

# 2022 ANNUAL REPORT



*St. Simon's on the Sound*

Episcopal Church • Fort Walton Beach, Florida

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## Treasurer's Report

Submitted by Steve Brown  
Treasurer

The primary account for the parish is the general operating fund...we started 2022 with an operational budget of \$596,460. Mid-year we increased the budget due to modest staff raises to help offset inflation. Our final budget for the year was set at \$601,080.

- Operational revenues (Pledge/Plate/Other) ended the year at \$614,706...the increase was due to additional revenues from Plate offerings.
- Operational expenses ended the year slightly below budgeted projections...\$598,082.
- We ended the year with a modest surplus of \$16,624.

St. Simon's also maintains a Major Repairs account to address capital repairs not budgeted for under general maintenance and repairs. This account is supplemented from a budget line for \$1,000/month plus any gifts and donations from parishioners. The account started the year with a balance of \$62,283 and ended the year with a balance of \$39,424. We had capital expenditures of \$50,772.

### Major Account Balances

■ General Operating Fund	\$174,867
■ Major Repairs/Columbarium	\$39,424
■ Money Market	\$156,156
■ Endowment	\$113,322

2023 Operational Budget is set at \$622,000.

## **Junior Warden's Report**

Submitted by Matt Smith

Junior Warden

I would like to thank the staff (especially James and John, the Sexton Team), my fellow vestry members, and the parishioners for their unwavering support and sage counsel the past year. We are blessed with a magnificent venue to serve God and our community, but as always it is the people who make a difference. Thank you for your continued support as we collectively steward the property through 2023.

Our property management approach in 2022 was largely reactive due to the nature of our operating budget. We replaced two failed HVAC systems and one air handler. The church has 20 independent HVAC systems of varying ages and well-being. We will continue to service, repair, and, when required, replace units to keep the aggregated system operational. Other big ticket repair items included fire suppression system, rodent infestation, outdoor chapel, and the parking lot.

The primary property concern remains our failing roof. We received three estimates to replace the roof system at a cost of \$600,000 to \$700,000. We will address this with the parish in more detail at the annual meeting. There are other long-term maintenance issues that require attention, such as the parking lot and exterior repairs, but we will defer those until we collectively address the roof issue.

With challenges come opportunities. I look forward to working with each of you to figure out how to best maintain and support our Church in the long term. God Bless.

## **Rector's Report – Annual Meeting 2023**

At our last Annual Meeting in October of 2021, we approved a bylaw change to move the meeting to January of each year, leaving October more available for stewardship purposes. So...it's been a while. The meeting this year will be different, hopefully you will all feel transparency and a willingness to engage each of you as we discuss some hurdles St. Simon's must address in the coming months and years.

From December 2022 through September 2023, I am celebrating (mostly) some milestones. December 14<sup>th</sup> was the 20-year anniversary of my ordination to the priesthood in Greenville, MS. I remember that day so well, and in reflecting on the 20 years I fondly recalled so many amazing people, so many challenging times, so many delightful gatherings and the awesome privilege it has been and continues to be to serve God and all of you in this unpredictable and humbling and rewarding vocation. This summer I will turn 65 – but fear not as retirement is not on my radar screen. Then in September Jennifer and I have special plans to celebrate our 40<sup>th</sup> wedding anniversary – the most important of all the milestones. How blessed and fortunate I am to have married way above myself (out kicked my coverage as they say), she continues to be my rock and my love.

When reviewing my last Rector's report, it was full of hopes and dreams of St. Simon's, in particular that we would more fully rebound from the impact of Covid 19. We have done so in many lot ways, but I still hope and pray for our regular worship attendance to return to pre-covid numbers, because I miss so much those who are no longer attending regularly. So, my prayers continue, and I encourage all of you – come and worship in community, it is perhaps our most important way of connecting with one another and with God.

No church can function well without a group of faithful volunteers, and we have many. I dare not name names in fear of missing someone, but you know who you are. I hope the various ways you offer your time and talent to God through our church brings you joy and a sense of using the gifts God has given you. But of course, we always need more of you! More ushers and greeters, more altar and flower guild members, more prayer warriors and those who assist at worship, more people fired up to go out into the community offering God's grace and love to those in need. Please think and pray of ways you believe God is calling you to contribute.

