



**Katrina Martinez**  
Deputy Clerk

# Pima County Clerk of the Board


**Melissa Manriquez**

Administration Division  
33 N. Stone Avenue, Suite 100  
Tucson, AZ 85701  
Phone: (520)724-8449 • Fax: (520) 222-0448

Management of Information & Records Division  
1640 East Benson Highway  
Tucson, Arizona 85714  
Phone: (520) 351-8454 • Fax: (520) 791-6666

## MEMORANDUM

TO: Honorable Chair and Board Members  
Pima County Board of Supervisors

FROM: Melissa Manriquez, Clerk of the Board 

DATE: December 11, 2024

RE: Petition for Relief of Real Property Taxes – Santa Cruz Valley United Methodist Church

Pursuant to A.R.S. §42-11109(E), Santa Cruz Valley United Methodist Church, filed a petition on September 26, 2024, for relief of their Real Property Taxes for Parcel No. 304-15-020D for tax year 2023.

Pending Tax Payments:

<u>Parcel No.</u>	<u>Year</u>	<u>Taxes Due</u>	<u>Interest</u>	<u>Fees/Penalties</u>	<u>Total</u>
304-15-020D	2023-1	\$ 808.18	\$ 21.55	\$0.00	\$ 829.73
304-15-020D	2023-2	<u>\$3,941.77</u>	<u>\$367.90</u>	<u>\$0.00</u>	<u>\$4,309.67</u>
<b>Total</b>		<b>\$4,749.95</b>	<b>\$389.45</b>	<b>\$0.00</b>	<b>\$5,139.40</b>

The Assessor's review indicated that had the affidavit been filed in a timely manner, the Assessor would have granted the exemption. The purchase date of July 10, 2023, would have made them eligible only for 50% consideration per current office policy.

/mm

Attachments

- Notice of Hearing
- Assessor's Review Form
- Treasurer's Tax Report
- Santa Cruz Valley United Methodist Church submission



# Pima County Clerk of the Board

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December 5, 2024

Santa Cruz Valley United Methodist Church  
Attn: Sally F. Rankin, Finance Chairman  
50 E. Duval Road  
Green Valley, AZ 85614

RE: Petition for Relief of Taxes – Tax Parcel No. 304-15-020D

Dear Ms. Rankin:

Please be advised that your Petition for Relief of Real Property Taxes for tax year 2023, has been scheduled before the Pima County Board of Supervisors on Tuesday, December 17, 2024, at 9:00 a.m., or thereafter, at the following location:

Pima County Administration Building  
Board of Supervisors Hearing Room  
130 W. Congress, 1st Floor  
Tucson, AZ 85701

If you have any questions regarding this hearing, please contact this office at (520)724-8449.

Sincerely,

A handwritten signature in black ink, appearing to read "Melissa Manriquez".

Melissa Manriquez  
Clerk of the Board

/mm



# Pima County Clerk of the Board

Melissa Manriquez

**Katrina Martinez**  
Deputy Clerk

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33 N. Stone Avenue, Suite 100  
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Phone: (520) 351-8454 • Fax: (520) 791-6666

## Petition to the Board of Supervisors - Review Form

Pursuant to        A.R.S. §42-11104(G) (educational/library property) or  
  ✓   A.R.S. §42-11109(E) (religious property)

Taxpayer Santa Cruz Valley United Methodist Church

For tax year(s) 2023 - Parcel No. 304-15-020D

- 1) Did the organization file an affidavit as required by A.R.S. §42-11153?  
       Yes        ✓   No
  
- 2) Was the affidavit filed on or before March 1 of the tax year as required by A.R.S. §42-11153?  
       Yes        ✓   No
  
- 3) If the affidavit had been filed timely, would the Assessor have granted the exemption?  
  ✓   Yes             No
  
- 4) If the answer to Number 3 is "No", why was the exemption denied?  
       The required ownership of the property was not in effect during the time period required by statute.  
       The property was not being used for the exempt purpose during the time period required by statute.  
       The requesting church, educational or library property did not furnish the required documents requested by the Assessor at the time of application per A.R.S. §42-11152(3)&(B)  
  ✓   Other: Purchase date of 07/10/2023 would have made them eligible  
only for 50% consideration per current office policy.

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Completed by: Lisa Smith Date: 09/27/2024

c: Honorable Suzanne Droubie, Pima County Assessor



**PIMA COUNTY TREASURER'S OFFICE**

240 North Stone Avenue · Tucson AZ, 85701-1199  
Phone (520) 724-8341

*Chris Ackerley*  
*Pima County Treasurer*

**ACCOUNT BALANCE**

SANTA CRUZ VALLEY UNITED METHODIST  
50 E DUVAL RD  
GREEN VALLEY AZ 85614-4153

ACCOUNT: 30415020D  
PROPERTY TYPE: Real Estate  
PROPERTY LOCATION: 50 E DUVAL RD  
LEGAL DESC: GREEN VALLEY FARMS PTN N290' IN NW COR BLK 1

**Account Balance as of November 27, 2024**

Tax Year	Cert No	Interest Date	Interest Percent	Amount	Interest Due	Fees Due	Penalties Due	Total Due
2023 - 1		9/25/2024	16.0	808.18	21.55	0.00	0.00	829.73
2023 - 2		5/2/2024	16.0	3,941.77	367.90	0.00	0.00	4,309.67
<b>Totals</b>				\$4,749.95	\$389.45	\$0.00	\$0.00	\$5,139.40

If you have any questions about the items on this statement, please contact our offices.

# Santa Cruz Valley United Methodist Church

**OFFICE**

50 E Duval Road  
Green Valley, AZ 8561

September 26, 2024

**PHONE**

(520) 282-4085

**WEBSITE**

www.scvumc.org

Board of Supervisors

Pima County

**MISSION**

A multi-generational church,  
connecting, sharing and  
growing in the love of Christ.

Petition for Relief of Taxes

Re: 50 E Duval Road, Green Valley, AZ 85614

Parcel: Book 304 Map 15 Parcel 020D

**VISION**

An accepting church, inspired  
and empowered by God to  
serve the world.

We purchased this property in July of 2023. Unfortunately filing the tax exemption form is something that fell through the crack. We have paid \$3711.73 in taxes and to the best of my knowledge all the correct paperwork for our future religious exemption has been filed. Any relief we can get from taxes will be appreciated. If additional information is needed please contact me immediately.

**VALUES**

Christ-Centered, Loving,  
Accepting, Learning,  
Outreaching, Growing, Humility

Sincerely,

Sally F. Rankin

Finance Chairman, Santa Cruz Valley United Methodist Church

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# Santa Cruz Valley United Methodist Church

August 11, 2024

To Whom It May Concern:

This letter is to request tax-exempt status for Santa Cruz Valley United Methodist Church, located at 50 E. Duval Road in Green Valley, Arizona.

As a United Methodist Church, our mission is to make disciples of Jesus Christ. We do this by holding regular Sunday morning worship services on our property for all of our members, attendees, and any guests. Our building and property are also available for use during funerals and weddings. We nurture people in Christian living through religious education classes, Sunday School, worship, baptism, communion, Bible and book studies, fellowship, and prayer. We engage in events and activities in our community as a church congregation, in order to proclaim the gospel, seek, welcome, and gather others who are interested in living by Jesus' teachings and sharing God's love and grace with all people.

Our building is used to help support our minister and our congregation as we strive to live in the world in ways that help heal the sick, feed the hungry, care for the stranger, and free the oppressed. Our minister maintains an office on our church property to engage in the work of administration, worship planning, and pastoral care. Church committee meetings to conduct business of our ministries and events are held regularly on our property.

Several ministries exist because of the work done by and through our church, and those ministries are organized and administered through meetings and trainings held on our property. We collect school supplies and Christmas gifts for an elementary school near the border, we collect food donations to give to the Sahuarita food bank. One of the buildings on our property is used for Adventures with Friends, a day care for adults with developmental and intellectual disabilities.

Sierra Tree Service has been renting some space on the property to park their vehicles. They remain as tenants.

Several years ago, the church began a ministry for adults with developmental and intellectual disabilities, Friend for Life. Several of our members plus one mother organized and implemented this program. We were approached by Assure Health about taking over this program and expanding it to five days a week. They rent space on our campus and the program is now called Adventure with Friends. Our pastor provides a weekly bible study for the group and the adults frequently attend our worship services and fellowship events with us.

Sincerely,



Reverend Meredith Joubert, M.Div., M.S

## OFFICE

50 E Duval Road  
Green Valley, AZ 8561

## PHONE

(520) 282-4085

## WEBSITE

[www.scvumc.org](http://www.scvumc.org)

## MISSION

A multi-generational church,  
connecting, sharing and growing  
in the love of Christ.

## VISION

An accepting church, inspired  
and empowered by God to serve  
the world.

## VALUES

Christ-Centered, Loving,  
Accepting, Learning,  
Outreaching, Growing, Humility

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# Santa Cruz Valley United Methodist Church

**OFFICE**

50 E Duval Road  
Green Valley, AZ 8561

August 16, 2024

**PHONE**

(520) 282-4085

**WEBSITE**

www.scvumc.org

**MISSION**

A multi-generational church,  
connecting, sharing and  
growing in the love of Christ.

