6,200.00	24,662.00
<b>Total Other Fundraising Events</b>	<b>\$ 3,650.00</b>	<b>\$ 0.00</b>	<b>\$ 9,850.00</b>	<b>6,200.00</b>	<b>24,662.00</b>
Parish Life Events	0.00	0.00	0.00	0.00	400.00
<b>Total Fundraising</b>	<b>\$ 3,650.00</b>	<b>\$ 0.00</b>	<b>\$ 17,711.00</b>	<b>\$ 14,000.00</b>	<b>\$ 32,862.00</b>
<b>Other Receipts</b>					
Candles	0.00	0.00	513.00	513.00	1,113.00
Coffee Hour	5.00	0.00	72.00	0.00	400.00
Columbarium - Niche/Plaque	0.00	0.00	6,900.00	6,700.00	11,900.00
Evensong	0.00	0.00	371.72	200.00	450.00
Flowers	0.00	0.00	375.00	0.00	750.00
Hospitality	0.00	0.00	475.00	0.00	0.00
Interest Earned	4.77	10.83	12.56	64.98	130.00
Lessons & Carols	0.00	0.00	0.00	0.00	500.00
Miscellaneous	7,253.02	7,000.00	36,266.75	24,966.71	27,966.71
Outreach	0.00	0.00	50.00	0.00	0.00
Parking	2,289.64	1,700.00	9,106.68	10,200.00	20,400.00
<b>Total Other Receipts</b>	<b>\$ 9,552.43</b>	<b>\$ 8,710.83</b>	<b>\$ 54,142.71</b>	<b>\$ 42,644.69</b>	<b>\$ 63,609.71</b>
<b>Special Offerings</b>					
All Souls	0.00	0.00	0.00	0.00	650.00
Ash Wednesday	0.00	0.00	122.00	112.00	112.00
Christmas Offering	0.00	0.00	230.00	0.00	5,500.00
Easter Offering	0.00	0.00	2,100.00	2,100.00	2,100.00
Easter Vigil	0.00	0.00	1,517.00	1,500.00	1,500.00
Good Friday	0.00	0.00	335.00	300.00	300.00
Maundy Thursday	0.00	0.00	861.00	860.00	860.00
Palm Sunday	0.00	0.00	0.00	0.00	0.00
Pentecost	0.00	0.00	0.00	0.00	0.00
Thanksgiving Offering	0.00	0.00	0.00	0.00	300.00
<b>Total Special Offerings</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 5,165.00</b>	<b>\$ 4,872.00</b>	<b>\$ 11,322.00</b>
<b>Weekly Offering</b>					
Next Year Pledges	0.00	0.00	0.00	0.00	5,000.00
Open Plate Offerings	2,503.37	4,000.00	28,476.95	24,000.00	48,000.00
Pledges -VANCO	9,064.67	16,250.00	50,871.71	97,500.00	195,000.00

