



# ANNUAL REPORT 2023



**The Mountain**  
Retreat & Learning Center

We are an ecologically conscious retreat and learning center celebrating Unitarian Universalist principles. We welcome all of those who share our mission to create meaningful connections and make a difference in our world.

## A MESSAGE FROM ANNA

Dear Mountain Friends and Supporters,

As we reflect on the past year at The Mountain, we are thrilled to share the incredible progress and transformative moments that have defined our journey. One of our most significant achievements has been the successful launch of our Capital Campaign, which has already garnered contributions and pledges of \$1.8 million. We extend our deepest gratitude to those who have generously contributed, and we invite everyone to join us in shaping the future of The Mountain.

As part of the Campaign, we broke ground during Homecoming 2023 on two staff housing duplexes that are expected to be completed in the spring. However, the focus of our Capital Campaign extends beyond bricks and mortar; it embodies our commitment to fostering a vibrant community and preserving the natural beauty that defines us. With these funds, we aim to repair our dam to ensure the continued availability of our beloved lake and renovate guest spaces.

As we move forward into 2024, we invite you to join us on The Mountain – explore our programs, book a retreat, send your children to MountainCamp, or introduce another group or individual to the Mountain magic.

Our progress wouldn't have been possible without the dedication of our incredible staff and volunteers. Thank you for being an integral part of The Mountain community. Together, let us continue to build a future that reflects the values of unity, diversity, and the enduring beauty of our shared journey.

Warmest regards,

*Anna Martin*

Anna Martin

Chair of the Board of Trustees

The Mountain Retreat & Learning Center



## OUR CORE VALUES

Our core values, central to all philosophies and practices of The Mountain Retreat and Learning Center, Inc., are based on the Purposes and Principles of the Unitarian Universalist Association:

- The inherent worth and dignity of every individual
- Justice, equity, and compassion in human relations
- A free and responsible search for truth and meaning
- The right of conscience and the use of the democratic process
- The goal of world community with peace, liberty, and justice for all
- Acceptance of one another and encouragement to spiritual growth
- Respect for the interdependent web of all existence of which we are part
- Accountable to dismantle racism and other oppressions in ourselves and other institutions





## A MESSAGE FROM STEPH

2023 at The Mountain was filled with so many new ideas, projects, and people. The year went so fast that I'm in awe of how many things we all accomplished!

The greatest source of my excitement started with the launch of our very first Capital Campaign. You all had been working for years to make sure we did this right, and I just got to put the moving parts together to help make this a reality. The difference that this campaign will make for generations to come is immeasurable. The opportunity to honor our staff with quality housing plus take care of our aging facility will ensure that we are here for another 40 years.

We also continued to expand and make our youth programming a focus. It is our responsibility to grow and nurture our youth so that they can make a bigger impact on shaping this world. We are still rebuilding our youth base after the Covid years, but I have faith that our resilient and creative youth will grow and have a positive impact on our future.

This year welcomed many new groups and created local connections who have all fallen in love with The Mountain! It is a joy to meet and greet them and spend time sharing what The Mountain is about. Continuing to introduce new people to our mission will sustain us into the future.

Thank you for being involved, being focused on our mission, and being an active participant in everything we do here at The Mountain.

Warmest regards,

Steph Anderson  
Executive Director  
The Mountain Retreat & Learning Center



## OUR MISSION

The Mountain enriches lives, fosters an appreciation of the natural world, honors the interconnectedness of all things, and inspires people to build inclusive, meaningful, sustainable communities throughout their lives.

## OUR VISION

We are an exemplary retreat, camp & learning center that celebrates Unitarian Universalist principles, inspires people of all ages, transforms lives, and builds a more compassionate world.

## 2023-2024 BOARD OF TRUSTEES

Anna Martin	Board Chair
Rachel Kinback	Institutional Performance Team
Rev. Maggie Lovins	Leadership Development Team
Marleen Trader	Institutional Performance Team
Steven Reines	Leadership Development Team
Joy Irwin	Leadership Development Team
Lee Reading	Institutional Performance Team
Scott May	Planning and Finance Team
Jason Cobb	Planning and Finance Team
Victoria Stephens	Institutional Performance Team
Camille Cassingham	Leadership Development Team
Rev. Jan Taddeo	Recording Secretary
Steph Anderson	Executive Director/ Ex Officio Member



## 2023-2024 NOMINATING COMMITTEE

Charles Sterner	Nominating Committee Chair
Teresa Youngblood	Nominating Committee
Erin Powers	Nominating Committee
Wayne Morris	Nominating Committee
Robert E. Smith	Nominating Committee



## VOLUNTEERS

Our volunteers make significant contributions to our growth and success. Thanks to their talents and skills, we are able to provide impactful and engaging programs and maintain the integrity of our natural surroundings. In 2023, volunteers contributed 4057 hours, providing invaluable support and reflecting the true spirit of all who visit The Mountain and cherish our mission.