**VISION**

An accepting church, inspired  
and empowered by God to  
serve the world.

**VALUES**

Christ-Centered, Loving,  
Accepting, Learning,  
Outreaching, Growing, Humility

To Whom It May Concern:

We acquired the property at 50 E Duval Road, Green Valley, AZ on July 10, 2023. The closing statement is attached. We are prepared to pay the prorated taxes from the previous owner in the amount of \$3932.07 and are requesting the waiver for the remaining taxes in 2023 and any future taxes.

Thank you for your consideration in this matter.

Respectfully,

Sally F. Rankin  
Finance Chairman  
713-806-7364

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NON-PROFIT AND RELIGIOUS ORGANIZATIONS  
Property Tax Information and Questionnaire form

**QUESTIONNAIRE FOR PROPERTY TAX EXEMPTION**  
**ALL QUESTIONS MUST BE ANSWERED TO BE CONSIDERED FOR EXEMPTION**

1. Name & Address of Organization:  
SANTA CRUZ VALLEY UNITED METHODIST CHURCH  
50 E. DUVAL ROAD  
GREEN VALLEY, AZ 85614
2. Under which section of Title 42, Chapter 11, Article 3 does your organization claim exemption? 42-11109  
(Arizona Revised Statutes can be found at: [www.azleg.gov](http://www.azleg.gov))
3. Are there any type of business activities such as snack bars, cafés or restaurants operating on the premises? Yes  No
4. Is the organization exempt from Federal and/or State income taxes?  
Yes  No
5. Is the Organization a 501 (C)? Yes  which type 3. No
6. Claimant is: Owner/Operator  Owner only  Operator only
7. Exemption is claimed on:  
All land  Buildings & Improvements  Personal Property
8. Is any portion of the property used as a place of residence? Yes  No   
If yes, state number of individuals occupying the premises and the duration of the occupancy. \_\_\_\_\_
9. Does applicant receive any income? (other than free will offerings in connection with this property) Yes  No
10. Is any portion of the property being leased or rented to a non-profit and/or a for-profit organization(s)? Yes  No . If yes, please list the name(s) of the organization(s) SIERRA TREE SERVICE  
ASSURE HEALTH-ADVENTURE WITH FRIENDS
11. List date of occupancy: Month 9 Day 1 Year 2023

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Suzanne Droubie  
Pima County Assessor

240 N. Stone Ave Tucson,  
AZ 85701 Phone:  
(520)724-7500  
ASRValRelief@pima.gov

**REQUEST FOR REDEMPTION OF WAIVER**

Name: SANTA CRUZ VALLEY UNITED METHODIST CHURCH

Address: 50 E. DUVAL ROAD GREEN VALLEY, AZ 85614

Mailing (If different from above): \_\_\_\_\_

Phone: (520) 282-4085

Parcel/Account Number: 304-15-0208

Exemption Type: \_\_\_\_\_ Personal (100% Disabled/Widow/Widower)

Non-Profit Organization

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The application for tax exemption was filed after the March 1 deadline.  
I hereby request that the waiver of tax exemption be redeemed by the Pima County Board of Supervisors per A.R.S. §42-11153. NOTE: If taxes have become due, this application will not be processed and is hereby denied in conformance with Statute A.R.S. §42-11153(B)

Signed, Nardew U Taber Date: 8/16/24

**Please return this form to:**

Pima County Assessor's Office  
Valuation Relief Programs  
240 N. Stone Ave.  
Tucson, AZ 85701



**FINANCE & ADMINISTRATION**  
General Council on Finance and Administration  
THE UNITED METHODIST CHURCH

PO Box 340029  
Nashville, TN 37203-0029

May 17, 2023

RECEIVED AUG 21 2024

Santa Cruz Valley United Methodist Church  
71 E Sahuarita Rd  
Sahuarita AZ 85629

**Re: Certification of Inclusion in The United Methodist Church Group Tax Exemption Ruling**  
**Affiliated Organization: Santa Cruz Valley United Methodist Church**  
**Affiliated Organization's Employer Identification Number (EIN): 86-1018317**

This letter will certify that the affiliated organization named above is included in The United Methodist Church Group Tax Exemption Ruling ("UMC Group Ruling"). In particular, as stated in the Group Ruling determination letter issued to The United Methodist Church by the Internal Revenue Service ("IRS"), this affiliated organization is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code.

This certification letter is issued by the General Council on Finance and Administration of The United Methodist Church ("GCFA"), the central organization for the UMC Group Ruling. As the central organization, GCFA has been granted the authority by the IRS to determine which organizations are included in the UMC Group Ruling. (The IRS Group Exemption Number ("GEN") for the UMC Group Ruling is 2573.) Thus, this certification letter, together with the enclosed copy of the IRS Group Ruling determination letter, serves to verify the tax-exempt status of this affiliated organization.

If you have any further questions, please feel free to contact the GCFA Legal Services Department at (866) 367-4232 or [legal@gcfa.org](mailto:legal@gcfa.org).

Sincerely,

General Council on Finance and Administration of  
The United Methodist Church

Leticia Mayberry Wright  
Deputy General Counsel

Enclosures

SEP 17 24 PM 02:20 FC CLK OF BD

Department of the Treasury



**Internal Revenue Service**  
**Washington, DC 20224**

Date: OCT 16 1974 In reply refer to: T:MS:EO:R:1-2

Council on Finance and Administration  
of the United Methodist  
Church, a/k/a the United  
Methodist Church and Its  
Affiliated Organizations  
1200 Davis Street  
Evanston, Illinois 60201

Attention: R. Bryan Brawner

Dear Applicant:

This refers to the information submitted for use in determining your status and the status of your affiliated religious organizations, on the list you submitted, as being exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

For the purposes of this group ruling, your affiliated religious organizations include The General Conference, Judicial Council; General Agencies, Commissions, Committees, their divisions and departments thereof, and, other related organizations; Jurisdictional Conferences and Affiliated Agencies, Commissions, and other organizations; Annual Conferences and divisions and departments thereof; Annual Conference Agencies, Commissions, Committees, and affiliated organization; Local Churches and Local Church Agencies, Commissions, Committees, and other affiliated organizations.

Based on the information supplied, we rule that you and your affiliated religious organizations, on the list you submitted, are exempt from Federal income tax under section 501(c)(3) of the Code.

We have further determined that you and the affiliated religious organizations you operate, supervise, or control, and which are covered by your notification to us, are not private foundations within the meaning of section 509(a) of the Code, because you and your affiliated religious organizations are organizations described in sections 170(b)(1)(A)(i) and 509(a)(1) of the Code.

**Council on Finance and Administration of the  
United Methodist Church, a/k/a the United  
Methodist Church and Its Affiliated Organiza-  
tions**

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, they are not automatically exempt from other Federal excise taxes.

You and your affiliated religious organizations are not required to file the Return for Organizations Exempt From Income Tax, Form 990, as you come within the exception contained in section 6033(a)(2)(A)(i) of the Code.

You and your affiliated religious organizations are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you or your affiliated religious organizations are subject to this tax, you must file an income tax return on Form 990-T. In this letter we are not determining whether any of your present or proposed activities, or those of your affiliated religious organizations, is unrelated trade or business as defined in section 513 of the Code.

You and your affiliated religious organizations are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. You and your affiliated religious organizations are not liable for the taxes imposed under the Federal Unemployment Tax Act (FUTA).

Donors may deduct contributions to you and to your affiliated religious organizations as provided by section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to or for your use, or to or for the use of your affiliated religious organizations, are deductible for Federal estate and gift tax purposes under section 2055, 2106, and 2522 of the Code.

If you change your purposes, character, or method of operation, please let your key District Director know so he may consider the effect on your exempt status. Also, please keep him informed of any changes in your name or address.

**Council on Finance and Administration of the  
United Methodist Church, a/k/a the United  
Methodist Church and Its Affiliated Organiza-  
tions**

You should advise each of your affiliated religious organizations of the provisions of this ruling, including the requirements for filing Federal tax returns.

Each year, within 45 days after the close of your annual accounting period, please send the following to the Director, Internal Revenue Service Center, 11601 Roosevelt Boulevard, Philadelphia, Pennsylvania 19155, Attention: EOR Branch:

1. A statement describing any changes during the year in the purposes, character, or method of operation of your affiliated religious organizations.
2. Lists of the names, mailing addresses, including Postal Zip Codes and employer identification numbers, of your affiliated religious organizations that during the year:
  - a. changed names or addresses;
  - b. were deleted from your roster; or
  - c. were added to the roster.
3. For affiliated religious organizations to be added attach:
  - a. a statement that the information upon which your present group exemption letter is based applies;
  - b. a statement that each has given you written authorization to add its name to the roster;
  - c. a list of those to which the Service previously issued exemption rulings or determination letters; and
  - d. a statement that none of the affiliated religious organization are private foundations as defined in section 509(a) of the Code.

