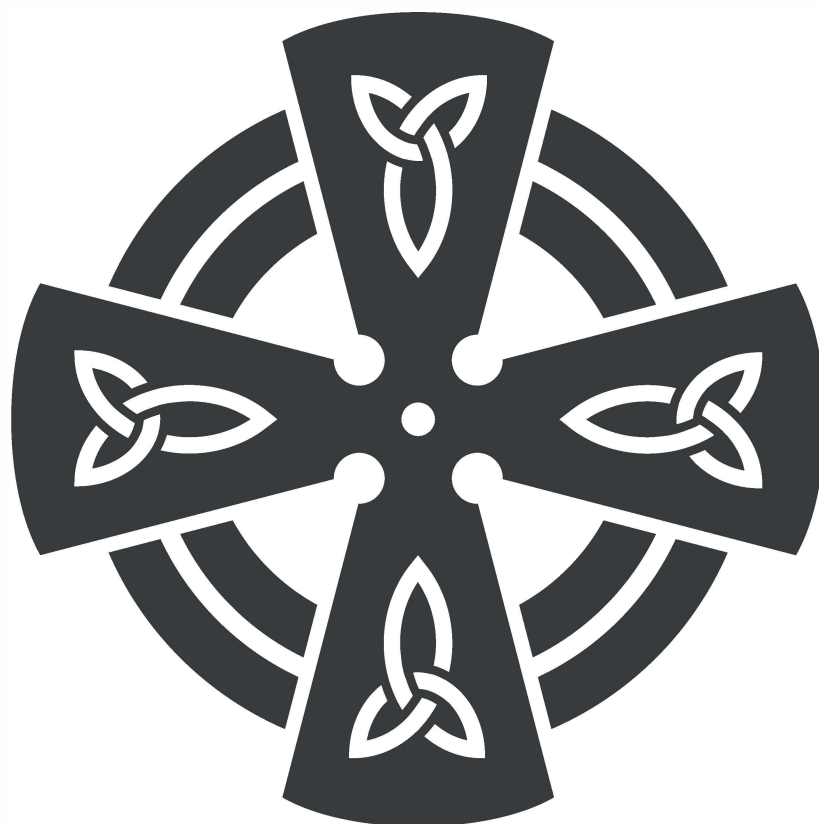




ALAMO HEIGHTS  
UNITED METHODIST CHURCH

# CHARGE CONFERENCE 2024



**ANNUAL REPORT**  
January 7, 2024

Alamo Heights UMC  
Charge Conference Agenda  
January 7, 2024  
3:30 pm in the Sanctuary

- I. Call to Order/Welcome Rev. Dr. Robert Ortiz
  
  - II. Prayer Rev. Jason Adams
  
  - III. Opening Hymn
  
  - IV. Nomination of Church Conference Secretary
  
  - V. Pastor's Report
    - a. 2023 Year End Membership: 5826 Ave. Worship: 495  
Received: 77 Removed: 93 Deceased: 27  
Total Members: 5783
    - b. Naming the Saints/Prayer of Thanksgiving
  
  - VI. Report of the Finance Committee
    - a. Presentation of the 2024 Budget
  
  - VII. Report of the Committee on Nominations and Leadership Development
  
  - VIII. Candidates for Ministry


Darrell Smith	Ryan Jacobson
Chris Estus	Janet Weatherston
- 
- IX. Closing Hymn
- 
- X. Benediction

## Senior Pastor's Report AHUMC 2023

Let's celebrate the very successful year we had financially. I give thanks for your commitment and faithfulness to Jesus Christ. I'm reminded that the church is "the Body of Christ," and if Jesus is to be seen and experienced in this world, Christ will be seen through God's church. The church is God's plan of sharing life, love, and salvation to the world. To love the church is to love Jesus Christ. We have met all our financial obligations for 2023.

- We have had 19 baptisms in 2023.
- We have had 78 new members.
- In person attendance has risen from an average of 418 in 2022 to 495 in 2023. That is an 18.4% increase.
- The livestream attendance has grown from an average of 403 in 2022 to 753 in 2023. That is an 86.8% increase.
- We offered 16 adult discipleship courses with over 370 registered participants in 2023.
- Children's Sunday school attendance has grown from an average 27 in 2022 to 54 in 2023 with a 400% increase in first time visitors.
- We have paid our apportionments to the conference in full for 2023.

We have new challenges ahead in 2024.

- Continue ongoing stewardship programs.
- Explore options for obtaining ongoing revenue.
- Sale of property that was considered for ground lease.
- Continue plans for future capital campaign.
- Focus on growing spiritually through passionate worship and establishing a discipleship process.

I give thanks to God for the faithfulness of AHUMC. Together we have accomplished so much and will continue to build and grow through our service to Jesus Christ.

God bless,

Pastor Jason



# Report of the Pastor

The report of the pastor shall include the names of all persons involved in the changes in membership and other items as outlined in the 2016 *Book of Discipline* (§§ 234, 340). This report should cover as fully as possible the work of the pastor. Care should be taken not to duplicate the reports of the Church Council, committees, organizations, and officers of the charge.

*Copies of this report should be filed with the recording secretary, pastor, district superintendent and chairperson of witness or evangelism ministries.*

Alamo Heights UMC

Church San Antonio

Charge

Las Misiones

District Rio Texas

Annual Conference

For the period beginning December 11, 2022 and ending January 7, 2024

DATE OF PRIOR CHARGE CONFERENCE

DATE OF CURRENT CHARGE CONFERENCE

1. List those who have been received into baptized membership since the last report.  
(Attach as a supplement.)
2. List those who have been received into professing membership since the last report.  
(Attach as a supplement.)
  - a. On profession of faith or restored.
  - b. From other United Methodist churches.
  - c. From other non-United Methodist churches.
3. List those who have been removed from the professing membership since the last report.  
(Attach as a supplement.)
  - a. By action of the Charge Conference, or trial court, or by withdrawal.
  - b. By transfer to other United Methodist churches.
  - c. By transfer to other non-United Methodist churches.
  - d. By death.
4. Have the membership records and rolls been audited (§231)? ☐ Yes ☒ No  
If not, why not?
5. The Pastor shall give a report on the state of the church and an account of pastoral ministry as it relates to (§ 340): providing support, guidance, and training to the lay membership in the church; ministering within the congregation and to the world; and administering the temporal affairs of the congregation. Include as a part of the report a statement outlining the pastor's program of continuing education and spiritual growth for the past year and plans for the year to come (§ 349). (Attach as a supplement.)