**“I HAVE VOLUNTEERED AT THE MOUNTAIN FOR OVER 40 YEARS. I GET TO WORK WITH STAFF AND OTHER VOLUNTEERS WHO BELIEVE IN SOMETHING WORTHWHILE – AND ARE DOING SOMETHING ABOUT IT. IN THE EVENINGS, WE GATHER AND LISTEN TO EACH OTHER AND TO THE MOUNTAIN; AND WHEN WE LISTEN CAREFULLY, WE LEARN SOMETHING PROFOUNDLY WORTHWHILE.”**



**— PHIL S.**



# MANY HANDS PEACE FARM

## WORKSHOPS AND EVENTS

Throughout the year, the Many Hands Peace Farm welcomed visitors of all ages to a variety of events and educational opportunities showcasing our regenerative farm. From forest-to-table dinners to workshops and camps - local residents, visitors to the area, and Mountain guests are all welcomed to participate, connect, learn, and have fun.

## NOURISHING THE CONNECTIONS WE MAKE

During the growing season, our farm provides garden fresh produce for our dining hall as well as offering our produce and products at weekly farmer's markets in the nearby towns of Highlands and Cashiers. This is a great opportunity to introduce the Farm to our neighbors and encourage their involvement in our programming and events.

## THE DIFFERENCE INDIVIDUALS CAN MAKE

We are always looking to build bridges and make connections with the local Highlands community and we're fortunate to call so many caring socially aware individuals our neighbors. This past year, local residents, Victoria Stephens, Delores Rosebrock, Lisa Daily, and MaryLou Harris all helped further these connections by planning a lovely Forest-to-Table-Dinner for about 20 local residents.

Guests enjoyed a beautifully curated dining experience as well as an informative farm tour. This event provided a special opportunity for all to learn about our programming, regenerative agriculture, and how The Mountain is a valuable resource for the Highlands Community, offering a variety of educational and recreational activities, as well as fresh eggs and garden produce.

We thank Victoria, Delores, Lisa, and MaryLou for making this mutually beneficial event such a great success.





# MOUNTAIN PROGRAMMING

## Mountain Designed Programs

Our programs are designed to connect participants with themselves, each other, and our greater world. These events are the core of The Mountain experience and are developed with the spirit of our surroundings and mission in mind. Events such as our annual Homecoming, Grateful Gathering, and Intergenerational Camp have been part of our programming for over 40 years and continue to draw participants to experience the inspirational and healing soul of this magical place.

## Unitarian Universalist Congregational Retreats and Programs

- Southeast UU Ministers Assn. (SEUUMA)
- Southeast Liberal Religious Educators Assn. (LREDA)
- Northwest UU Congregation
- UU Congregation of Asheville
- UU Congregation of Athens
- UU Congregation of Atlanta
- UU Congregation of Atlanta - Board Retreat
- UU Church of Birmingham
- UU Congregation of Columbia
- UU Congregation of Columbia - Volunteer Week
- UU Congregation of Gwinnett - Leadership Retreat
- UU Congregation of Knoxville
- UU Congregation of Spartanburg
- UU Congregation of Tennessee Valley
- UU Congregation of Transylvania County
- UU Congregation of Tuscaloosa
- UU Congregation of Emerson Choir
- UU Womenspirit

## Mountain Designed Programs

- Homecoming - Annual Gathering and Meeting
- Intergenerational Camp
- MountainCamps
- Thanksgiving - Grateful Gathering
- Youth CONferences - Spring/ Fall
- Easter Stewardship and Volunteer Weekend

## Mountain Hosted Events

- 5 Rhythms Dance Retreat
- Aaron Shearer Music Institute
- Atlanta Insight Meditation Sangha
- Commitment Ceremonies
- Episcopal Church of the Epiphany
- Gay Spirit Vision (GSV)
- John McCutcheon's Songwriting Camp
- Karmiel USA
- Memorial Services
- North Decatur Presbyterian Church
- North Decatur Presbyterian Church - Men's Retreat
- O'Conner Method - String Camp
- Our Song
- Performing Artists Group
- Qollasuyu
- Recovery Men's Retreat
- Sacred Lomi
- The Highlands Retreat
- Therapeutic Art
- Unity Men's Group
- Unity Weekend - Fall
- Zenergy Yoga and Wellness Retreat