This past year we also celebrated the ministries of John Leatherwood (40 years as Choir Master) and Lynda Cast (38 years as organist). We all know how amazing our music ministry is, and John and Lynda are the reason for that. What a blessing they are to us and to our community.

Your vestry carries a large load and for each of them I am thankful. We will miss Carter Caywood, Senior Warden, and his family as they have relocated to the Orlando area. Thanks also to Christin Cothran and Georgine Hillgenberg for their three years of wonderful service.

As always, I am grateful for our staff, they always work very hard on your behalf. I hope you will take time to reach out to each of them and offer thanks. They are all a blessing.

Again, let me say what an honor and privilege it is to walk with Jesus and all of you of St. Simon's. I am a blessed man, of that, I am sure. May God shine a holy light on our church, our people, our community, and the work God is calling us to do. May God direct our ways, assist our discerning hearts, and prepare us for his kingdom to continue to come near. The world needs us, Jesus people, so let us be what God needs us to be. Yay Jesus!

**Pastoral Acts since the last Annual Meeting:**

Baptisms: 4	Confirmations/Receptions/Reaffirmations: 9
Marriages: 1	Burials: 14

**DEACON'S REPORT**  
**Submitted The Rev. Clelia P. Garrity, LCSW**  
**Associate for Community Engagement and Pastoral Care**

In 2022, Deacon Clelia was involved in activities specific to both St. Simon's on the Sound and to the Diocese of the Central Gulf Coast. The scope of these activities is listed below:

**ST. SIMON'S ON THE SOUND**

- Participation in all church services;
- Preaching on a regular basis;
- Pastoral care visits to include office, home, and hospital visits, funerals, etc.;
- Coordination of the Pastoral Care Team (to include an expanded pastoral care program that targets both church membership and Ft. Walton Beach Community institutions such as the Meridian and the Belvedere Rehabilitation Center;
- Development and coordination of the Brown Bag and Blessing Bag ministries. The purpose of these ministries is to provide food for the Sharing and Caring Food Pantry and hygiene supplies and socks for homeless school children in Okaloosa County;
- Coordination of and participation in community engagement projects such as supporting the needs of both students and faculty at Elliott Point School and participation in the One Hopeful Place cold night ministry;
- Participation in Community-based organizations: Volunteer Chaplain.

**THE EPISCOPAL DIOCESE OF THE CENTRAL GULF COAST**

- Appointed by the Bishop to membership on the Commission on Ministry
- Appointed by the Bishop to the Commission on World Engagement & Mission
- Appointed by the bishop as Missioner for Global Refuge Ministries

**OTHER**

- Coordinator Baluba Health Care Project (Zambia, Africa)

D. Min. Program, General Theological Seminary – second year compel

## Christian Education for Children and Youth 2022

Catherine Watson, M.S. (C&I), Director of Christian Education for Children and Youth

**The goal of Christian Education at St. Simon's on the Sound** is to bring a complex and comprehensive vision of programming that engages children in three distinct age groups in meaningful, safe activities that will enhance their spiritual growth. In safeguarding the children, we will maintain a two deep level of adult supervision over the children no matter what age group they fall in (0 – 3 years/4 - 11 years/12 -18 years).

**Children's Chapel** was phased in October 2021 from an absence in programming due to COVID-19 restrictions. Since traditional Sunday School had not been phased in at that time, many of the teaching elements that are traditionally included in a comprehensive children's Sunday School program were, and continue to be, incorporated into Children's Chapel. This, in turn, has helped with the wholesomeness of our Family Formation. Children's Chapel includes music, stories, dramatics, *Godly Play*, scripture, sermons, and art activities. Most importantly, it also offers an Episcopal Faith structure while also delivering scripture-based sermons that are rewarding for children of all ages. Special emphasis on five types of prayer have also been a focal aspect of Children's Chapel; these are prayers of *Adoration, Confession, Thanksgiving, Intercession, and Petition*. Special thanks are offered to our adult and EYC parishioners who have assisted Catherine Watson with the successful delivery of this program: Michelle and David De Vries, Christina MacDonald, Carla Hunt, Katerina and Tatianna McCrea, Chi Medina, and Jennifer Lee; and also, to our Jr. EYC Helpers: Vanessa and Dylan De Vries, Warren Smith, and Wesley Caywood. If you have an interest in assisting in the Children's Chapel, we would love to include you.