12/21/00 pm  
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AZ CORP COMMISSION  
FILED

- 0972299-9

ARTICLES OF INCORPORATION

DEC 14 4 04 PM '00

OF

*Xupita Ortiz*  
2012/10/05

SANTA CRUZ VALLEY UNITED METHODIST

The undersigned, for the purpose of forming a non-profit corporation under and by virtue of the laws of the State of Arizona, does hereby adopt the following Articles of Incorporation:

I.

Name

The name of the corporation is Santa Cruz Valley United Methodist ("Corporation").  
M.D.A.

II.

Incorporator

The name and address of the incorporator is as follows:

Name

Address

L. Douglas Dunipace

2 North Central Avenue, Suite 1600  
Phoenix, AZ 85004-2393

III.

Purpose and Character of Initial Affairs

This Corporation is organized exclusively for charitable, educational, and scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provisions of any future United States Internal Revenue law) and its regulations (as they now exist or may hereafter be amended).

The character of the affairs which the Corporation initially intends actually to conduct is the establishment of a United Methodist fellowship consistent with the purposes set forth from time to time in the Discipline of The United Methodist Church (the "Discipline").

IV.

Board of Directors

The initial Board of Directors, who shall be known as trustees, shall consist of three (3) trustees. The following persons shall serve as the initial trustees of the Corporation and shall serve as provided in the Discipline:

2

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(Handwritten mark)

Name	Address
Harold Wilhoby	1493 West Hidden Creek Court Green Valley, AZ 85614
Albert Adams	783 West Calle de Alegria Green Valley, AZ 85614
Katho Simmonds	16996 South La Canada Drive Sahuarita, AZ 85629

V.

Limitation on Director Liability

To the fullest extent that the law of the State of Arizona, as it now exists or as it may hereafter be amended, permits the elimination of or limitation on the liability of directors, no director of the Corporation shall be liable for monetary damages for any action taken or for any failure to take any action. Any repeal or modification of this Article shall be prospective only and shall not adversely affect any limitation on the personal liability of a director of the Corporation existing at the time of such repeal or modification. For purposes of this Article V, "director" includes a person who serves on a board or council of the Corporation in an advisory capacity.

VI.

Predecessor Organization

Upon the filing of these Articles of Incorporation, the unincorporated society or association now known as Santa Cruz Valley United Methodist Fellowship, and the members of such society or association shall be members of the Corporation, and all rights, privileges, immunities, powers, franchises, authority, property and obligations of such unincorporated society or association shall thereupon pass to, vest in, and be the rights, privileges, immunities, powers, franchises, authority, property, and obligations of the Corporation.

VII.

United Methodist Doctrine

The corporation shall support the Doctrine of the United Methodist Church and it and all its property, both real and personal, shall be subject to the Discipline, Law, Usages and Ministerial appointments of The United Methodist Church as are now and shall be, from time to time, established, made, and declared by the lawful authority of said church. The business of the Corporation shall be conducted in conformity with the Discipline as the same now exists or as may hereafter be amended, changed, or modified, and the bylaws of the Corporation shall include the

incubated by legal@johnc.com 1/23/12 11



*Discipline* and no bylaws shall be adopted inconsistent with the provisions of said *Discipline*.

#### VIII.

##### Members.

The members of the Corporation shall be composed of such persons (ministerial and lay) as from time to time shall be defined in accordance with the *Discipline* and shall have such voting rights and other rights as are prescribed from time to time in the *Discipline*.

#### IX.

##### Exempt Organization

This Corporation is organized not for pecuniary profit and it shall not have the power or authority to issue shares of stock or declare or pay dividends. No part of the net earnings or assets of the Corporation shall inure to the benefit of, or be distributable to, its directors, officers or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in these Articles of Incorporation.

No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.

Notwithstanding any other provision of these Articles, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on (a) by an organization exempt under Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue law) and its regulations (as they now exist or may hereafter be amended) or (b) an organization, contributions to which are deductible under Section 170(e)(2) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue law) and its regulations (as they now exist or may hereafter be amended).

#### X.

##### Distribution of Assets

In the event of dissolution or final liquidation of the Corporation, none of the property of the Corporation nor any proceeds thereof shall be distributed or divided among any of the trustees or members of the Corporation or inure to the benefit of any individual.

After all liabilities and obligations of the Corporation have been paid, satisfied or discharged, or adequate provision made therefore, all remaining property and assets of the

Corporation shall be distributed to and shall become vested in the Desert Southwest Annual Conference of The United Methodist Church as provided in the Discipline, or to one or more organizations that are organized and operated exclusively for religious, educational or charitable purposes and that have established their tax exempt status under Section 501(c)(3) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States Internal Revenue law) and its regulations (as they now exist or may hereafter be amended).

XI.

**Statutory Agent**

The name and address of the initial statutory agent of the Corporation is I. Douglas Drapeau, 2 North Central, Suite 1600, Phoenix, AZ 85004-2993.

XII.

**Known Place of Business**

The known place of business of the Corporation shall be 300 West Hermann Boulevard, Chocoma Valley, AZ 85614, subject to change as provided by law.

IN WITNESS WHEREOF, I hereunto affix my signature this 17<sup>th</sup> day of December, 2000.

  
\_\_\_\_\_  
I. Douglas Drapeau, Incapacitated

**Acceptance of Appointment by Statutory Agent**

**I, I. Douglas Douglas, having been designated to act as Statutory Agent for Santa Cruz Valley United Methodist, hereby consent to act in that capacity until removed or resignation is submitted in accordance with the Arizona Revised Statutes.**

  
I. Douglas Douglas

Dated 12-16-00

CURRENT AGENT (APPOINTED 2/3/04 - UMB)

ARLINE CAMP, SECRETARY  
4773 VIA DE FERERO  
GREEN VALLEY, AZ 85614

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PRINTED IN THE UNITED STATES OF AMERICA

RE: BY-LAWS  
WE HAVE NO BY-LAWS. WE ARE  
GOVERNED BY THE BOOK OF  
DISCIPLINE.

## EPISCOPAL GREETINGS

To all people and pastors of United Methodism:

"Grace to you and peace from God our Father and the Lord Jesus Christ."  
—1 Corinthians 1:3

The *Discipline* is the book of law of The United Methodist Church. It is the product of 200 years of the General Conferences of the denominations that now form The United Methodist Church.

The *Discipline* as the instrument for setting forth the laws, plan, polity, and process by which United Methodists govern themselves remains constant. Each General Conference amends, perfects, clarifies, and adds its own contribution to the *Discipline*. We do not see the *Discipline* as sacrosanct or infallible, but we do consider it a document suitable to our heritage. It is the most current statement of how United Methodists agree to live their lives together. It reflects our understanding of the Church and of what is expected of its laity and clergy as they seek to be effective witnesses in the world as a part of the whole body of Christ.

This book of covenant sets forth the theological grounding of The United Methodist Church in biblical faith and affirms that we go forward as "loyal heirs to all that [is] best in the Christian past." It makes clear that The United Methodist Church is an inclusive society without regard to ethnic origin, economic condition, gender, age, or the disabilities of its constituents. It asserts that all who are baptized and confirmed are ministers of Jesus Christ. It affirms the conciliar principle and connectionalism as distinctive marks of United Methodist ecclesiology, makes clear the global character of the Church's mission, and declares interdependence with other Christian bodies both in spirit and coop-

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membership roll of the local church; and the membership shall thereby be terminated.<sup>5</sup> For the transfer of a member of The United Methodist Church to a church of another denomination, an official "Transfer of Membership to Another Denomination" form shall be used.

¶ 242. If a pastor is informed that a member has without notice united with a church of another denomination, the pastor shall make diligent inquiry and, if the report is confirmed, shall enter "Withdrawn" after the person's name on the membership roll and shall report the same to the next charge conference.

¶ 243. Persons may be removed from the roll of baptized members by death, transfer, withdrawal or removal for cause, with the understanding that withdrawal or removal for cause in no way abrogates the baptismal covenant from God's side. When a person returns to the church, he or she affirms the baptismal vows and, without rebaptism, becomes a professing member.

If a member proposes to withdraw from The United Methodist Church, that member shall communicate the purpose in writing to the pastor of the local church in which membership is held. On receiving such notice of withdrawal, the pastor shall properly record the fact of withdrawal on the membership roll. If requested, the pastor shall give a statement of withdrawal to such member. Such person, upon written request, may be restored to membership on recommendation of the pastor.

¶ 244. Persons may be removed from the roll of professing members by death, transfer, withdrawal, charge conference action or removal for cause (See ¶¶ 229, 231, 236-243, 2627.4.)

## Section VI. Organization and Administration

¶ 245. The local church shall be organized so that it can pursue its primary task and mission in the context of its own community—reaching out and receiving with joy all who will respond; encouraging people in their relationship with God and inviting them to commitment to God's love in Jesus Christ; providing opportunities for them to seek strengthening and growth in spiritual formation; and supporting them to live lovingly and justly in the power of the Holy Spirit as faithful disciples.