	June Actual	June Budget	YTD Actual	YTD Budget	2023 Budget
Pledges from Plate	24,547.12	15,026.66	133,127.72	90,159.96	180,319.92
Prior Year Pledges	0.00	0.00	10,149.06	10,300.00	10,300.00
<b>Total Weekly Offering</b>	<b>\$ 36,115.16</b>	<b>\$ 35,276.66</b>	<b>\$ 222,625.44</b>	<b>\$ 221,959.96</b>	<b>\$ 438,619.92</b>
<b>Total Revenue</b>	<b>\$ 53,297.92</b>	<b>\$ 48,170.82</b>	<b>\$ 325,068.15</b>	<b>314,963.64</b>	<b>607,637.93</b>
<b>Expenditures</b>					
<b>Accounting/Legal</b>					
Bank Fees	65.00	108.33	543.00	650.02	1,300.00
Banking Supplies	127.94	130.00	341.79	130.00	250.00
NSF	0.00	0.00	0.00	0.00	200.00
Professional Fees	0.00	0.00	575.00	575.00	1,000.00
Vanco Fees	137.73	125.00	653.63	750.00	1,500.00
<b>Total Accounting/Legal</b>	<b>\$ 330.67</b>	<b>\$ 363.33</b>	<b>\$ 2,113.42</b>	<b>\$ 2,105.02</b>	<b>\$ 4,250.00</b>
<b>Building Expenses</b>					
<b>Building Maintenance Supplies</b>					
Church & Parish House	181.00	180.00	770.00	769.00	6,000.00
Rectory	0.00	0.00	0.00	0.00	4,500.00
<b>Total Building Maintenance Supplies</b>	<b>\$ 181.00</b>	<b>\$ 180.00</b>	<b>\$ 770.00</b>	<b>\$ 769.00</b>	<b>\$ 10,500.00</b>
<b>Building Services/Repairs</b>					
Church & Parish House	1,102.85	898.33	11,056.55	5,064.98	10,194.99
Rectory	0.00	0.00	2,358.81	500.00	4,500.00
<b>Total Building Services/Repairs</b>	<b>\$ 1,102.85</b>	<b>\$ 898.33</b>	<b>\$ 13,415.36</b>	<b>\$ 5,564.98</b>	<b>\$ 14,694.99</b>
Commercial Insurance	0.00	0.00	21,113.50	21,113.50	42,318.00
<b>Utilities</b>					
<b>Electric</b>					
Church & Parish House	732.75	875.00	5,138.91	5,250.00	10,500.00
Rectory	211.41	250.00	1,454.42	1,500.00	3,000.00
<b>Total Electric</b>	<b>\$ 944.16</b>	<b>\$ 1,125.00</b>	<b>\$ 6,593.33</b>	<b>\$ 6,750.00</b>	<b>\$ 13,500.00</b>
<b>Gas</b>					
Church & Parish House	1,857.00	1,860.00	11,791.00	11,160.00	22,320.00
Rectory	596.85	600.00	8,388.64	6,600.00	13,800.00
<b>Total Gas</b>	<b>\$ 2,453.85</b>	<b>\$ 2,460.00</b>	<b>\$ 20,179.64</b>	<b>\$ 17,760.00</b>	<b>\$ 36,120.00</b>
<b>Water &amp; Sewer</b>					
Sewer Treatment/Reclamation	0.00	0.00	216.83	216.83	216.83
Water/Sewer/Garbage - Church	0.00	20.00	19.00	80.00	200.00
Water/Sewer/Garbage - Parish House	433.20	433.20	3,051.40	2,599.20	5,198.40
<b>Total Water &amp; Sewer</b>	<b>\$ 433.20</b>	<b>\$ 453.20</b>	<b>\$ 3,287.23</b>	<b>\$ 2,896.03</b>	<b>\$ 5,615.23</b>
<b>Total Utilities</b>	<b>\$ 3,831.21</b>	<b>\$ 4,038.20</b>	<b>\$ 30,060.20</b>	<b>\$ 27,406.03</b>	<b>\$ 55,235.23</b>
<b>Total Building Expenses</b>	<b>\$ 5,115.06</b>	<b>\$ 5,116.53</b>	<b>\$ 65,359.06</b>	<b>\$ 54,853.51</b>	<b>\$ 122,748.22</b>
<b>Catechesis Expenses</b>					
Adult Formation	0.00	0.00	1,195.00	1,195.00	1,400.00
Children's Formation	0.00	0.00	991.53	992.67	2,375.00
<b>Total Catechesis Expenses</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 2,186.53</b>	<b>\$ 2,187.67</b>	<b>\$ 3,775.00</b>
<b>Diocese</b>					
Convention	0.00	0.00	0.00	0.00	500.00
Diocesan Apportionment	1,562.00	1,562.50	9,372.00	9,375.00	18,750.00
Other Diocesan Expenses	-16.00	0.00	10.00	0.00	0.00
<b>Total Diocese</b>	<b>\$ 1,546.00</b>	<b>\$ 1,562.50</b>	<b>\$ 9,382.00</b>	<b>\$ 9,375.00</b>	<b>\$ 19,250.00</b>
Endowment Guild (Legacy Society)	0.00	0.00	0.00	0.00	1,000.00
<b>Fundraising Expenses</b>					
Chi-Town Jazz Festival	0.00	0.00	0.00	0.00	6,600.00
Other Fundraising Events	0.00	0.00	0.00	0.00	9,662.00
Parish Life Events	0.00	0.00	0.00	0.00	500.00