Signed

Printed Name Jason Adams

Date

01/03/24

## Report of Pastor / Church Conference 2017-2020

Prepared and edited by the General Council on Finance and Administration and authorized as the official form for this purpose.

## **Baptism, 2023**

Ward Wakely

Scott Harris

Charlotte Reyna

Charles Cibulas

Aimee Victoria

Wyatt Conner

Catalina Conner

Aspen Kilgore

Jovi Moore

Everett DeBard

Penelope Franco

Savannah Mowrey

HannahTom

Julia Tom

William Kilcrease

Georgia Kilcrease

Addison Kilcrease

Alicia Pryce

Finley Ferguson

**Total**

**19**

**Received from other Methodist Dec. 2022**

Lisa Warren

**Received from other Methodist 2023**

Natalie Riser  
 Jesse Castillo  
 Shirley Yankowski  
 Marguerite Blankenship  
 Jim Ernst  
 Craig Harlow  
 Kelly Harlow  
 Brian Brust  
 Scott Bryan  
 Helen Bryan  
 Marie McClendon  
 Joel Anderson  
 Thomas Murrah  
 Jean Moore  
 Beverly Cunningham  
 Bonnie Cabeza  
 Billy R. Arnette  
 Joshua Euton  
 Courtenay Euton  
 Marcy Loehman  
 Ryland Brem  
 Barbara Brem  
 Mark Weaver  
 Kathryn Weaver  
 Tony Lobasso  
 Carrie Lobasso  
 Cody Weiser  
 Tiffany Weiser  
 Taylor Limbaugh  
 Rowan Rankin  
 Augustus Weiser  
 Olivia Weiser  
 Aimee Victoria  
 Pat Woodbury  
 Gabrielle Girling  
 Gus Howard  
 Wade Turner  
 Gaye Lyn Turner  
 Lewis Herbeck, Jr.  
 Don Moline  
 Susan Moline

**Total including 12/22      42****Total for both Columns    77****Received Profession of Faith 2023**

Peter Swallow  
 Kathy Swallow  
 Anne Kilpatrick  
 Scott Harris  
 Cheryl Wilson  
 James Jacobson  
 Sherry Dugan-Jacobson  
 Allison Craig  
 Ignacia Kilgore  
 Samuel Kilgore  
 June Hubbell  
 Mickey Parsons  
 Clara Sine  
 Whitney Kilcrease  
 Mavis Jacobson  
 Kylea Jacobson  
 William Kilcrease  
 Alicia Pryce  
 Robert Franco  
 Kelli Franco  
 Brittany Tom  
 Jonathan Tom  
 Christina Valadez  
 Hector Valadez  
 Randy Holmes  
 Tim McLallen

**Total                      26****Received from Non-Methodist Dec. 2022**

James L. Smith

**Received from Non-Methodist**

Misty Brust  
 Kathryn Plumly  
 Luis Cabeza, Jr.  
 Shawn McLallen  
 Patsy Roe  
 Karen Roe  
 Gayle Anderson  
 Mark Anderson

**Total                      8 + 1 = 9****Total for column              35**

**2022 Withdrew**

Erik Andersen  
 Marisa Andersen  
 Laurie Baumann  
 Richard Band  
 Alison Band  
 Katherine Band

**TOTAL 6**

**Withdrew 2023**

Fred Soupiset  
 Pat Soupiset  
 Mike LeMond  
 Julie LeMond  
 Lance Tatum  
 Beth Weakley  
 Steve Weakley  
 Richard Wagner  
 Angelia Wagner  
 Analiese Wagner  
 Abigail Wagner  
 Donna Nicolson  
 Bailey Nicolson  
 Shawn Nicolson  
 Hugh Boyd  
 Sandy Boyd  
 Peter Ellis  
 Susan Ellis  
 Clark Boddy

Jane Boddy  
 Chris Boddy  
 Cooper Boddy  
 Elizabeth Boddy  
 George Woods  
 Barbara Woods

**6 + 25= 31**

**Withdrew cont.**

Grace Hawkes  
 Jenna Hawkes  
 Hannah Hawkes  
 Jeanette Draves  
 Sam Bright  
 Elaine Bright  
 Anita Evans  
 Sheldon Fitch  
 Lori Fitch  
 William Fitch  
 Marshall Fitch  
 Neil Perry  
 Alexandra Sanchez  
 Leslie Edwards  
 William Edwards  
 Alice Shaffer  
 Jeanie Wehmeyer  
 Andra Charlton  
 Barrett Miller  
 Jais Ludwig  
 Matthew Parker  
 Adam Parker  
 Kathy Swallow  
 Pete Swallow  
 J.B. Gouger

**25**

**Transferred to  
 Non-Methodist  
 2023**

Jenny Hutchison

1 + 25= 26

**Transferred to  
other UMC 2023****Dec. 2022**

Katie Adkison  
 Jason Adkison  
 Phala Lee  
 Fred Fraley  
 Patrick Ballantyne

**Total 5**

**2023**

Ross Studer  
 Jan Studer  
 Stan Studer  
 Janie Keator  
 Ted Keator  
 Pat Swann  
 Diane Littleton  
 Lori Conger  
 Mary Ann Barber  
 Ken Barber  
 Blair Stouffer  
 Sheryl Stouffer  
 Blake Stouffer  
 Len Funari  
 Janet Funari  
 Julee Guinn  
 Julie Freshwater  
 Hunter Conger  
 Jack Nahoum

Harper Nahoum  
 Jackson Nahoum  
 Lindsey Nahoum  
 Isabel Badouh  
 Carol Conger  
 Jeannette Draves  
 Rebecca Corrigan  
 Thomas Lyle III, Trip  
 Erin Tatum  
 Jennifer Mery  
 CC Mays  
 Barbara Greenough

5 + 31 = 36

**Total for column 36**

**Total for columns 93**

## **Death 2023**

### **Death 2020**

Lois Jones

### **Death 2021**

Emma C. Gonzales

Tom E. Nolen

### **Death 2022**

Drew Rogers

Ralph Yarbrough

### **Death 2023**

Preston Dial

Randy Penn

Jay Davis

Michael Ramirez

Warren Hart

Jane Bowers

Jacob Johnson

Wanda Riley

Clifton Douglass, Jr.

Red McCombs

Diane Froehner

Thelma Hughes

Lucy Jo Sherrill

Susie Strickland

Mary Ann Hollingshead

John Hannah

Stephen Miller

Darse Kelly

Tom McDonnell

Donna Bechhold

Ray Kelsey, Sr.