<sup>5</sup> See Judicial Council Decision 696.

In carrying out its primary task, it shall be organized so that adequate provision is made for these basic responsibilities: (1) planning and implementing a program of nurture, outreach, and witness for persons and families within and without the congregation; (2) providing for effective pastoral and lay leadership; (3) providing for financial support, physical facilities, and the legal obligations of the church; (4) utilizing the appropriate relationships and resources of the district and annual conference; (5) providing for the proper creation, maintenance, and disposition of documentary record material of the local church; and (6) seeking inclusiveness in all aspects of its life without regard to race, gender, age, national origin, or disabilities.

¶ 246. The basic organizational plan for the local church shall include provision for the following units: a charge conference, a church council, a committee on pastor-parish relations, a board of trustees, a committee on finance, a committee on nominations and personnel, and such other elected leaders, commissions, councils, committees, and task forces as the charge conference may determine. Every local church shall develop a plan for organizing its administrative and programmatic responsibilities. Each local congregation shall provide a comprehensive program of nurture, outreach, and witness, along with leadership training and the planning and administration of the congregation's organizational and temporal life, in accordance with the mission of The United Methodist Church (See ¶¶ 101-120).

1. The church council and all other administrative and programmatic structures of the local church shall be amenable to the charge conference (see ¶ 248). The church council shall function as the executive agency of the charge conference.

2. Alternative plans may be developed in accordance with the provision of ¶ 249.2. Such alternatives include: nurture, outreach, and witness ministries; administrative council; or administrative board/committees ministries.

3. Members of the church council or alternative structure shall be persons of genuine Christian character who love the church, are morally upright, are committed to the mandate of inclusiveness in the life of the church, are loyal to the ethical standards of The United Methodist Church and both in the Social Principles, and are competent to administer its affairs. It shall include youth members chosen according to the standards as adults. All shall be members of the local church, unless where central conference legislation provides otherwise. The pastor shall be the administrative officer and, as such, shall be an ex

g) participating in leadership training programs as offered by the annual conference and/or district.

The church council chairperson shall be entitled to attend meetings of all boards and committees of the church unless specifically limited by the *Book of Discipline*. The chairperson is encouraged to attend annual conference.

## THE CHURCH COUNCIL

¶ 254. 1. The **church council** shall provide for the planning and implementing of a program of nurture, outreach, witness, and resources in the local church and for the administration of its organizational and temporal life. The church council shall be amenable to and function as the executive agency of the charge conference (¶ 249). Its membership shall include the chairperson of the church council; the pastor(s); the lay leader; the lay member(s) of the annual conference; the chairperson of the committee on finance; the chairperson (or representative, if the chairperson is from another church on a multichurch charge) of the committee on pastor-parish relations; the chairperson of the board of trustees; representatives of the nurturing, outreach, and witness ministries of the church; and such other persons as the charge conference may determine. The employed professional staff who are members of the church council shall not vote on matters pertaining to their employee relationship.

2. a) The nurturing ministries of the church shall give attention to the educational, worship, and stewardship components of ministry.

b) The outreach ministries of the church shall give attention to local and larger community ministries of compassion and advocacy, church and societal issues, global ministries concerns, health and welfare ministries, Christian unity and interreligious concerns, religion and race, and status and role of women.

c) The witness ministries of the church shall give attention to evangelistic outreach to persons, membership care, spiritual formation, communications, lay speaking ministries, and witnessing through the sharing of personal and congregational stories of Christian experience, faith, and service.

3. *Meetings*—a) The council shall meet at least quarterly. Special meetings may be called by the chairperson or pastor.

b) In order that the council may give adequate consideration to the missional purpose of the local church, it is recommended that the first

item at each of its meetings shall be related to its ministries of nurture, outreach, and witness. The administrative and supportive responsibilities of the church will then be given attention. It is also recommended that the council use a consensus/discernment decision-making style.

c) The council shall annually plan for the congregation's future mission and ministry.

4. If a church chooses to have a church council, it shall provide for the planning and implementing of the mission and ministry of the local church and for the administration and organization of its temporal life. The council shall initiate planning, establish objectives, adopt goals, authorize action, determine policy, receive reports, evaluate the church's ministries, and review the mission and ministry of the church.

a) The church council shall be amenable to and function as the administrative agency of the charge conference.

b) The church council shall:

(1) review the membership of the local church;

(2) fill vacancies occurring among the lay officers of the church;

(3) establish the budget on recommendation of the committee on finance and ensure adequate provision for the financial needs of the church;

(4) recommend to the charge conference the salary and other remuneration of the pastor(s) and staff persons after receiving recommendations from the committee on pastor-parish relations.

c) *Membership*—The charge conference will determine the size of the church council. The membership of the council may consist of as few as eight persons or as large as the charge conference deems appropriate. The council shall include persons who represent the program ministries of the church as outlined in ¶ 245. The membership shall include but not be limited to the following:

(1) the chairperson of the church council;

(2) the lay leader;

(3) the chairperson of the pastor-parish relations committee;

(4) the chairperson of the committee on finance;

(5) the chairperson of the board of trustees;

(6) the church treasurer;

(7) a lay member to annual conference;

(8) the pastor(s).

d) *Quorum*—The members present and voting at any duly announced meeting shall constitute a quorum.

**Santa Cruz Valley United Methodist Church**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
 January - June, 2024

	Jan 2024		Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Total	
	Actual	Budget	Actual	Actual	Actual	Actual	Actual	Actual	Budget
<b>Revenue</b>									
40100 Pledged	4,258.80	4,776.00	4,414.80	4,565.40	4,097.45	3,938.10	4,088.33	25,362.88	28,656.00
40105 Unpledged	652.00	1,250.00	1,577.00	2,254.25	982.00	2,067.00	1,387.00	8,919.25	7,500.00
40110 Plate Offering	222.00	300.00	140.00	291.00	94.00	146.00	314.00	1,207.00	1,800.00
40405 Facilities Rental	3,750.00	3,650.00	3,746.40	3,800.00	3,750.00	3,650.00	5,050.00	23,746.40	21,900.00
41050 Interest Earned	2,919.59	100.00	427.25	593.17	2,425.86	729.41	493.18	7,588.46	600.00
41090 General Income	177.95	200.00						177.95	1,200.00
41095 Garage Sale			130.00					130.00	0.00
41601 Birthday Offering		60.00	147.00	223.00				370.00	360.00
Sales							5,901.00	5,901.00	0.00
<b>Total Revenue</b>	<b>\$ 11,980.34</b>	<b>\$ 10,336.00</b>	<b>\$ 10,582.45</b>	<b>\$ 11,726.82</b>	<b>\$ 11,349.31</b>	<b>\$ 10,530.51</b>	<b>\$ 17,233.51</b>	<b>\$ 73,402.94</b>	<b>\$ 62,016.00</b>
<b>Gross Profit</b>	<b>\$ 11,980.34</b>	<b>\$ 10,336.00</b>	<b>\$ 10,582.45</b>	<b>\$ 11,726.82</b>	<b>\$ 11,349.31</b>	<b>\$ 10,530.51</b>	<b>\$ 17,233.51</b>	<b>\$ 73,402.94</b>	<b>\$ 62,016.00</b>
<b>Expenditures</b>									
61000 Conference Apportionments		820.33	1,640.66	820.33		820.33	820.33	4,101.65	4,921.08
71100 Children's Education Supplies		20.00				32.31		32.31	120.00
71200 Child care	90.00		90.00	60.00	90.00	90.00	90.00	510.00	0.00
81130 Name Tags - Membership Fund		6.00			103.34			103.34	36.00
82100 Social - Hospitality - Kitchen Supplies		15.00						0.00	90.00
82300 Worship Committee - Pulpit Supplies		83.00		59.19	302.75		800.00	1,161.94	498.00
82400 Publicity Committee	569.00	50.00	400.00	266.29	270.00	42.98	195.00	1,743.27	300.00
85100 Music, Audio, Visual & Repair				53.91				53.91	0.00
85200 Music and Video Licenses		100.00	290.00					290.00	600.00
85201 Music Leader	475.00	250.00	140.00	430.00	515.00	360.00	580.00	2,500.00	1,500.00
91300 Office expenses	317.18	25.00	310.64	72.00	72.00			771.82	150.00
Bank fees & service charges	375.21	15.00	355.64	370.87	319.24	340.06	329.88	2,090.90	90.00