	June Actual	June Budget	YTD Actual	YTD Budget	2023 Budget
<b>Total Fundraising Expenses</b>	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 16,762.00
<b>Music</b>					
Choir	5,100.00	5,000.00	29,455.00	27,725.00	43,300.00
Music Library	0.00	0.00	1,388.13	1,000.00	1,000.00
Organ Repairs	0.00	0.00	815.00	680.00	3,000.00
Special Events	548.45	0.00	-1,943.96	0.00	0.00
<b>Total Music</b>	\$ 5,648.45	\$ 5,000.00	\$ 29,714.17	\$ 29,405.00	\$ 47,300.00
<b>Office Supplies</b>					
Computer Software	0.00	0.00	11.99	0.00	250.00
Janitorial Supplies	558.41	208.33	3,518.57	1,249.98	2,500.00
Kitchen Supplies	52.92	140.00	432.12	140.00	750.00
Office Supplies	587.44	0.00	2,428.31	0.00	1,750.00
Postage	0.00	0.00	25.20	0.00	250.00
Printing	0.00	0.00	192.23	0.00	250.00
<b>Total Office Supplies</b>	\$ 1,198.77	\$ 348.33	\$ 6,608.42	\$ 1,389.98	\$ 5,750.00
<b>Office/Parish Expenses</b>					
Advertising	0.00	0.00	270.00	170.00	400.00
Coffee/Water Service	288.78	275.00	460.62	650.00	900.00
Columbarium Expenses	0.00	0.00	0.00	0.00	750.00
<b>Copier</b>					
Click Charges	0.00	0.00	308.03	150.00	150.00
Copier Lease	0.00	515.50	3,379.68	3,093.00	6,186.00
<b>Total Copier</b>	\$ 0.00	\$ 515.50	\$ 3,687.71	\$ 3,243.00	\$ 6,336.00
Dues & Subscriptions	317.00	516.66	4,220.50	3,100.04	6,200.00
Hospitality	0.00	0.00	325.85	0.00	1,000.00
Media/Communications	0.00	0.00	0.00	0.00	2,500.00
Stewardship	0.00	0.00	0.00	0.00	1,000.00
Website	0.00	0.00	0.00	0.00	300.00
<b>Total Office/Parish Expenses</b>	\$ 605.78	\$ 1,307.16	\$ 8,964.68	\$ 7,163.04	\$ 19,386.00
<b>Outreach Expenses</b>	672.78	612.00	5,812.96	3,672.00	18,750.00
<b>Personnel</b>					
<b>403(b) - Match</b>					
Lay	20.00	20.00	120.00	120.00	240.00
<b>Total 403(b) - Match</b>	\$ 20.00	\$ 20.00	\$ 120.00	\$ 120.00	\$ 240.00
Assisting Clergy	0.00	0.00	0.00	0.00	0.00
Gross Salaries	26,900.56	24,425.15	149,484.15	146,550.90	293,101.86
Health Insurance	2,729.00	2,729.00	16,374.00	16,374.00	32,748.00
Health Savings Account	0.00	0.00	3,000.00	3,000.00	6,000.00
Insurance - Workers Compensation	0.00	0.00	3,090.00	3,090.00	3,090.00
Medicare (employer)	295.28	250.00	1,586.44	1,500.00	3,000.00
Payroll Service	146.00	115.00	1,207.50	1,100.50	1,790.50
<b>Pension Premiums</b>					
Clergy	1,266.77	1,330.00	7,600.62	8,253.17	16,233.17
Lay	752.04	753.00	4,512.24	4,518.00	9,036.00
<b>Total Pension Premiums</b>	\$ 2,018.81	\$ 2,083.00	\$ 12,112.86	\$ 12,771.17	\$ 25,269.17
Rector Continuing Education	0.00	0.00	0.00	0.00	1,500.00
Rector Expense & Hospitality	0.00	0.00	0.00	0.00	1,000.00
Rector Travel Expenses	0.00	0.00	0.00	0.00	150.00
Self Employment Tax Allowance	500.12	500.12	2,989.73	3,000.72	6,001.44
Social Security (employer)	1,262.50	1,070.00	6,783.37	6,420.00	12,840.00
<b>Total Personnel</b>	\$ 33,872.27	\$ 31,192.27	\$ 196,748.05	\$ 193,927.29	\$ 386,730.97
Rector Discretionary Expenses	0.00	0.00	0.00	57.00	1,000.00