Mary Leonard

**Total**

**27**





# Report of the Finance Committee

The report of the Finance Committee shall be made on this form, or one revised and adapted by the Annual Conference. Numbers in parentheses refer to paragraphs of the 2016 *Book of Discipline*.

*Copies of this report should be filed with the recording secretary, pastor, district superintendent and chairperson of the committee on finance*

Alamo Heights UM Church Alamo Charge  
 Las Misiones District Rio Texas Annual Conference

For the period beginning December 11, 2022 and ending January 7, 2024  
DATE OF PRIOR CHARGE CONFERENCE DATE OF CURRENT CHARGE CONFERENCE

## I. ORGANIZATION

1.a. Has the committee been organized according to the 2016 *Book of Discipline* (§258.4)? ☒ Yes ☐ No

b. Names of officers?

Chairperson Dianne Dorsett Vice Chairperson Johnny Boyd  
 Treasurer(s) Valerie Slade Financial Secretary Jeff Guillory

## II. BUDGET AND COMMITMENT PLAN

2.a. Has the committee submitted to the Church Council, or its equivalent, a complete budget for the ensuing year? ☒ Yes ☐ No

If not, why not?

b. Did the committee give the Church Council an opportunity to request financial support for recommended ministries (§258.4)? ☒ Yes ☐ No

If not, why not?

3. How frequently does the Financial Secretary/Treasurer send members and contributors regular reports of their giving?  
☐ Monthly ☒ Quarterly ☐ Semi-annually ☐ Annually ☐ No, we do not send reports

4. Is giving by individual participants in the local church regularly reviewed? ☒ Yes ☐ No;  
 If not, why not?

5. What are the plans for raising sufficient income to meet the budget adopted by the Church Council (§258.4)?

Stewardship campaign, quaterly financial updates, weekly offering, Foundation support

6. Does the Financial Secretary/Treasurer report regularly to the Church Council on the giving trends in the church/charge? ☒ Yes ☐ No

If not, why not?

### III. THE HANDLING OF CHURCH FUNDS

7. Does the Treasurer regularly make reports to the Committee on Finance and the Church Council on the financial position of the church (§258.4b)? ☒ Yes ☐ No

If not, why not?

8. Are all benevolences and other connectional funds remitted monthly to the conference treasurer (§258.4b)?

☒ Yes ☐ No

If not, why not?

9.a. What bank(s) have been designated by the Church Council as a depository (§258.4d)?

Frost Bank

b. Are all accounts FDIC insured and in amounts at or below the current FDIC insurable limit? ☐ Yes ☒ No

If not, why not?

Our account frequently exceeds \$250K in order to meet all operating expenses.

c. Are all accounts in the name of the church? ☒ Yes ☐ No

If not, why not?

10.a. Has the committee established written financial policies to document the internal controls of the local church (§258.4d)? (Attach as a supplement.) ☒ Yes ☐ No

b. Have these policies been reviewed by the committee and found to be adequate and effective (§258.4d)?

☒ Yes ☐ No

11. Are the church offerings counted by a counting committee in accordance with the mandates of the Discipline (§258.4a)? ☒ Yes ☐ No

If not, why not?

12. Are all funds deposited promptly in accordance with procedures developed by the Committee on Finance

(¶258.4a, d)? ☒ Yes ☐ No

If not, why not?

13. Are financial officers of the church bonded (¶258.4b)? ☒ Yes ☐ No

If not, why not?

14.a. Have the financial records of the church and all its organizations been audited for the prior fiscal year (¶258.4c)?

☐ Yes ☒ No

b. If not, why not?

Church engages audit firm to prepare compilation, thoroughly reviewed by Fin. Cte.

c. Were there any recommendations or exceptions? ☐ Yes ☒ No

d. If there were recommendations or exceptions, how has the church addressed them?

Signed



Printed Name:

Dianne Dorsett

Date:

December 11, 2023

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**Report of the Finance Committee 2017-2020**

Prepared and edited by the General Council on Finance and  
Administration and authorized as the official form for this purpose.

**Alamo Heights United Methodist Church  
2024 PROPOSED BUDGET**

**Revenue:**

	2021 Actuals	2022 Budget	2022 Actuals	2023 Budget	Projected 2023 Actuals	2024 Budget	Budgeted % of Revenue	2024 \$ Net Change From 2023	2024 Budgeted % Change
General Revenue	2,425,388	2,532,530	2,424,907	2,532,530	2,464,783	2,608,506	86.18%	75,976	3.00%
Plate Cash	32,281	27,000	40,538	32,000	52,617	50,000	1.65%	18,000	56.25%
Prior Year	6,581	2,000	1,470	2,000	28,365	2,000	0.07%	-	0.00%
Use of Facilities-Wedding	9,826	5,000	12,286	5,000	6,976	7,000	0.23%	2,000	40.00%
Use of Facilities-Other	65,378	61,000	58,142	61,000	74,457	74,000	2.44%	13,000	21.31%
Interest	33,000	32,000	37,311	33,000	52,718	56,000	1.85%	23,000	69.70%
AHUMC Foundation	375,000	300,000	300,000	402,250	402,250	229,348	7.58%	(172,902)	-42.98%
Asbury General	19,302	-	4,496	-	890	-	0.00%	-	0.00%
Asbury Use of Facilities	44,650	23,000	21,125	-	-	-	0.00%	-	0.00%
Other Income	-	-	1,550	-	-	-	0.00%	-	0.00%
<b>Total Revenues</b>	<b>3,011,406</b>	<b>2,982,530</b>	<b>2,901,825</b>	<b>3,067,780</b>	<b>3,083,056</b>	<b>3,026,854</b>	<b>100.00%</b>	<b>(40,926)</b>	<b>-1.33%</b>