“FOR THE LAST TWO YEARS, THE AARON SHEARER FOUNDATION HAS HELD ITS WEEK-LONG SUMMER INSTITUTE AT THE MOUNTAIN. OUR PROGRAM FOLLOWS A TRADITION ESTABLISHED BY RENOWNED MASTER TEACHER, AARON SHEARER (1919-2008) WHICH COMBINES CLASSICAL GUITAR STUDY WITH HIKING IN NATURE. WITH ITS BEAUTIFUL AND PEACEFUL FOREST SETTING AND ACCOMMODATING FACILITY AND STAFF, THE MOUNTAIN MEETS ALL OF OUR NEEDS PERFECTLY.”

— ALAN H.





# YOUTH PROGRAMMING

From tending to the farm, to hiking the forests and connecting on a deeper spiritual plane, we welcome our youth to The Mountain throughout the year for fun and life enriching experiences.

## MountainCamp

Summer at The Mountain is full of fun and adventure as the property comes alive with our UU youth exploring nature, connecting with new friends, and learning valuable skills to help navigate the world around them.

**2023 Attendance: 201**

## Youth CONs

Each spring and fall, youth from UU congregations across the Southeast and beyond gather at The Mountain for a weekend full of fun, fellowship, workshops and activities amid a warm and inviting environment.

**2023 Attendance: 211**

## Youth Farm Camp

Educating our youth about the importance of regenerative farming is essential in order to understand the connections of ecology, diet, and maintaining the balance of nature and mankind across the planet.

**2023 Attendance: 20**

“I LOVE THE NEW ADVENTURES EVERY DAY AND YOU GET TO LEARN A LOT OF NEW STUFF ABOUT UUISM, AND HOW TO WORK ON CLIMATE CHANGE. THERE ARE PEOPLE FROM AROUND THE WORLD AND IT’S SO NICE TO GET TO KNOW THEM.”  
— GRETA S.



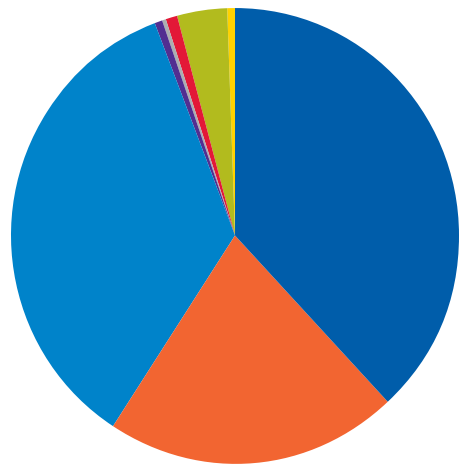


## DEVELOPMENT

These contributions support day-to-day operations, covering salaries, utilities, maintenance, and supplies in all departments. In 2023, contributions supporting The Mountain were **\$428,552**.

Because we try to keep registration fees low to encourage as much participation as possible, our goal is for registration revenue to provide about 75% of The Mountain's annual budget, with donations supplementing the other 25%. *See pie chart for categories of support.*

“WE GIVE TO THE ANNUAL FUND SO THE MOUNTAIN IS HERE TOMORROW.  
 WE GIVE TO THE CAPITAL CAMPAIGN SO THE MOUNTAIN THRIVES IN OUR LIFETIMES.  
 WE GIVE TO THE ENDOWMENT FUND SO THE MOUNTAIN IS HERE FOREVER.”  
 — ERIN T. AND BENJY F.



**DEVELOPMENT CATEGORIES**

■ Bequests	\$153,729
■ Grants	\$110,762
■ Individual Contributions	\$141,266
■ Congregation Contributions	\$1,503
■ Membership	\$1,945
■ Campership	\$3,298
■ In-Kind	\$14,463
■ Corporate	\$1,586

## CAPITAL CAMPAIGN

After establishing our first Capital Campaign committee in May 2021, we enthusiastically launched this generational investment in The Mountain that extends from 2023 to 2026. Throughout 2023, **\$1,811,000** was contributed and pledged toward our goal of \$3.2+ million.