	June Actual	June Budget	YTD Actual	YTD Budget	2023 Budget
Search Committee	1,403.23	0.00	2,011.31	0.00	10,000.00
Telephone & Internet					
Landline Equipment Lease	200.01	200.01	1,210.15	1,220.24	2,420.30
Landline Service	227.63	227.63	1,365.78	1,365.78	2,731.56
Rector's Cell Phone	115.00	115.00	675.50	680.00	1,370.00
<b>Total Telephone &amp; Internet</b>	<b>\$ 542.64</b>	<b>\$ 542.64</b>	<b>\$ 3,251.43</b>	<b>\$ 3,266.02</b>	<b>\$ 6,521.86</b>
Worship/Altar Guild					
Christmas Decorations	0.00	0.00	524.56	0.00	350.00
Easter Decorations	0.00	0.00	58.36	680.00	680.00
Flowers	0.00	0.00	1,675.13	500.00	1,250.00
Vestments	0.00	50.00	658.25	300.00	600.00
Wine/Bread	406.50	200.00	1,430.90	1,200.00	2,400.00
<b>Total Worship/Altar Guild</b>	<b>\$ 406.50</b>	<b>\$ 250.00</b>	<b>\$ 4,347.20</b>	<b>\$ 2,680.00</b>	<b>\$ 5,280.00</b>
<b>Total Expenditures</b>	<b>\$ 51,342.15</b>	<b>\$ 46,294.76</b>	<b>\$ 336,499.23</b>	<b>\$ 310,081.53</b>	<b>\$ 668,504.05</b>
<b>Net Operating Revenue</b>	<b>\$ 1,955.77</b>	<b>\$ 1,876.06</b>	<b>-\$ 11,431.08</b>	<b>\$ 4,882.11</b>	<b>-\$ 60,866.12</b>
Other Revenue					
Other Ordinary Income	0.00	2,000.00	12,000.00	12,000.00	25,000.00
Transfer from Endowment Fund	0.00	0.00	21,000.00	21,000.00	21,000.00
<b>Total Other Revenue</b>	<b>\$ 0.00</b>	<b>\$ 2,000.00</b>	<b>\$ 33,000.00</b>	<b>33,000.00</b>	<b>46,000.00</b>
<b>Net Other Revenue</b>	<b>\$ 0.00</b>	<b>\$ 2,000.00</b>	<b>\$ 33,000.00</b>	<b>33,000.00</b>	<b>46,000.00</b>
<b>Net Revenue</b>	<b>\$ 1,955.77</b>	<b>\$ 3,876.06</b>	<b>\$ 21,568.92</b>	<b>37,882.11</b>	<b>-14,866.12</b>

**Commentary:**

**Revenue:** We raised \$3,650 through fundraising in June - Pride Happy Hour, Block Party, Newman Dinner and second House Concert. Under "Other Receipts Miscellaneous" there was another reimbursement check (\$6,908) for the basement flood. Our parking income was \$589.64 over budget. If you combine both plate and VANCO pledge numbers we were \$2,335.15 over budget in pledges.

Total Revenue for June was over budget by \$5,127.10.

**Expenses:** Total Building Expenses were below budget by \$1.47. Under Diocese, the \$16 credit is a refund for a nursery candidate background checks. Search Committee expenses in June were for two of the three hotel accommodations and the subscription for Zoom which we have kept specifically for the Search Committee. Total Expenditures were over budget by \$5,047.39.

We ended June with a positive \$1,955.77.