**Expense:**

**Salaries:**

**Ministers**

**Housing**

**Lay Staff**

**Childcare Workers**

**Total Salaries**

**Benefits:**

**Health Insurance**

**Payroll Taxes**

**403(B)/GPF**

**Workers Comp**

**Minister's Retirement**

**Total Benefits**

**Total Salaries & Benefits**

**Fixed Costs:**

**Apportionments\*\***

**Mission Community**

**Technology Services**

**Communications**

**Administration**

**Insurance**

**Maintenance**

**Asbury Community**

**Programs**

**Total Fixed & Program Costs**

**SubTotal Salaries & Fixed Costs**

**Projected Surplus/Deficit**

**Expected Tax Credit To Be Applied**

**Expected Surplus To Be Applied**

350,664	351,345	274,981	300,209	253,670	228,000	7.53%	(72,209)	-24.05%
235,628	240,782	190,803	160,200	194,262	191,700	6.33%	31,500	19.66%
883,893	936,622	921,927	991,817	927,030	1,043,958	34.49%	52,141	5.26%
31,199	50,036	40,423	50,036	49,985	50,036	1.65%	-	0.00%
<b>1,501,384</b>	<b>1,578,785</b>	<b>1,428,134</b>	<b>1,502,262</b>	<b>1,424,947</b>	<b>1,513,694</b>	<b>50.01%</b>	<b>11,432</b>	<b>0.76%</b>
219,242	255,960	218,521	266,292	229,005	263,316	8.70%	(2,976)	-1.12%
69,703	72,803	68,995	70,000	76,881	75,989	2.51%	5,989	8.56%
34,823	40,000	27,016	40,000	27,208	38,573	1.27%	(1,427)	-3.57%
8,104	11,000	9,754	10,000	9,787	9,000	0.30%	(1,000)	-10.00%
66,545	73,000	56,858	56,562	50,723	45,210	1.49%	(11,352)	-20.07%
<b>398,417</b>	<b>452,763</b>	<b>381,144</b>	<b>442,854</b>	<b>393,604</b>	<b>432,088</b>	<b>14.28%</b>	<b>(10,766)</b>	<b>-2.43%</b>
<b>1,899,801</b>	<b>2,031,548</b>	<b>1,809,278</b>	<b>1,945,116</b>	<b>1,818,551</b>	<b>1,945,782</b>	<b>64.28%</b>	<b>666</b>	<b>0.03%</b>
170,964	221,788	199,965	274,000	274,000	260,300	8.60%	(13,700)	-5.00%
2,641	4000	1637	4000	789	3,000	0.10%	(1,000)	-25.00%
22,680	35,312	25,198	33,312	33,869	33,312	1.10%	-	0.00%
62,940	141,180	124,725	138,180	137,811	106,191	3.51%	(31,989)	-23.15%
36,717	55,700	39,017	58,700	41,573	53,700	1.77%	(5,000)	-8.52%
92,135	97,000	103,399	121,000	119,354	120,000	3.96%	(1,000)	-0.83%
554,012	498,435	483,668	498,435	480,590	498,435	16.47%	-	0.00%
57,033	28,500	25,133	0	1,269	0	-	-	-
133,414	146,512	121,879	141,012	125,239	137,640	4.55%	(3,372)	-2.39%
<b>1,132,536</b>	<b>1,228,427</b>	<b>1,124,621</b>	<b>1,268,639</b>	<b>1,214,494</b>	<b>1,212,578</b>	<b>40.06%</b>	<b>(56,061)</b>	<b>-4.42%</b>
<b>3,032,337</b>	<b>3,259,975</b>	<b>2,933,899</b>	<b>3,213,755</b>	<b>3,033,045</b>	<b>3,158,360</b>	<b>104.34%</b>	<b>(55,395)</b>	<b>-1.72%</b>
<b>-20,931</b>	<b>-277,445</b>	<b>-32,074</b>	<b>-145,975</b>	<b>50,011</b>	<b>-131,506</b>			
	<b>192,000</b>		<b>145,975</b>		<b>TBD</b>			
	<b>85,445</b>		<b>0</b>		<b>TBD</b>			

## **BOS for 2024**

	<b><u>Ends</u></b>
David Kinder-Chair BOS	2026
Secretary	N/A

## **Executive Committee-2024**

David Kinder-Chair BOS	2026
To be elected-Chair Trustees	
To be elected-Chair Foundation	
Carol Cauley-Chair SPRC	2024
Johnny Boyd - Chair Finance	2025
Dan St. Romain-Lay Leader	N/A

## **At-Large-2024**

Doran Dennis	2025
Brian Griffin	2025
James L. Smith	2026

## **Finance Committee-2024**

Johnny Boyd/Chair Finance	2025
Charles Johnson	2024
Hill Ojeda	2026
Trustee Chair - To be elected	
Dan St. Romain - Lay Leader	N/A

## **Trustees-2024**

Chair - To be elected	
Brian Nash	2024
Steve Waters	2025
Thad C. Ziegler	2026
Dan St. Romain - Lay Leader	N/A

## **SPRC-2024**

Carol Cauley - Chair	2024
Jack Rodgers	2024
Pat Crump	2025
Amy Willcox	2025
Dan St. Romain - Lay Leader	N/A

## Board of Stewards 2024

### **Nominations-2024**

Chair – Jason Adams, Senior Pastor	N/A
Emily Jones	2024
Thad C. Ziegler	2024
Ginger Brewer	2024
Clay Person	2025
Sarah Ojeda	2025
Craig Woodworth	2025
Niki Burnam	2026
Lindsay Evans	2026
Kresta Wright	2026
Dan St. Romain – Lay Leader	N/A

### **Foundation-2024**

Chair – To be elected 2024	
Senior Pastor – Jason Adams	N/A
Treasurer – Valerie Slade	N/A
Chair of Finance (Advisory)– Johnny Boyd	2025
Ross Evans	2024
David Reed	2024
Roger Lind	2024
Ed Benson	2024
Bill Armstrong	2025
Clarence Bray	2025
Lavonne Garrison	2025
Cathy Johnson	2025
Ann Walton	2025
Tracy Vardiman	2026
Paul Darr	2026
Renee Kizziar	2026
Erin Drawert	2026

### **Delegates to Annual Conference 2024**

Bonnie Cundiff  
Robert Cundiff  
David Kinder  
Vickie Kinder  
Dan St. Romain  
Priscilla St. Romain  
Chip Slade  
Valerie Slade  
Tony Lobasso  
Carrie Lobasso

## **Candidates for Ordained/Licensed Ministry 2024**

### **Renewals**

Chris Estus  
Ryan Jacobson  
Darrell Smith  
Janet Weatherston



# Report of the Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report

(¶ 2550). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2016 Book of Discipline.