These funds will be used to provide upgrades to guest and staff housing (photo above), meeting and office spaces, as well as the electrical systems, dining hall, and the tower. During Homecoming in May of 2023, we broke ground on our new staff housing (photo below) which will be ready for residents in mid-2024.





# GRANTS & ENDOWMENT FUND

## GRANTS

### SOUTHFACE GOOD USE GRANT

Southface Energy Institute is a nonprofit organization, engaged in promoting resource-efficient workplaces, homes, and communities throughout the Southeast.

**\$75,000 awarded** awarded and matched for a **total of \$150,000** to provide for new HVAC systems in the Commons and Rec Hall, mini-split systems for cabins, LED lighting and more.

### LAUREL GARDEN CLUB

This local organization aids in protecting and conserving of our natural resources and partners with other like-minded organizations.

**\$1495.36 award** was used for fruit trees and berry bushes in the food forest as well as native wildflower seeds to beautify The Mountain entrance.

### WILD AZALEA GARDEN CLUB

Focusing heavily on educational events, this group supports local projects in the service of horticulture and conservation.

**\$983.21 award** was used to support mushroom education projects by providing supplies for events.

### MOUNTAIN FINDINGS

A local resale store empowering change by using profits from sales to provide grants, scholarships, and donations for our local community.

**\$12,000 awarded** and matched for a total of **\$24,000** total used for greenhouse furnishings, lighting, irrigation, and supplies for workshops and growing mushrooms.

### RACIAL HEALING INITIATIVE

Part of the Retreat Center Collaboration, RHI provides training, technical assistance, and support to strengthen the capacity of retreat centers to advance racial healing and systemic change in their organizations.

**\$25,000 awarded** to strengthen the capacity of The Mountain to advance racial healing and systemic change.

## ENDOWMENTS

Greetings from your Endowment Board!

The purpose of The Mountain Endowment Fund is to support the long-term stability of The Mountain, as well as to enhance the Mountain's mission, programs, and activities. To achieve this, the Endowment Fund is invested with the Unitarian Universalist Common Endowment Fund, reflecting UU socially responsible investing goals.



**TOTAL ASSETS ON  
DECEMBER 31, 2023:  
\$708,030**

We are so grateful to report that the Endowment Fund grew by just over \$100,000 in 2023. Donors contributed \$52,015 to keep the fund healthy and the performance of the market contributed to the remainder of the fund's growth in 2023.

The health of the Mountain Endowment Fund is a true testament to all the people that hold The Mountain dear in their hearts, showing their commitment to The Mountain's future by making such a gift.

Erin Thompson  
President of The Mountain  
Endowment Board

## BEQUESTS

In 2023, bequests to The Mountain **totaled \$153,729**. We are so fortunate to have supporters who make planned-giving arrangements to The Mountain and/or The Mountain Endowment. These unexpected gifts make additional initiatives possible.

### 2023 - 2024 ENDOWMENT

#### FUND DIRECTORS:

Linda Sterner - President

Lem Arnold - Vice President

Rob Marcy - Treasurer

Erin Thompson - Secretary

Teresa Falzone

Bonnie Gramlich

Lois Lee

Joy Irwin - MRLC Trustee Liaison

Steph Anderson - Ex-Officio

Beverly Cree - Ex-Officio

**THE FUND GIFTED  
THE MOUNTAIN  
\$24,210 TO AID  
IN THE PURCHASE  
OF A 2022  
CHRYSLER PACIFICA  
6-PASSENGER VAN  
FOR PROGRAMMING  
TRANSPORTATION**



# OVERVIEW OF FINANCIAL POSITION

As the Board's Financial Advisor, I'm pleased to once again report that the Mountain's financial health and balance sheet remains strong. Net Assets increased \$1,469,960 to \$3,707,456, and we remain debt free

Total assets of \$4,524,912 are comprised primarily of Cash and Property & Equipment, well exceeding total liabilities of just \$110,089.

## Summary of Revenue and Expenses

In 2023, total revenue and support was \$2,712,272 (including \$1,269,183 from the Capital Campaign, \$957,582 Operating Revenue, and \$485,507 Contributed Revenue). Total expenses were \$1,262,138, resulting in \$1,450,134 net income. Again, this tremendous result was primarily fueled by generous donations to the Capital Campaign.

Operating Revenue of \$957,582 is the highest in more than 10 years, and a 21.7% increase over prior year.