**Sunday School** was phased in February of 2022 after a long pause while the community adjusted to the COVID-19 restrictions. "Sunday School is for Everyone! Come—fill your hearts with the love of Jesus and the joy of life!" was, and is, our guiding motto. Our Sunday School programming includes the following groups: "Little Lights", "Joyful Noise", "Episcopal 101", "Faith Matters", and "Meeting God in the Gospels". Special thanks are offered to our Sunday School Leaders and Staff who have helped in the successful delivery of these programs: Carla Hunt, Mo Byrd, Carter Caywood, Ellen Sheppard, Catherine Watson, Father David Knight, Deacon



Clelia Garrity, Michelle Anchors, and Jennifer Lee (listed in order of program delivery).

**Looking Forward with Sunday School.** We plan to integrate training of dedicated Sunday School volunteers and staff in “Godly Play”. This program is an imaginative approach to religious education geared for younger children. As many of our parish families with older children have relocated due to military or career moves, we need to be able to offer faith formation for children from ages 3 and up who are in or have moved into our community. Godly Play fits perfectly into our Little Lights and Joyful Noise Sunday School groups who participate in a wheel of playful learning that includes drama, art, and music. With *Godly Play*, “wondering together” is an explorative aspect of the scripture-based narratives that are delivered in both a playful and Godly manner. We have budgeted for training and any curricular based products needed in the successful delivery of this incredible program.

**The Nursery** will continue to administer to the needs of the newborn through three years of age with guidance from the parents/guardians. We established a record keeping system to help us develop the right kind of program for the participants in our Church community. Staffing will continue to be a combination of paid and volunteer individuals with appropriate training and supervision to ensure the safety of the participants. Special thanks are offered to Pat Fullen, Kate Smith, Katerina McCrea and Tatianna McCrea, Kristin Shinnick for the work they have done in the Nursery. Going forward, we are looking for additional helpers to rotate into the Nursery to assist in this rewarding work.

**Special Interest Programming** was designed and implemented to engage children, youth, and adults in wholesome Christian Community and to enhance their overall knowledge and love of Jesus Christ and the written word. These special interest programs were phased in beginning October 2021. Since that date, St. Simon’s on the Sound Christian Education has been integral in the delivery of 28 special interest programs that brought us together in Christ. Special thanks are offered to the tireless and devoted parishioners and staff who successfully delivered these programs: Kristen Shinnick, Mary and Bob Hauge, Michelle and David De Vries, Carla Hunt, Phyllis and Michael Cheney, Cyndi Gillespie, Ellen Sheppard and Friends, Ron Poole, Carter Caywood, Kelley Fuller, Sheila Campbell, Matthew and Kristen Owens, Cece Allen, Mo Byrd, Jennifer Lee, Debbie Oliver, Chris Westfall, John and James Wyatt, Barbara Bethea, Val Fuqua, Netta Holley, Liz McCartney, Liz LaFollette, Michelle Anchors, Chi Medina, Catherine and Joe Watson, Jennifer and Father David Knight and Deacon Clelia Garrity, as well as, our EYC and Jr. EYC. One of our focal efforts moving forward is to gather intergenerationally in a “heart work”/service-oriented outreach of programming to reach beyond the doors of St. Simon’s on the Sound and

into our surrounding communities at large. All volunteers are welcomed in this incredibly rewarding work.