*Copies of this report should be filed with the recording secretary, pastor, district superintendent and the board of trustees.*

Alamo Heights UMC

Church

Alamo Heights UMC - San Antonio

Charge

Las Misiones

District

Rio Texas

Annual Conference

For the period beginning December 11, 2022

DATE OF PRIOR CHARGE CONFERENCE

, and ending January 7, 2024

DATE OF CURRENT CHARGE CONFERENCE

1. Organization for the present conference year was effective (date) 12/11/2022 by electing the following officers (no less than three, and up to nine persons):

Name	Term Expires
President Steve Waters	2025
Vice President Scott Boynton	2023
Secretary Brian Nash	2024
Treasurer Valerie Slade	
Member Dan St. Romain - Lay Leader	
Member	
Member	
Member	
Member	

2. Is the local church incorporated (¶2529.1a)? ☒ Yes ☐ No

3. a. Name or names in which title to each piece of property is recorded, as shown by civil land records (¶¶2536, 2538):

Name(s)	Office	Book	Page
Church Buildings AHUMC	Bexar County	5188	1912
Church Buildings			
Parsonages			
Parsonages			
Other			
Other			

- b. Who is the custodian of deeds and other legal papers? Valerie Slade

- c. Where are they kept?

Church Office

4. Does each deed contain trust clause (¶2503)? ☒ Yes ☐ No

5. Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate? ☒ Yes ☐ No

6. a. Insurance (¶2533.2, 2550.7)



Item Insured/ Insurance	Replacement Value	Amount of Coverage	Type of Coverage	Company	Restricted By Coinsurance (Yes or No and amount)		Expires When
Church Buildings	\$ 24,229,803	\$ Same	Limited All Risk	Church Mutual	Y <input checked="" type="checkbox"/>	Amount::	01/01/2024
Parsonages	\$	\$			Y <input type="checkbox"/>	Amount::	
Church Furnishings and Equipment	\$ 24,229,803	\$ Same	Limited All Risk	Church Mutual	Y <input checked="" type="checkbox"/>	Amount::	01/01/2024
Parsonage Furnishings and Equipment	\$ NA	\$			Y <input type="checkbox"/>	Amount::	
Vehicle(s)	\$ NA	\$			Y <input type="checkbox"/>	Amount::	
General Liability		\$ 6000000	Umbrella	Church Mutual	Y <input type="checkbox"/>	Amount::	01/01/2024
Worker's Compensation				Church Mutual	Y <input type="checkbox"/>	Amount::	01/01/2024
Directors and Officers/Errors and Omissions/Crime		\$ 1000000	Liability	Great American Zurich	Y <input type="checkbox"/>	Amount::	01/01/2024
Professional Liability Coverage (Including Sexual Misconduct)		\$ 3000000	Liability	Church Mutual	Y <input type="checkbox"/>	Amount::	01/01/20 24

b. Have the buildings been inspected for fire and other safety hazards within the past year? ☒ Yes ☐ No

c. Have you assessed the of replacement value within the last 5 years? ☒ Yes ☐ No

d. Who performed the assessment? Church Mutual

e. Does the church have a Safe Sanctuary Policy? ☒ Yes ☐ No

f. Is the amount of insurance adequate? ☒ Yes ☐ No

(to determine adequacy of coverage, please use the GCFA Insurance Worksheet found at <http://www.gcfa.org/gcfa-united-methodist-church-minimum-insurance-requirements/>)

7 a. Has an annual accessibility audit for church properties been conducted (§ 2533.6)? ☒ Yes ☐ No  
(attach as a report; an example accessibility audit form may be found at <http://www.gcfa.org/forms-and-resources/>)

b. If needed, have you developed an accessibility plan? ☐ Yes ☒ No (Attach plan)

8. Provide a detailed list of income-producing and permanent funds:

Item	Date Received	Amount	Where Invested	Income	How Income is Used for Ministry
Cash Loan Funds, Mutual Funds, Stock Certificates	October 2023 & Prior	4,577,905	Wells Fargo and Fidelity Investments	125,873	Operations, Capital Expenses, etc. Specific Ministry
Endowment Funds	October 2023 & Prior	5,685,450	Texas Methodist Foundation	715,980	Planning Budget, Music Ministries, & Children

(Attach as a supplement a statement \*clarifying the manner in which these investments made a positive contribution toward the realization of the goals outlined in the Social Principles of the church and showing the investments are socially responsible. § 2533.5 and § 2550.9)

President of Trustees

Steve Waters

Printed Name: Steve Waters

Date: November 30, 2023

## Annual Report of the Board of Trustees, 2017-2020

Prepared and edited by the General Council on Finance and Administration and authorized as the official form for this purpose.

## 2023 Charge Conference Report - Rev. Donna Strieb

I am blessed to continue serving on staff at Alamo Heights UMC as a retired Deacon, part-time. This is my 44<sup>th</sup> year of being a part of the wonderful staff at AHUMC. As Pastor of Spiritual Formation, I focus on three primary areas...teaching, worship, and ministry with senior adults. Ministries include:

- Teaching a hybrid (in person and on Zoom) *Tuesday Morning Class* with 30-40 class participants attending. In the spring we studied Adam Hamilton's book, *Luke: Jesus and the Outsiders, Outcasts, and Outlaws*, and this fall we used Amy Jill Levine's *Signs and Wonders: A Beginner's Guide to the Miracles of Jesus*. Since moving the class from Thursday to Tuesday, attendance has nearly doubled.
- Leading the monthly *Taizé* prayer services on the first Wednesday of the month that are offered both in person and via livestream. We have been offering this service for 24 years.
- Serving as liturgist in the traditional worship services each week.
- Serving as staff liaison with our *Thursday Lunch Bunch* for senior adults. This ministry provides fellowship and a hot meal for seniors, the majority of whom are not members of AHUMC. We also host 24 adult persons with special needs from Reaching Maximum Independence. This was made possible by a grant from the Methodist Healthcare Ministries. We also host an Alzheimers Support Group for lunch. This year we celebrated our 50<sup>th</sup> Anniversary of the Thursday Lunch Bunch with a wonderful event on September 29. Special guests included Bishop Robert Schnase and our Las Misiones District Superintendent Robert Ortiz, former Lunch bunch Team Members from past years, and other guests totaling just over 200 persons. Once a month we also host a Retired Pastors group known as OWOPS (Old Worn Out Pastors). In December we host the Holiday Delight, a special seasonal event to celebrate Advent/Christmas with 200+ persons attending.
- Serving as the staff liaison with the Chancel Guild that prepares the sanctuary for special holy days and the seasons of the Christian Year.
- Offering pastoral care as needed, including officiating at eleven (11) funerals, one wedding, and occasionally visiting hospitals.
- I also serve as a member on the Academy for Spiritual Formation Council of the Rio Texas Conference.

I hope to continue serving in these ministries for 2024 as I seek to faithfully serve Christ and the wonderful people at Alamo Heights United Methodist Church and in our community.