Program revenue of \$957,231 was up \$207,639 from prior year. This was primarily from increases in UU Retreats and Youth Camps, as the impacts of Covid-19 continued to fade.

Contribution revenue of \$1,754,690 was up \$1,174,907 over prior year. This increase is due to the Capital Campaign. The support from our community continues to be strong, as seen in Capital Campaign pledges and donations, as well as in our development efforts. The Mountain was able to utilize these contributions to invest in much needed staff housing and other projects.

Total expenses of \$1,262,138 was \$29,884 below prior year.

## Overall Observations

The Mountain's 2023 financial results continue to remain strong. Smiles, music, and activity have fully returned to The Mountain, with Covid-19 in the rear-view mirror. The Capital Campaign is well-underway and is funding much needed staff housing and a costly repair to the dam. Net income has been positive for the 12th consecutive year and net assets have continued to grow. There is much to celebrate!



Scott May  
Financial Advisor

STATEMENT OF ACTIVITIES						
Dec. 31, 2023 & 2022	Unaudited 2023			Audited 2022		
	Without Donor Restrictions	With Donor Restrictions	Total	Without Donor Restrictions	With Donor Restrictions	Total
<b>Revenues and Support</b>						
Retreats and conferences	473,423		473,423	461,995		461,995
Youth programs	298,303		298,303	227,668		227,668
Mountain design programs	79,178		79,178	45,065		45,065
Personal retreat guests	28,683		28,683	-		-
Store revenue, net of expenses	2,768		2,768	1,439		1,439
Contributions	1,392,977	369,424	1,762,401	327,627	184,580	512,207
Contributed stock	-	32,243	32,243	-	47,604	47,604
Memberships	1,945		1,945	3,225		3,225
Rental income	-		-	-		-
Interest income	23,741		23,741	3,459		3,459
Present value discount of long-term pledge receivables	(28,191)		(28,191)			
Other	15,755		15,755	10,335		10,335
Gain (loss) on investments	7,560		7,560	(8,620)		(8,620)
Gifts in kind	14,463		14,463	55,463		55,463
Net assets released from restrictions	254,361	(254,361)	-	253,537	(253,537)	-
<b>Total Revenues and support</b>	<b>2,564,966</b>	<b>147,306</b>	<b>2,712,272</b>	<b>1,381,193</b>	<b>(21,353)</b>	<b>1,359,840</b>
<b>Expenses:</b>						
Program and services	938,167	-	938,167	1,005,139	-	1,005,139
Management and general	235,798	-	235,798	239,152	-	239,152
Fundraising	88,173	-	88,173	47,731	-	47,731
<b>Total Expenses</b>	<b>1,262,138</b>	<b>-</b>	<b>1,262,138</b>	<b>1,292,022</b>	<b>-</b>	<b>1,292,022</b>
<b>Change in Net Assets</b>	<b>1,302,828</b>	<b>147,306</b>	<b>1,450,134</b>	<b>89,171</b>	<b>(21,353)</b>	<b>67,818</b>
<b>Net assets, beginning of the year, as restated</b>	<b>1,636,981</b>	<b>545,032</b>	<b>2,182,013</b>	<b>1,547,810</b>	<b>566,385</b>	<b>2,114,195</b>
<b>Net assets, end of year, as restated</b>	<b>2,939,809</b>	<b>692,338</b>	<b>3,632,147</b>	<b>1,636,981</b>	<b>545,032</b>	<b>2,182,013</b>