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TOTAL

	J		F	M	A	M	J	ACT	BUDGET
Software & apps	71.02	130.00	75.00			103.48	72.00	321.50	780.00
<b>Total 91300 Office expenses</b>	<b>\$ 763.41</b>	<b>\$ 170.00</b>	<b>\$ 741.28</b>	<b>\$ 442.87</b>	<b>\$ 391.24</b>	<b>\$ 443.54</b>	<b>\$ 401.88</b>	<b>\$ 3,184.22</b>	<b>\$ 1,020.00</b>
91320 Church Phones- Internet	133.68	220.00	176.99	176.99	176.84	176.84	176.84	1,018.18	1,320.00
91325 Copier Expense		42.00	60.48	101.50				161.98	252.00
91410 Bank - EFT Fees		6.00			1,364.22	3.20	3.20	1,370.62	36.00
91420 Website Expenses	75.24	11.00	11.16	3.24	3.24		3.24	96.12	66.00
91430 Computer Software & Training		46.00		96.00				96.00	276.00
92016 Maintenance and Supplies	4.75	75.00		450.00	57.00	4.75		516.50	450.00
92017 HVAC Service Contract/Repair	57.93	58.00	57.93	57.93	57.93	57.93	57.93	347.58	348.00
92018 Cleaning	260.00	282.00	260.00	260.00	390.00	260.00	460.00	1,890.00	1,692.00
92019 Weed/Pest Control	26.00	88.00	88.00	538.00	88.00	88.00	88.00	916.00	528.00
92155 Electric	133.95	350.00	222.21	190.61	173.97	64.52	137.90	923.16	2,100.00
92160 Water - Water	98.59	100.00	110.48	73.62	68.27	71.24	74.21	496.41	600.00
92161 Water - Wastewater (sewer)		30.00			12.69	55.04		67.73	180.00
92165 Gas	141.61	150.00	153.89	91.97	67.03	28.66	19.09	502.25	900.00
92170 Trash Service	131.35	140.00	129.21	130.63	130.63	130.28	162.80	814.90	840.00
92505 Commercial Multi Peril & Liability		450.00	456.04		912.08	456.04	703.54	2,527.70	2,700.00
92510 Excess Liability - Shared		29.00						0.00	174.00
92515 Workers' compensation insurance	113.11	30.00						113.11	180.00
93130 Bookkeeper - Secretary Wages	500.00	250.00		500.00		250.00	250.00	1,500.00	1,500.00
94510 Sr. Pastor Salary	3,681.52	4,114.58	3,681.52	3,681.52	3,681.52	3,681.52	3,681.52	22,089.12	24,687.48
94520 Sr. Pastor Housing	1,900.00	1,900.00	1,900.00	1,900.00	1,900.00	1,900.00	1,900.00	11,400.00	11,400.00
94610 Sr. Pastor Pension Plan	820.92	821.00	820.92	820.92	820.92	820.92	820.92	4,925.52	4,926.00
94620 Wespah PIP	189.45					757.80	189.45	1,136.70	0.00
94630 Sr. Pastor Health Insurance	1,588.80	1,390.00	1,405.00	1,405.00	1,405.00	1,405.00	1,405.00	8,613.80	8,340.00
94710 Sr. Pastor Paid Health Insurance	467.16	275.00	467.16	467.16	467.16	467.16	467.16	2,802.96	1,650.00
94800 Sr. Pastor Accountable Reimbursable Exp.	85.00	250.00	55.56	39.42	138.51	75.28		393.77	1,500.00
94810 Sr. Pastor Continuing Education		83.00		100.00				100.00	498.00
94812 Annual Conference Expenses		83.00	199.00				780.80	979.80	498.00
Ask the accountant	-94.58							-94.58	0.00
<b>Total Expenditures</b>	<b>\$ 12,211.89</b>	<b>\$ 12,787.91</b>	<b>\$ 13,557.49</b>	<b>\$ 13,217.10</b>	<b>\$ 13,587.34</b>	<b>\$ 12,543.34</b>	<b>\$ 14,268.81</b>	<b>\$ 79,385.97</b>	<b>\$ 76,727.46</b>
<b>Net Operating Revenue</b>	<b>-\$ 231.55</b>	<b>-\$ 2,451.91</b>	<b>-\$ 2,975.04</b>	<b>-\$ 1,490.28</b>	<b>-\$ 2,238.03</b>	<b>-\$ 2,012.83</b>	<b>\$ 2,964.70</b>	<b>-\$ 5,983.03</b>	<b>-\$ 14,711.46</b>

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# Santa Cruz Valley United Methodist Church

## Budget vs. Actuals: 2023 - FY23 P&L

January - December 2023

	Dec 2023		Total	
	Actual	Actual	Budget	
	<b>Revenue</b>			
22390 Pumpkin Patch (deleted)		0.00		3,804.00
22391 Trunk Sale (deleted)		78.27		480.00
22392 Everything Kidz (Resale Shop) (deleted)		1,083.24		4,500.00
22393 Building/Land Project		20,086.50		0.00
40100 Pledged	4,571.51	66,984.36		69,168.00
40105 Unpledged	3,050.00	22,081.38		15,000.00
40110 Plate Offering	182.00	2,835.52		3,600.00
40360 Additional Gifts		500.00		0.00
40405 Facilities Rental	3,650.00	34,525.00		32,400.00
40406 Temp Holding		0.00		0.00
40410 Conference Loan/Matching Funds (deleted)		26,542.00		0.00
41050 Interest Earned	396.17	1,937.68		9.60
41090 General Income	32.74	38,545.97		150.00
41601 Birthday Offering	83.00	292.50		600.00
Contributed income		0.00		0.00
Donations directed by individuals		490.70		0.00
<b>Total Contributed income</b>	<b>\$ 0.00</b>	<b>\$ 490.70</b>	<b>\$ 0.00</b>	
Sales		462.25		0.00
Uncategorized Income		6,292.64		0.00
<b>Total Revenue</b>	<b>\$ 11,965.42</b>	<b>\$ 222,738.01</b>	<b>\$ 129,711.60</b>	
<b>Gross Profit</b>	<b>\$ 11,965.42</b>	<b>\$ 222,738.01</b>	<b>\$ 129,711.60</b>	
<b>Expenditures</b>				
20680 Pastoral Health Insurance (deleted)	2,257.48	15,802.36		0.00
20690 Personal Investment Plan Pastor (deleted)		2,195.64		0.00
61000 Conference Apportionments	1,039.16	12,469.92		12,469.92
71100 Children's Education Supplies		69.66		204.00
71200 Child care	90.00	90.00		0.00
71500 Christian Education - Other	32.00	-103.99		96.00
72000 50 East Duval Road	-6,798.07	-430,479.04		0.00
81130 Name Tags - Membership Fund		73.75		49.92
82100 Social - Hospitality - Kitchen Supplies	380.19	764.28		0.00
82300 Worship Committee - Pulpit Supplies	1,285.64	1,674.68		0.00
82400 Publicity Committee	135.00	1,936.23		0.00
85100 Music, Audio, Visual & Repair	163.03	163.03		0.00
85200 Music and Video Licenses	595.00	1,281.00		0.00
85201 Music Leader		290.00		0.00

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<b>99100 Building Mortgage - Interest (deleted)</b>		<b>26,046.56</b>	<b>43,215.84</b>
<b>91300 Office expenses</b>	<b>31.11</b>	<b>393.54</b>	<b>396.00</b>
Bank fees & service charges	335.36	2,092.22	0.00
Software & apps	130.38	1,061.53	0.00
<b>Total 91300 Office expenses</b>	<b>\$ 496.85</b>	<b>\$ 3,547.29</b>	<b>\$ 396.00</b>
<b>91310 Postage Expense</b>		<b>0.00</b>	<b>96.00</b>
<b>91315 Postal Box Rental (deleted)</b>		<b>202.00</b>	<b>198.00</b>
<b>91320 Church Phones- Internet</b>		<b>3,179.55</b>	<b>3,204.00</b>
<b>91325 Copier Expense</b>	<b>101.50</b>	<b>527.25</b>	<b>150.00</b>
<b>91410 Bank - EFT Fees</b>	<b>14.80</b>	<b>36.00</b>	<b>996.00</b>
<b>91420 Website Expenses</b>		<b>335.32</b>	<b>696.00</b>
<b>91430 Computer Software &amp; Training</b>		<b>543.81</b>	<b>648.00</b>
<b>92015 Maintenance of Capital Assets</b>		<b>19,699.00</b>	<b>0.00</b>
<b>92016 Maintenance and Supplies</b>	<b>39.99</b>	<b>1,653.19</b>	<b>1,200.00</b>
<b>92017 HVAC Service Contract/Repair</b>		<b>820.95</b>	<b>1,296.00</b>
<b>92018 Cleaning</b>	<b>260.00</b>	<b>5,025.00</b>	<b>7,020.00</b>
<b>92019 Weed/Pest Control</b>		<b>713.00</b>	<b>528.00</b>
<b>92085 Fire Protection Subscription (deleted)</b>		<b>706.63</b>	<b>2,496.00</b>
<b>92086 Sprinkler - Fire Water (deleted)</b>		<b>238.25</b>	<b>0.00</b>
<b>92087 Accura Systems (deleted)</b>		<b>199.80</b>	<b>600.00</b>
<b>92155 Electric</b>	<b>146.57</b>	<b>8,256.91</b>	<b>5,004.00</b>
<b>92160 Water - Water</b>	<b>78.96</b>	<b>1,733.58</b>	<b>3,000.00</b>
<b>92161 Water - Wastewater (sewer)</b>		<b>388.29</b>	<b>504.00</b>
<b>92165 Gas</b>	<b>55.32</b>	<b>1,886.30</b>	<b>1,008.00</b>
<b>92170 Trash Service</b>	<b>133.77</b>	<b>1,943.45</b>	<b>2,160.00</b>
<b>92505 Commercial Multi Peril &amp; Liability</b>	<b>602.00</b>	<b>6,633.41</b>	<b>6,276.00</b>
<b>92510 Excess Liability - Shared</b>	<b>355.00</b>	<b>355.00</b>	<b>348.00</b>
<b>92515 Workers' compensation insurance</b>	<b>265.50</b>	<b>1,066.09</b>	<b>360.00</b>
<b>93130 Bookkeeper - Secretary Wages</b>		<b>3,050.00</b>	<b>3,000.00</b>
<b>94510 Sr. Pastor Salary</b>	<b>5,469.02</b>	<b>42,503.71</b>	<b>60,864.00</b>
<b>94520 Sr. Pastor Housing</b>	<b>1,900.00</b>	<b>21,850.00</b>	<b>22,800.00</b>
<b>94610 Sr. Pastor Pension Plan</b>		<b>6,393.40</b>	<b>9,036.00</b>
<b>94630 Sr. Pastor Health Insurance</b>		<b>5,681.00</b>	<b>14,940.00</b>
<b>94710 Sr. Pastor Paid Health Insurance</b>		<b>665.00</b>	<b>2,064.00</b>
<b>94800 Sr. Pastor Accountable Reimbursable Exp.</b>	<b>92.21</b>	<b>2,512.12</b>	<b>2,000.04</b>
<b>94810 Sr. Pastor Continuing Education</b>		<b>1,087.99</b>	<b>500.04</b>
<b>94812 Annual Conference Expenses</b>		<b>747.53</b>	<b>800.04</b>
<b>Uncategorized Expense</b>		<b>1,478.31</b>	<b>0.00</b>
<b>Total Expenditures</b>	<b>\$ 9,190.92</b>	<b>\$ -222,066.79</b>	<b>\$ 210,223.80</b>
<b>Net Operating Revenue</b>	<b>\$ 2,774.50</b>	<b>\$ 444,804.80</b>	<b>\$ -80,512.20</b>
<b>Other Revenue</b>			
Change in market value	20,688.83	7,950.61	0.00
Dividend Revenue	1.10	558.70	0.00
Insurance Claim Payments		6,876.36	0.00