Respectfully,

Rev. Donna Strieb, Pastor of Spiritual Formation Ministries (Part-time Retired)

We have experienced a wonderful year of ministry in the area of Mission and Outreach because the people of Alamo Heights UMC are very generous. We have worked to connect with our neighbors and meet the needs of people living in our community. Many Sunday School classes continue the generosity of creating blessing bags for our houseless neighbors on the street. We have also offered blessing bags to the immigrant asylum seekers on San Pedro Ave.

We continue to partner with the Wesley Nurse, Sonia Serna Gonzalez, in many ministries. Sonia is especially helpful to our Hope Center clients, providing them with resources and a listening ear. The Hope Center also increased their hours so that they could meet more needs. We have hosted a few food pantry drives to keep the shelves of the Hope Center stocked.

We offered Cardboard Kids during April for Child Abuse Awareness Month, and we will have more Cardboard Kids available to decorate and post in 2024. We will be seeking to partner with Ransomed Life to educate and help parents protect their children.

We met weekly during the summer months to pray for the mission and outreach of AHUMC. We prayed in Mission Central, West 102, and on Zoom with a desire to seek where God is already at work in our neighborhoods. A few members also gave their time and talents to help with the summer reading at Project Transformation. In September, we enjoyed 55 volunteers making bunk beds for Sleep In Heavenly Peace. We discerned the need to partner with the Good Hood, providing blankets for their neighbors when the weather is cold. We also collected gently used eyeglasses for I Care.

We had a wonderful October in the Pumpkin Patch and raised \$16,000.00 for area missional ministries. So many volunteers helped make the Pumpkin Patch a success by unloading 44,000 lbs. of pumpkins and selling pumpkins in literally all types of weather.

I cannot say enough good things about the Garden Team and their efforts to beautify the garden area by planning, gathering tiles, and inviting others into the process of making 78 garden pavers that will encircle the garden with love. AHUMC Garden is growing relationships.

Our Mission and Outreach Taskforce decided on the Manger Donations for the Advent Season. Every offering to the manger will be focused on meeting children's basic needs. Our Alternative Christmas Cards will bless five ministries where we have people from our congregation involved in mission and outreach.

There are still so many opportunities to be a good neighbor. It is an exciting time to be at AHUMC.

Peace,

Pastor Janet Weatherston

## **Darrell Smith, Pastor of Discipleship and Communications 2023**

2023 has been a year of development and growth. The Communications Team continued to build processes to enhance the flow of information both within AHUMC and outside the church. Toward the end of the spring, we learned that Sarah Smith, our Assistant Director would be moving to Hawaii. Sarah's departure was certainly a loss but, as she had throughout her career at AHUMC, she helped us with diligent work and preparation for her transition. Part of that work included leading the search for the hiring of a new Graphic Designer. We were extremely blessed to find and hire Angelina Vannicola—who joined the team in September. Angelina joins the AHUMC Communications Team after serving as the Communications Director at Fredericksburg UMC for the last three years. We are grateful for the tenure and service of Sarah Smith as well as the arrival of Angelina Vannicola as she is already raising the bar for our team.

In addition to responding to the communication needs of the congregation throughout the year, our Communications Team undertook an initiative to design and build an online database for volunteer opportunities in and through AHUMC. This was an enormous undertaking that involved developing consistent data markers for over forty distinct volunteer opportunities and building an accessible and searchable interface that would allow end-users to easily learn about and find places of connection and service. Our Digital Content Coordinator, Cristian Ortiz, served as project lead and was instrumental in creating “Role Call” ([ahumc.org/volunteer](http://ahumc.org/volunteer))—which now serves as the volunteer hub for the church.

In addition to overseeing all the audio, visual, and information technology systems, Adam Crowell's leadership and steadfast work led to the creation of a new Technical Arts Department within the Communications structure at AHUMC. Adam and his fledgling team of volunteers are growing this department steadily with each installation and technological improvement on our campus.

Our year in adult learning and discipleship continued in the recognition that disciples are not mass-produced, and they are not created with the flip of a switch. Living into the life of a disciple—someone who lives out the love and teaching of Jesus the Christ—takes time. In fact, the process of living as a disciple is a lifetime endeavor that requires lots of space and lots of love. It is our hope that our efforts in discipleship formation continue to be reflective of both the time and space needed for discipleship as well as our scriptural and historical tradition.

We continue to develop and offer educational and dialogical opportunities within the community of faith that create opportunities for relationship building as well as encourage, edify, and sustain disciples. In January 2023, AHUMC began the semester by hosting eight unique, staff-led courses, including a new meditative

yoga offering that quickly became the church's most attended course with over fifty participants each week.

We launched our fall semester in September with eight new staff-led courses, ranging from six to fourteen weeks in length. Throughout the year, all of AHUMC's course offerings are free to any interested participants. Moreover, all our courses are offered both in-person and online.

Our efforts to survey the hundreds of participants who engaged one of AHUMC courses in 2023 garnered over 200 completed online surveys. Survey respondents overwhelmingly affirmed our efforts to provide for both the education and connection of disciples.

- 99% of respondents indicated that they had recommended AHUMC's courses to someone else or would in the future.
- 97% of respondents reported that their participation in the course had led to new relationships and connection with others.
- 87% of respondents attributed their course participation to encouraging them as a disciple of Jesus the Christ.
- 96% of respondents rated their overall experience of a course at AHUMC as positive.

AHUMC is committed to offering a wide array of opportunities for the education, encouragement, and equipping of disciples. The spring semester of 2023 will feature another roster of staff-led courses. Opportunities for discipleship connection, study, and growth at AHUMC are not limited, however, to educational opportunities alone. We continue to support Sunday school classes, study groups, support groups, and recovery groups at AHUMC. In addition to providing resource and communication support to these groups, we also help our groups and classes adapt to the hybrid environment of meeting in-person and online simultaneously. It is our hope to continue supporting our existing groups as well as creating an encouraging environment for the foundation of new ones.

2023 has been a year of growth and transformation. Our community is blessed with a steadfast and strong group of disciples who recognize their training as calling them to inner work, love, and action.

## **2023 Charge Conference Report Modern Worship, Recovery, Wedding, and Care Ministries**

2023 has been a busy and fruitful year in ministry for the various ministry areas I oversee. As the year began, I held the position of Pastor of Congregational Care. At the time of the writing of this report, I am in a new position as the Teaching Pastor of the Modern Worship community at AHUMC.