## STATEMENT OF FINANCIAL POSITION

Dec. 31, 2022 & 2023

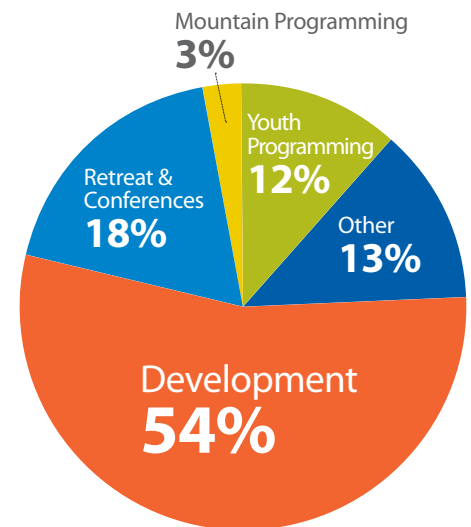
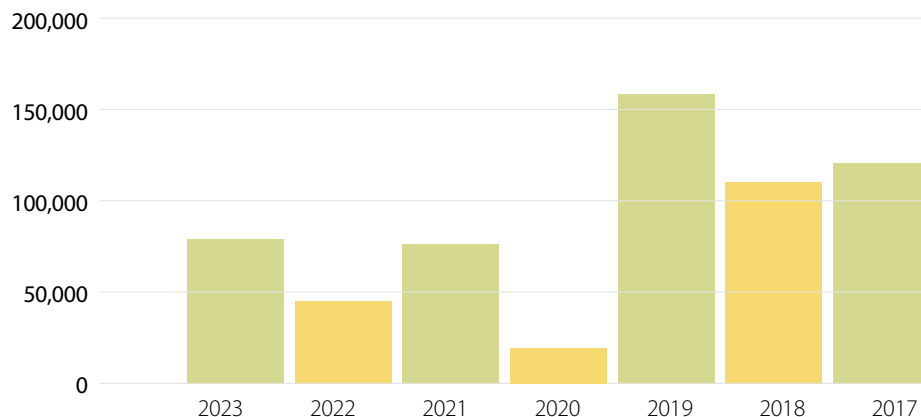
Assets		Unaudited 2023	Audited 2022
<b>Current Assets</b>			
Cash and cash equivalents		942,868	564,548
Promises to give, net		310,849	-
Accounts receivable		-	10,342
Grant receivable		74,500	30,619
Bequests receivables		-	13,500
Sales tax receivable		11,334	1,584
Inventory, net		9,914	5,416
Prepays		9,198	9,241
<b>Total Current Assets</b>		<b>1,358,663</b>	<b>635,250</b>
<b>Other Assets</b>			
Long-term promises to give		246,528	-
Certificates of deposit		297,711	395,105
Property and equipment, net		1,843,250	1,230,463
Operating lease right-of-use asset		-	703,352
<b>Total Other Assets</b>		<b>2,387,489</b>	<b>2,328,920</b>
<b>Total Assets</b>		<b>3,746,152</b>	<b>2,964,170</b>

## Liabilities and net assets

Current Liabilities			
Current portion of operating lease liability		-	1,336
Accounts payable		58,310	23,381
Accrued expenses		34,062	23,784
Deferred revenues		21,633	26,289
<b>Total current liabilities</b>		<b>114,005</b>	<b>74,790</b>

Operating lease liability, net of current portion		-	707,367
<b>Total liabilities</b>		<b>114,005</b>	<b>782,157</b>
<b>Net Assets</b>			
Without donor restrictions		2,939,809	1,636,981
With donor restrictions		692,338	545,032
<b>Total net assets</b>		<b>3,632,147</b>	<b>2,182,013</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>		<b>3,746,152</b>	<b>2,964,170</b>

## MOUNTAIN DESIGN PROGRAMMING REVENUE



“AFTER MY FIRST VISIT TO THE MOUNTAIN IN 1985, I REMAINED ENGAGED, AND I STILL FIND A GREAT DEAL OF JOY AND INSPIRATION IN THE PEOPLE, PROGRAMS, AND THE SPECIAL ENVIRONMENT THAT I FIND THERE. IT IS MY HOPE THAT MANY OTHER CHILDREN AND ADULTS WILL BE ABLE TO BENEFIT FROM THE MOUNTAIN.”

— MARTY B.

OUR HEARTS ARE FILLED WITH GRATITUDE BECAUSE YOU ARE PART OF OUR COMMUNITY.

WHETHER DONATING YOUR TIME OR CONTRIBUTING TO OUR FUNDING, YOUR SUPPORT MAKES A HUGE DIFFERENCE IN WHAT THE MOUNTAIN IS AND WHAT IT CAN BECOME. TOGETHER, WE CAN CONTINUE TO GROW THIS SPECIAL PLACE AND MAKE A POSITIVE DIFFERENCE IN OUR WORLD.



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**"I HAVE FOND MEMORIES OF THE MOUNTAIN: EARLY MORNINGS WITH THE SUNRISE, LATE NIGHTS, BRAVING THE COLD WINDS OF THE TOWER TO STARGAZE WITH FRIENDS, WINDING MY WAY DOWN FOREST PATHS, ADMIRING THE BEAUTY OF THE GNARLED DWARF OAKS. I VOLUNTEER IN AN EFFORT TO ENSURE THESE EXTRAORDINARY EXPERIENCES FOR FUTURE MOUNTAIN-GOERS."**

— ELIZA M.