<b>Interest Earned</b>		<b>248.03</b>	<b>0.00</b>
<b>Realized Income</b>	<b>526.98</b>	<b>2,197.93</b>	<b>0.00</b>
<b>Total Other Revenue</b>	<b>\$ 21,216.91</b>	<b>\$ 17,831.63</b>	<b>\$ 0.00</b>
<b>Net Other Revenue</b>	<b>\$ 21,216.91</b>	<b>\$ 17,831.63</b>	<b>\$ 0.00</b>
<b>Net Revenue</b>	<b>\$ 23,991.41</b>	<b>\$ 462,636.43</b>	<b>\$ -80,512.20</b>
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Santa Cruz Valley United Methodist Church Profit Loss Statement  
Year End - 2022

SCVUMC Income & Expense Accounts 2022	YTD December	YTD Budget	Variance
<b>Income</b>			
<b>40000 Budgeted Income</b>			
40100 Pledged	\$75,980.16	\$75,000.00	\$980.16
40105 Unpledged	\$15,760.21	\$24,999.96	(\$9,239.75)
40110 Plate Offering	\$3,762.00	\$1,500.00	\$2,262.00
40360 Additional Gifts	\$75.00	\$0.00	\$75.00
40405 Facilities Rental	\$10,765.64	\$8,400.00	\$2,365.64
40410 New Faith Subsidy/ Conference loan	\$81,000.00	\$81,000.00	\$0.00
<b>40000 Total Budgeted Income</b>	<b>\$187,343.01</b>	<b>\$190,899.96</b>	<b>(\$3,556.95)</b>
<b>41000 Non Budgeted Income</b>			
41050 Interest Earned	\$5.71	\$30.00	(\$24.29)
41090 General Income	\$298.59	\$150.00	\$148.59
<b>41000 Total Non Budgeted Income</b>	<b>\$304.30</b>	<b>\$180.00</b>	<b>\$124.30</b>
<b>41600 Fund Raiser</b>			
41601 Birthday Offering	\$473.00	\$1,200.00	(\$727.00)
41603 Pumpkin Patch	\$7,016.48	\$6,999.96	\$16.52
41604 Trunk Sale	\$739.36	\$0.00	\$739.36
41605 Resale Shop	\$4,122.36	\$0.00	\$4,122.36
41606 Building/Land Project	\$2,925.00	\$0.00	\$2,925.00
41607 Equitable Compensation Grant (Conference)			
<b>41600 Total Fundraisers</b>	<b>\$25,276.20</b>	<b>\$8,199.96</b>	<b>\$17,076.24</b>
<b>Total Income</b>	<b>\$212,923.51</b>	<b>\$199,279.92</b>	<b>\$13,643.59</b>
<b>Expenses</b>			
<b>60000 Program</b>			
60001 Birthday Offering	\$0.00	\$0.00	\$0.00
60003 Pumpkin Patch	\$3,187.62	\$3,500.04	(\$312.42)
60004 Trunk Sale	\$371.40	\$0.00	\$371.40
60005 Resale Shop	\$2,114.02	\$0.00	\$2,114.02
60006 Building/Land Project	\$2,500.00	\$0.00	\$2,500.00
<b>60000 Total program</b>	<b>\$5,687.62</b>	<b>\$291.67</b>	<b>\$5,395.95</b>
<b>61000 Conference Apportionments</b>	<b>\$9,586.46</b>	<b>\$9,465.00</b>	<b>\$121.46</b>
<b>71000 Christian Education</b>			
71100 Children's Education Supplies	\$182.29	\$1,200.00	(\$1,017.71)
71400 Vacation Bible School	\$9.00	\$0.00	\$9.00
71500 Christian Education - Other	\$111.44	\$0.00	\$111.44
71600 Messy Church	\$588.54	\$0.00	\$588.54
<b>71000 Total Christian Education</b>	<b>\$891.27</b>	<b>\$1,200.00</b>	<b>(\$308.73)</b>
<b>81100 Membership Committee</b>			
81130 Name Tags	\$0.00	\$50.04	(\$50.04)
81195 Upper Room Purchases	\$0.00	\$0.00	\$0.00
<b>81100 Total Membership Committee</b>	<b>\$0.00</b>	<b>\$50.04</b>	<b>(\$50.04)</b>
<b>82000 Church Committees</b>			
82100 Social - Hospitality - Kitchen Supplies	\$0.00	\$0.00	\$0.00
82200 Stewardship Committee	\$0.00	\$0.00	\$0.00

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Santa Cruz Valley United Methodist Church Profit Loss Statement  
Year End - 2022

SCVUMC Income & Expense Accounts 2022		YTD December	YTD Budget	Variance
82300	Worship Committee - Pulpit Supplies	\$151.66	\$0.00	\$151.66
82400	Publicity Committee	\$607.08	\$699.96	(\$92.88)
82500	Membership Committee	\$0.00	\$50.04	(\$50.04)
<b>82000</b>	<b>Total Church Committees</b>	<b>\$758.74</b>	<b>\$750.00</b>	<b>\$8.74</b>
<b>85000 Music Expenses</b>				
85100	Music, Audio, Visual & Repair	\$0.00	\$0.00	\$0.00
85200	Music and Video Licenses	\$774.71	\$900.00	(\$125.29)
<b>85000</b>	<b>Total Music Expenses</b>	<b>\$774.71</b>	<b>\$900.00</b>	<b>(\$125.29)</b>
<b>89000 Capital Assets</b>				
89100	Building Mortgage - Interest	\$41,906.45	\$43,215.84	(\$1,309.39)
21100	Building Mortgage - Principal	\$13,112.80	\$30,140.64	(\$17,027.84)
<b>89000</b>	<b>Total Capital Assets</b>	<b>\$13,112.80</b>	<b>\$73,356.48</b>	<b>(\$60,243.68)</b>
<b>91000 Office Expenses</b>				
91300	Office Supplies	\$432.44	\$99.96	\$332.48
91310	Postage Expense	\$116.00	\$99.96	\$16.04
91315	Postal Box Rental	\$312.00	\$284.04	\$27.96
91320	Church Phones- Internet	\$3,271.00	\$2,900.04	\$370.96
91325	Copier Expense	\$421.15	\$300.00	\$121.15
91400	Conference Exp.- Staff & Lay Leaders	\$0.00	\$0.00	\$0.00
91410	Bank - EFT Fees	\$1,063.64	\$900.00	\$163.64
91420	Website Expenses	\$704.91	\$1,200.00	(\$495.09)
91430	Computer Software & Training	\$671.46	\$0.00	\$671.46
<b>91000</b>	<b>Total Office Expenses</b>	<b>\$6,992.60</b>	<b>\$5,784.00</b>	<b>\$1,208.60</b>
<b>92000 Operating Expenses - Building</b>				
<b>92010 Building Operations &amp; Maintenance</b>				
92015	Maintenance of Capital Assets	\$0.00	\$3,000.00	(\$3,000.00)
92016	Maintenance and Supplies	\$1,263.16	\$500.04	\$763.12
92017	HVAC Service Contract/Repair	\$1,295.88	\$1,200.00	\$95.88
92018	Cleaning	\$5,780.00	\$4,596.00	\$1,184.00
92019	Weed/Pest Control	\$525.00	\$600.00	(\$75.00)
<b>92010</b>	<b>Total Building Operations &amp; Maintenance</b>	<b>\$8,864.04</b>	<b>\$9,896.04</b>	<b>(\$1,032.00)</b>
<b>92080 Building Security &amp; Protection</b>				
92085	Fire Protection Subscription	\$1,451.27	\$2,300.04	(\$848.77)
92086	Sprinkler - Fire Water	\$0.00	\$0.00	\$0.00
92087	Accura systems	\$1,000.55	\$600.00	\$400.55
<b>92080</b>	<b>Total Building Security &amp; Protection</b>	<b>\$2,451.82</b>	<b>\$2,900.04</b>	<b>(\$448.22)</b>
<b>92100 Utilities</b>				
92155	Electric	\$4,976.93	\$4,500.00	\$476.93
92160	Water - Water	\$2,906.98	\$2,199.96	\$707.02
92161	Water - Wastewater (Sewer)	\$1,081.35	\$999.96	\$81.39
92165	Gas	\$1,036.85	\$650.04	\$386.81
92170	Trash Service	\$2,559.20	\$2,000.04	\$559.16
<b>92100</b>	<b>Total Utilities</b>	<b>\$12,561.31</b>	<b>\$10,350.00</b>	<b>\$2,211.31</b>
<b>92500 Insurance</b>				
92505	Commercial Multi Peril & Liability	\$5,159.95	\$5,556.96	(\$397.01)
92510	Excess Liability - Shared	\$345.00	\$350.04	(\$5.04)
92515	Workers Comp Insurance	\$356.50	\$759.96	(\$403.46)
<b>92500</b>	<b>Total Insurance</b>	<b>\$5,861.45</b>	<b>\$6,666.96</b>	<b>(\$805.51)</b>