As Pastor of Congregational Care, I continued to serve our church and community through the many avenues of care. Hospital and Home visits, oversight of our prayer ministries, walking with families through both weddings and funerals, pastoral counseling, and more have always been deeply meaningful work for me.

Rev. Linda Baumheckel began to fill this position in June 2023 as I began my own transition into my new role. Under her supervision, the Care ministry continues to flourish. She has especially lifted our prayer and Stephen's Ministry opportunities. AHUMC continues to offer care to our community in many different ways. We stay in contact with members who are isolated due to various ailments. We visit those in hospitals. We offer support for those with long-term needs. We offer pastoral and lay care to those grieving. We travel with communion. We offer spiritual counseling. We are connected with professional counselors with many different specialties. We pray for the healing of our people and our world. We also hosted 19 weddings at AHUMC this year, while offering support, training, and counseling to a number of weddings off campus.

At the beginning of the year, Rev. Robert Ortiz asked if I would like to preach our Lenten Series in the Modern Worship service. I gratefully accepted. During that season, as we learned that Rev. Ortiz would be appointed as the new District Superintendent, I was asked to fill the role as the Modern worship Teaching Pastor. I again gratefully accepted, formally stepping into that role in June.

The post-COVID pattern of a steady increase in attendance has continued. In December 2022 we averaged 74 people. In the last several weeks, our average has been just over 100. As our church continues to grow, I am encouraging this community to embrace participatory faith both in our services and in our community outside of Sunday mornings. It is great to see new faces not only attending, but becoming actively involved in the life of the church.

The Modern Worship team has experienced several changes in pastoral leadership in the last couple of years. This requires flexibility and care as the team adapts to new style preferences and worship formats. I have seen firsthand how flexible the music team can be throughout these transitions. The team makes a diligent effort to create a worship space that calls musicians from all walks of life, giving them a safe place to be who they are called to be. The worship team is excited to continue the journey and looks forward to the upcoming year.

After gaining the recommendation of the DCOM to the BOM for ordained ministry as an Elder, I have also spent much of this year preparing for this next step in ministry. Just last week, I turned in my completed BOM packet and look forward to interviews in the spring.

Under the leadership of Rev. Chris Estus, our recovery ministry continues to thrive. Through the Recovery Ministry, AHUMC hosts 6 different 12-Step Recovery Fellowships. Included are Alcoholics Anonymous, Debtors Anonymous, Adult Children of Alcoholics and Dysfunctional Families, Sexaholics Anonymous, Sex and Love Addicts Anonymous, and our own Pioneer Group. These groups hold 11 meetings per week in the West Wing. Weekly attendance is between 125 and 150 people.

AHUMC is a growing church. We are growing in numbers, but more importantly, we are also growing in love as we engage in discipleship to Jesus the Christ. We have much to celebrate as the year closes. And we have much to anticipate as we enter an exciting new year!

**Submitted by Rev. Ryan Jacobson**

**In partnership with Rev. Linda Baumheckel, Rev. Chris Estus, Nance Haney, and AJ Navarro**

**December 12, 2023**

## Charge Conference Report 2023 Music and Worship Ministry

The purpose of the Music and Worship Ministry is to serve the congregation in weekly worship through art and music. Through the gifts of music, poetry, hymns, prayers, and visual art, we consider it our purpose to offer our gifts to enhance, deepen, and expand the spoken word. It is our purpose and our joy.

We have continued to offer a variety of places for people to serve. We have dedicated members of Adult Choirs, Youth Choir, Children's Music, and Adult Handbells.

Some of the highlights of the year have included:

- We launched the Arts for All Program. This afterschool program has 30 students registered and meets once a week to experience classes in Visual Arts, Creative Movement, and Handbells. We have partnered with AHSD to provide transportation from school to our church each week. Of the 30 students registered for the program, 80% attend regularly each week. Of the students participating, 50% are bused from their school to Alamo Heights UMC each week. We have a diverse population in which 25% are Asian/Pacific Islander, 25% are Hispanic, and 14% listed themselves as having a household income of \$25,000 or less.
- Our Holy Week experience involved the adult choirs, the youth choir, and brass
  - Good Friday is a highlight of the Holy Week experience as it is planned and led by our Youth Choir. The congregation finds great hope in seeing our youth serve in this way.
- Our annual Children's Music Camp in June brings in people from the community and the state. This year, we had one of the largest attendances since COVID. Percentage-wise, our outreach is about 75% of the people who do not attend Alamo Heights UMC.
- The Youth Choir took their mission trip to Nashville, TN. They served at Franklin UMC Giving Gardens, worked with Project Transformation, and sang at several nursing homes. A highlight of these trips is to watch these young people interact with the residents of the nursing homes. They sing with them and sit and listen to the stories of the people. It is beautiful to watch and to see the youth come back and share the stories they heard.
- This year, we brought in Brass for All Saints Sunday. It was a joyous celebration of the saints who have been a part of the community. This change was well received by the congregation at large.
- The Lessons and Carols Service with the Orchestra and all the choirs is a particular highlight for this ministry.
- We hired a Music Associate in July. Patrick Villalpando is currently overseeing the Children's Music program and Arts for All.
- We have an amazing staff in our Children's Music program and Arts for All. They are all master teachers, love working with children, and are supportive of the programs. We are grateful for Angela Leonhardt, Selena Davilla, Stacie, Brown, and Heather Kelly.

Participation in a musical ensemble provides a common space for people of varied ages, occupations, ethnicities, and theological views to join in a common purpose beyond themselves. Each Sunday, corporate worship offers the same opportunity for unity, encouragement, and community. It is our desire that as we practice our faith through worship and song, we grow as disciples of Jesus, making space for God's transformative work in our lives and having the courage to share our lives with others.

Respectfully submitted,

Nona Schwab  
Music and Worship Director



## **2023 Charge Conference Report Children's Ministries**

2023 has been a busy and exciting year for Children's Ministries. In January, we had our first Nerf and Nachos for our elementary aged kids. The kids had a blast and some of the parents joined in the fun as well. We also had a Kids Connect Bible Study for 2<sup>nd</sup>-5<sup>th</sup> graders for 6 weeks while parents attended one of the Wednesday night courses. In February we had a cupcake walk for kids during the chili cook-off. In March we had a Drive-In Movie showing "Cloudy With A Chance of Meatballs" and enjoyed spending time with families from our community. On Palm Sunday, the kids processed with palms at both services. After church, we had an egg hunt and activities for the kids. In May we had our 5<sup>th</sup> Grade Blessing to celebrate our 5<sup>th</sup> graders and prepare them for the transition to Youth Ministry. The end of May we also hosted our first Family Table – an opportunity for young families to be together and get to know one another. This first Family Table was held in conjunction with the opening of our newly renovated playground! With new playground equipment and artificial turf, our playground is safer and more beautiful than ever.

This year's Vacation Bible School was held June 5-9. Our theme was "Stellar" and we had so much fun decorating the building with a space theme. We hosted 175 children with 50 youth helpers and 75 adult volunteers. For our mission project, we collected money and school supplies for children in need in Freer, Texas. Our youth group delivered these supplies to them in July.

Over the summer we had so much fun with our Summer Sunday Fundays. Each week we have a different theme and tie it into a Bible story. Some of our themes were Pancakes in Pajamas, Boots and Bandanas, Under the Sea, and more. The kids LOVED it! We also squeezed in 3 Wacky Wednesdays!

August was busy with Back to School and our Blessing of the Backpacks. We were so happy to double our attendance numbers this year! We continue to welcome visiting families nearly every single week. This is definitely exciting and life-giving to our ministry.

In September, we held another Family Table on Grandparent's Day. We had so much fun with multi-generational families enjoying time together. We also distributed 3<sup>rd</sup> Grade Bibles on Sept. 24.

In October we held our annual Harvest Festival. This was, hands down, the largest one to date. We estimate that we had close to 900 guests at the festival. While this is exciting, it has also outgrown the scope of Children's Ministry. We look forward to this being a multi-ministry event next year.

In December we hosted our 3<sup>rd</sup> Festival de Navidad: A Night Bethlehem. This year's event was held in the CLC with approx. 500 guests attending. With the festival being in the CLC, we were able to create an immersive atmosphere with lighting and sound. The response was overwhelmingly positive with the experience allowing children and their families to imagine what life might have been in like in Bethlehem at the time of Jesus' birth.

As we approach the Christmas season, we look forward to the Children's Christmas Eve service. This is a special opportunity for our children to lead the service as well as the telling of the story of Jesus' birth.

We are excited to welcome 2024 and all that it has in store for our church.

## 2023 Charge Conference Report AHUMC Weekday School

The AHUMC Weekday School is a growing and thriving pre-school where young children are loved and appreciated. Our focus and mission is to teach these young children the Love of God and to encourage them to share that love with everyone they meet! We start each day with chapel in the Sanctuary learning about God and His love for each of us. We spend our time in chapel singing praise songs, hearing bible stories, practicing our monthly bible verse, and praying. We are richly blessed with Pastor Jason Adams joining us every Wednesday to lead our chapel time. The children and families regularly share how impactful his lessons and stories are for the children each Wednesday.

We love, care for, and educate children 6 weeks old to 5 years old. We are blessed to have 135 children enrolled at the school and from those children we serve 100 different families. We have roughly 85 children attend each day, Monday through Friday. There are 28 staff members at the Weekday School. We have a beautiful mixture of certified teachers with decades of teaching experience with young learners working alongside of early childhood care givers who are gifted in meeting the needs and developmental goals of young children. We extended our hours of care offered to our families this year until 5pm Monday through Friday. We now offer high quality and affordable childcare Monday through Friday from 7:30am until 5pm each day to all our families. The Weekday School also made improvements for our staff to include offering health benefits for our full-time employees as well as adding paid sick days for teachers and staff.

The Weekday School is excited to share that we created a new classroom elective within our church Library and adopted and incorporated the curriculum of Godly Play for our whole school. Kalenda Adams is our Godly Play teacher and she does a fabulous job of teaching our children about the word of God each week. The Weekday School also completed our major playground renovation. We added several new features and updated existing features to include outdoor musical instruments, outdoor easels and sensory tubs, extended track surfaces and new tricycles and cars for children to ride, as well as the addition of two swings. We expanded our sand area and added a new playhouse within the sandbox. We also relocated and expanded our Toddler Porch area to include more opportunities for our Toddlers and young learners to play, grow, and learn. Another area we have developed is parent involvement in the classrooms. We established a Parent Teacher Organization to help cultivate community, encourage communication between families, the school, and the church, and to help and support the teachers for special activities, events and celebrations. We invite parents to come on campus as special guest readers, center time helpers, small group leaders, and helping with class celebrations.

As we move into 2024, we are looking forward to continued growth and expanding our school to meet the needs of the community we serve. We are excited to continue our mission of sharing the love of God with the children and families we serve, while educating the children for their future.

Sarah Jernigan  
Director of Weekday School

December 12, 2023  
Youth Ministries for AHUMC  
Kathey Adams – Director of Youth Ministries

The year in review:

2023 brought great changes to the AHUMC youth ministries program.

- ☐ Changes in Confirmation
- ☐ Generational bridge building
- ☐ Mission and Discipleship Centered
- ☐ Inclusion and diversity within group

Changes in Confirmation – We are working with the pastors to develop a twelve week confirmation class that gives a solid foundation of Gospel knowledge and United Methodist Theology. We have transitioned from a six week Fall confirmation to a Spring confirmation with Confirmation Sunday on Pentecost Sunday.

Generational Bridge Building –

- ☐ The youth helped with multiple things in children's ministry programs, from seasonal festivals to Sunday School visitors and drive-in movie night.
- ☐ A couple of youth went and shared a presentation with our mature/aging adult class about the VBS mission trip to Freer.
- ☐ The youth have welcomed adult members of the church into Sunday School to share what they are knowledgeable and passionate about.

Mission and Discipleship

- ☐ Fifth Sunday Service – on the fifth Sunday months during church we did service projects. The youth joined Bible Study at a local nursing home and led in hymn sings and went and helped at Impacto Community Center.
- ☐ UMARMY – we took six people to our first UMARMY. We went to San Marcos and built wheelchair ramps, worked in the food pantry and did minor repairs around the church.
- ☐ VBS on the road – we took our VBS to Freer, TX. Our youth led in VBS for three evenings at Freer UMC. During the day they helped do projects at the Freer School and at the Holding Institute in Laredo.
- ☐ Discipleship – our Sunday School classes have focused on Spiritual Growth through study. With a focus on helping our youth become more Scripture literate.

Inclusion and Diversity

- ☐ We have welcomed several minority students into our group. This year about half of our active youth are minority students from single parent, low-income communities. We have sponsorships for these students to attend any or all youth events, retreats and camps.

*Kathey Adams*