Santa Cruz Valley United Methodist Church Profit Loss Statement  
Year End - 2022

SCVUMC Income & Expense Accounts 2022	YTD December	YTD Budget	Variance
<b>92000 Total Operating Expenses-Building</b>	<b>\$29,738.62</b>	<b>\$29,813.04</b>	(\$74.42)
<b>93000 Support Staff</b>			
93130 Bookkeeper - Secretary Wages	\$2,701.00	\$1,440.00	\$1,261.00
<b>93000 Total Support Staff</b>	<b>\$2,701.00</b>	<b>\$1,440.00</b>	<b>\$1,261.00</b>
<b>94000 Pastoral Support</b>			
94510 Sr. Pastor Salary	\$53,145.16	\$46,734.96	\$6,410.20
94520 Sr. Pastor Housing	\$22,800.00	\$22,800.00	\$0.00
94610 Sr. Pastor Pension Plan	\$9,039.60	\$9,039.00	\$0.60
94630 Sr. Pastor Health Insurance	\$14,940.00	\$14,940.00	\$0.00
94710 Sr. Pastor Paid Health Insurance	\$0.00	\$3,084.00	(\$3,084.00)
94800 Sr. Pastor Accountable Reimbursable Exp.	\$792.22	\$2,000.04	(\$1,207.82)
94810 Sr. Pastor Continuing Education	\$299.00	\$500.04	(\$201.04)
94812 Annual Conference Expenses	\$50.00	\$800.04	(\$750.04)
<b>94000 Total Pastoral Support</b>	<b>\$101,065.98</b>	<b>\$99,898.08</b>	<b>\$1,167.90</b>
<b>Total Expense</b>	<b>\$171,309.80</b>	<b>\$222,948.31</b>	(\$51,638.51)
<b>Net Income/(Loss)</b>	<b>\$41,613.71</b>	(\$23,668.99)	\$65,282.10

**Stewart Title & Trust of Tucson**

2955 N Swan Rd  
Tucson, AZ 85712  
(520) 258-4020

File Number: 2015298  
Sales Price: \$737,600.00  
Close Date: 7/10/2023  
Disbursement Date: 7/10/2023

**COMBINED ESTIMATED CLOSING**

Property: 50 E DUVAL ROAD  
GREEN VALLEY, AZ 85622 (PIMA)  
(304-15-020D)

Borrower(s): SANTA CRUZ VALLEY UNITED METHODIST, AN ARIZONA NON-PROFIT  
ORGANIZATION  
PO Box 807  
Sahuarita, AZ 85629

Seller(s): JAMES TROUT ENTERPRISES LLC, AN ARIZONA LIMITED LIABILITY COMPANY  
645 W Paseo Santa Isabel  
Green Valley, AZ 85622

Description	Borrower			Seller		
	P.O.C.	Debit	Credit	P.O.C.	Debit	Credit
<b>Deposits, Credits, Debits</b>						
Sale Price of Property		\$737,600.00				\$737,600.00
Deposit			\$20,000.00			
<b>Prorations</b>						
County Taxes 1/1/2023 to 7/10/2023 @ \$7,553.71/Year			\$3,932.07		\$3,932.07	
Rent Contruction Yard #1 7/10/2023 to 8/1/2023 @ \$350.00/Month			\$248.39		\$248.39	
Rent Suite 20 7/10/2023 to 8/1/2023 @ \$600.00/Month			\$425.81		\$425.81	
Rent Suite 30 #2 7/10/2023 to 8/1/2023 @ \$600.00/Month			\$425.81		\$425.81	
<b>Commissions</b>						
Real Estate Commission to Sonoran Ventures					\$18,440.00	
Real Estate Commission to Tierra Antigua Realty					\$18,440.00	
<b>Title Charges</b>						
Title - Lender's Title Insurance to Stewart Title & Trust of Tucson						
Title - Owner's Title Insurance to Stewart Title & Trust of Tucson					\$2,609.00	
Title - Settlement or closing fee to Stewart Title & Trust of Tucson			\$747.00		\$747.00	
Title - Escrow Processing Fee to Stewart Title & Trust of Tucson			\$100.00		\$100.00	
<b>Government Recording and Transfer Charges</b>						
Recording fees: Deed to County Recorder \$30.00					\$30.00	
<b>Additional Settlement Charges</b>						
Partial Release of Earnest Money to James Trout Enterprises LLC, an Arizona limited liability company					\$5,105.00	
Partial Release of Earnest Money #2 to James Trout Enterprises LLC, an Arizona limited liability company					\$5,105.00	
Full year 2022 Taxes to Pima County Treasurer (POC \$7,553.71 by James Trout Enterprises LLC, an Arizona )				\$7,553.71		
<b>Totals</b>		\$738,447.00	\$25,032.08		\$55,608.08	\$737,600.00

Balance Due FROM Borrower:

\$713,414.92

Balance Due TO Seller:

\$681,991.92

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Santa Cruz Valley UMC Church Council Minutes  
May 19, 2024

Attendance: Sally Rankin, Pastor Sandy Johnson, Marilee Taber, Tom Calabrese, Lenore Calabrese, JJ Johnson, Susan McNeal, Cheyna Aguirre

Meeting called to order at 11:15.

The agenda was approved and the minutes from the last meeting were approved as read.

Garrett is in need of keys for the building #10. Tom to make copies.

Finance Report

\$29,000 is in the checking account, \$25,000 of that amount is for expenditures for the RV lot. Our investment account is at \$389,000. We hope it will be back to \$500,000 as we start saving more money.

Pledged income is falling short.

Conference apportionments are being paid but do not show as paid on our monthly accounting sheets due to the bill coming late each month. We are over budget in several areas. Utilities are under budget year to date. We continue to be approximately \$7,000 in the hole YTD.

Old business

Messy Church- discussion delayed.

RV Storage

The automatic gates are finished, but we are waiting on security to be done. Tom will get the name and number of the security company and follow up. The lighting contractor is not returning calls. The contract has been signed with the camera company and parts have been ordered. The check for their services has been mailed.

We need to change the code on the gate to something other than the preset code it came with. The Website is up and linked to Breeze for payment  
The Facebook Ad is running.

Garden (Friends)

The sprinkler timer needs to be adjusted, Gail will be talking to Luis about doing this. The garden also needs shade. There is money from the grant for Steve to install shade and Rebecca would like to install misters.

Day Program

Carpet needs to be replaced and they would like to replace it with laminate flooring. This would have to be split 50/50, with Steve providing a quote for the installation.

MOTION

JJ moved to accept we split the cost of the new floor in the day program 50/50.

Tom seconded.

Motion carried unanimously

Growth Plan

Invite your friends

Pastor Meredith will continue with more information on this idea.

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Pastor Meredith and Pastor Sandy met this week and Pastor Sandy shared that Pastor Meredith has ideas on church growth, she will follow through with Hatchathon work on the Food truck, she is learning Breeze. All email and apps will be transferred from Pastor Sandy to Pastor Meredith.

It was suggested that we set up an account at Ace or get a credit card rather than our current reimbursement program.

The CPA has informed us that we do not owe taxes on the rental income.

The summer day program for teens may turn into an after school program that would provide continuing income for us.

There are concerns that if Sadie is still recovering from her surgery that no one will be able to run the A/V equipment during service for the next few weeks. Marilee and Susan volunteered to learn.

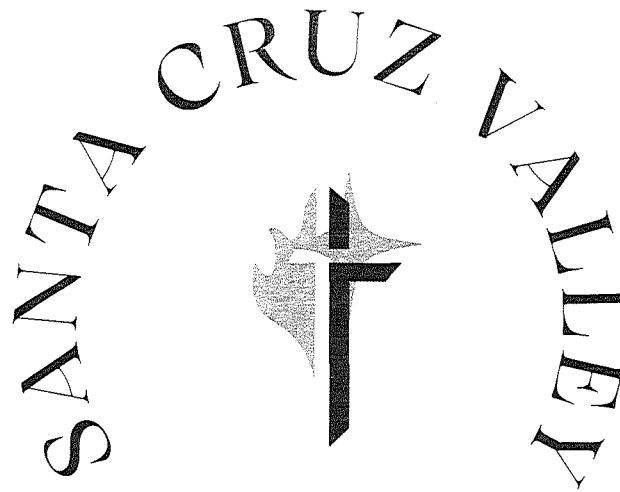
Certificates of Occupancy were submitted for 2 buildings for the day program.

Meeting was adjourned with prayer at 12:06.  
Respectfully submitted,  
Susan McNeal

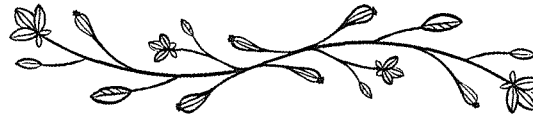
# Upcoming Events

## Lay Servant Course:

Have you ever considered leading meetings for prayer, assisting in worship, or giving leadership in various ministries? There are three categories for laity to serve as Christian leaders for the mission of making disciples for the transformation of the world. Lay Servant Ministries is a leadership development program in the United Methodist Church to equip and empower laypersons. This course is an introduction to lay ministry and will be held in the Tucson area in November.



United Methodist Church



A Church Where Love Lives

&

Everyone is Welcome!



## Get In Touch!

### SOCIAL MEDIA



Santacruzvalleyumcsahuarita



Santa Cruz Valley United Methodist Church

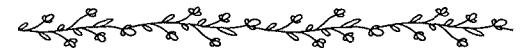
### ADDRESS

50 E Duval Rd  
Green Valley AZ 85614

# SCVUMC Announcements Week of August 11th, 2024

Follow Along with  
Rev. Meredith Joubert in  
your Bible and Hymnal!

- Bible:
  - John 6: 35, 41-51
- Hymnal: UMH
  - Great is Thy Faithfulness #140
  - To God Be The Glory #98
  - Abide With Me #700
  - Joyful Joyful We Adore Thee #89



**SANTA CRUZ VALLEY  
BOAT & RV STORAGE**

Check out our deals with the  
[www.scvrstorage.com](http://www.scvrstorage.com)  
Green Valley Chamber of Commerce!

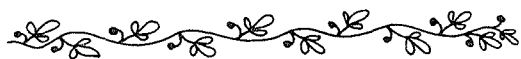
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## Nogales Sonora, Mexico

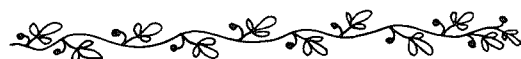
### Day Tour -

Wednesday Oct 23. We will join Border Community Alliance and the Rev. Jerry Haas on a tour across the border to learn about our neighbors, local culture, the work various organizations are doing in social investment, and the various challenges and celebrations in the area. We will be joined by the U.S. Consul General for a conversation and questions. \$95 per person includes lunch at Burrito Haas and afternoon coffee at La Roca. Tour limited to 12 people so sign up soon! You will need a current US passport to cross into Mexico.



## School Supply Drive -

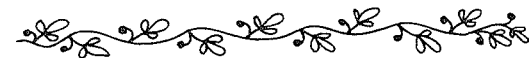
Thank you to everyone who donated school supplies to the students and staff at San Fernando School in Sasabe and also to those who traveled to deliver them!



## Building Congregational Community Safety -

a 4-part Zoom training hosted by Rev. Ellie Hutchison from Good Shepherd UCC. How can congregations build an ecology of community safety that is rooted in care, investing in each other, believing in each other, and trusting each other and the rhythms and cycles around/within us? 5-7pm Aug 19, Sept 9, Sept 23, Sept 30.

Contact Rev. Meredith to register



## Getting to Know You!

Reverend Meredith would like to get to know you and this congregation. She has a few questions and would love for you to email her your answers at [revmerjoubert@gmail.com](mailto:revmerjoubert@gmail.com).

1. What do you love about SCVUMC?
2. What are your big dreams for SCVUMC?
3. What do you think SCVUMC is known for in the community?
4. What do you hope never changes at SCVUMC?
5. What do you think **MUST** change at SCVUMC?

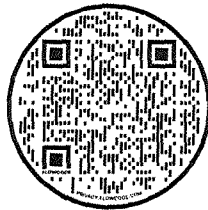
## Sunday Schedule:

*Worshipping in person at 10:00 a.m.  
or on Facebook Live.*

### Open & Affirming Worship Communion 1st Sunday

#### Santa Cruz Valley's Vision:

An accepting church,  
inspired and empowered  
by God to  
serve the world.



*Visit our Website for our  
current schedule of small  
groups and activities.*



**Where LOVE lives and  
EVERYONE is welcome!**

## Small Groups

- Justice Book Studies
- Adult Bible Studies
- Prayer Shawl Ministry
- Share Infant & Pregnancy Loss Support Group

## Events/Community

- Adventures with Friends: we host a day program for adults with developmental disabilities
- Barkorama—Pet Blessings
- Hunger Walk
- Relay for Life
- Tucson Pride
- Sahuarita Creche Festival
- Adventures with Friends (Adult Disability Day Program)  
Contact Assure Healthcare Group of Arizona 480-318-5076



Relay for Life

## Mission in our World:

We participate in the following ministries:

- Café Justo - Fair Trade Coffee
- San Fernando School, Sasabe, AZ: we provide weekend meals, food boxes, Christmas gifts, clothing and school supplies
- The Inn—sheltering migrant families seeking asylum
- Sahuarita Food Bank & Resource Center
- Mexico Mission Trip
- Fill Murry's Suitcase—Africa Mission
- Angel Tree—Salvation Army
- Adopt-A-Roadway
- UMCOR Mission Projects
- The Samaritans of Green Valley/Sahuarita
- Relay for Life



Angel Tree



Food drive for San Fernando School

### Contact Us:

(520) 282-4085

Visit us on the web: [www.scvumc.org](http://www.scvumc.org)  
50 E. Duval Road, Green Valley AZ

### Rev. Meredith Joubert

[pastor@scvumc.org](mailto:pastor@scvumc.org)  
(520) 236-7553



The Mission of Santa Cruz Valley  
United Methodist Church

A multi-generational church, connecting,  
sharing and growing in the love of Christ.



Rev. Meredith Joubert  
and the entire church  
congregation welcome  
you!

At Santa Cruz Valley  
United Methodist  
Church we are  
reimagining how we "do"

church and live our lives as followers of Jesus  
Christ in the United Methodist tradition. We long  
for church to be more than just a building. We  
strive to be more than just "Sunday morning"  
Christians. Our church is a safe haven for all who  
have felt excluded or abandoned by traditional  
churches. We welcome disabled folk, LGBTQIA  
folk and allies, and those who are seeking to meet  
God in the margins of society. We are justice  
seekers and live our lives imitating Jesus.

If you are looking for a church with a huge heart,  
a welcoming and accepting spirit, and a place  
where you can be yourself, we hope you will join  
with us in our mission to Love God and Love the  
World!

Open hearts, Open minds, Open doors:  
The People of The United Methodist  
Church.



**SANTA CRUZ VALLEY  
UNITED METHODIST CHURCH**

**WHAT IF CHURCH WASN'T  
JUST A PLACE WE GO,  
BUT SOMETHING WE DID?**

**RETHINKCHURCH  
SCVUMC.ORG**

**50 E. Duval Road  
Green Valley, AZ 85614**

Our United Methodist heritage is rooted  
in a deep and profound understanding  
of God's grace. This incredible grace  
flows from God's great love for us.

Grace can be defined as the love and  
mercy God gives us because God  
wants us to have it, not because of  
anything we have done to earn it.

We read in Ephesians 2:8-9 (NRSV),  
"For by grace you have been saved  
through faith and this is not your own  
doing; it is the gift of God - not the  
result of works, so that no one may  
boast."

Life can be difficult and through our  
church community many are finding  
purpose, love and family.  
You are invited to join us today!