**Episcopal Youth Community (EYC) /Jr. EYC** has been re-established this past year through special interest programming to engage the children in 6<sup>th</sup> through 12<sup>th</sup> grades (EYC) and 3<sup>rd</sup>- 5<sup>th</sup> grades (Jr. EYC). The first phase of the program included participants in volunteer leadership roles, helping with Children's Chapel and all special programming. Though the few (mostly Seniors) have not been able to establish a time, that is going to work with their schedules, for us to meet on a regular basis as an EYC, we have continued to develop an interest-based set of activities that allows them to enhance their Christian Education and develop a personal belief vision during periodic programming. We have also reached out to our neighboring Episcopal Youth Community at St. Jude's for collaborative projects to enhance the community. Special thanks are offered to: Lauren Franklin (St. Jude's), Cece Allen, Kristin Shinnick, Mo Byrd, Michelle and David De Vries, Mary Hauge, Cyndi Gillespie, Catherine Watson, and Jennifer and Father David Knight. All volunteers are welcomed in this rewarding work.

**VBS/VBS Outreach.** During the summer of 2022, we re-established VBS for our St. Simon's on the Sound community with a pilot program: *Spark Studio*. This five day program included scripture based learning through music and dance, drama, video presentations, bible stories, mission work, arts and crafts, special snacks that correlated with the scripture verse of the day, games and kinesthetic activities, prayer and fellowship. This work was collaborative with each station incorporated in a "Great Room" (aka Parish Hall) for a seamless, safe, and successful delivery of programming. Extending beyond the physical VBS, St. Simon's on the Sound also delivered care packets with full lessons, activity supplies and tie-dyed tee-shirts to those who were not able to attend in person. Our VBS Extension Program had an outreach as far as Germany to the East and Hawaii to the West. Thank you to the many volunteers and staff who assisted Catherine Watson with this vital program: Kristin Shinnick, Mary and Bob Hauge, Matthew and Kristen Owens, Phyllis and Michael Cheney, Carla Hunt, Sheila Campbell, Kelly Fuller, Ellen Sheppard, Ron Poole, Pat Fullen, Katerina McCrea, Cece Allen, and Jennifer and Father David Knight.

**Christian Education Facilities Updated.** During the winter of 2022, Kristin Shinnick and Catherine Watson were able to sort, organize and update the décor of 4 of the 5 areas that service Christian Education for Children and Youth upstairs. Additionally, we enlisted the help of James and John Wyatt with the removal of heavy furniture which had been stored in those rooms; and Joe Watson for putting together the lift top desks for the "Blue Heron Art Café" Room. Special thanks are offered to

all who helped in this vital project geared to help St. Simon's on the Sound in the delivery of Sunday School and future VBS and special interest programming. Looking forward—we plan to develop the “Godly Play” room this winter to prepare for integration of the *Godly Play* program on a regular basis.

Blessings to each of you for your help and in bringing the love of Christ to children.

Catherine Watson

**Flower Guild Annual Report  
Submitted by Chris Westphal**

Our St Simon's on the Sound, Flower Guild, has been surely blessed by the offerings of this church. Your support at our most recent Poinsettia Fund raiser will make the coming weeks possible to keep our church in its customed form of beauty to glorify our Lord. We have 4 teams that work so well together, yet we always have the need and want more people to help with our task to make our altar shine with beauty. We remain a group that is not supported by the budget and hope that when you wish to honor a special someone in the coming year you will consider doing this by way of a flower dedication.

**Altar Guild Report  
submitted by  
Chris Westphal & Kelley Fuller**

Chris Westphal and Kelley Fuller continue to lead the Altar Guild teams, with Chris also managing special services and events.

The Altar Guild does a beautiful, mostly undetected, job of making sure the Altar is prepared for services by working alongside our clergy to prepare His table. We have lost some members this year and have, thankfully, gained some new ones. We still have 2 teams preparing the altar for Sunday services, other special services, funerals, and an occasional wedding. And, like many of our church ministries, we could use some more dedicated members to fulfill this quiet, thoughtful ministry undertaken in the name of Christ.

We are so thankful for your giving because it allows us to keep our communion table in great supply.

**Administrative Report**  
**submitted by**  
**Cynthia L Gillespie**  
**Finance & Office Manager**

2022 marked my first full year in the position of Finance/Office Manager. It has been a wonderful year. I truly enjoyed participating in all the special events such as the Pentecost Service and Luncheon with Bishop Russell, Palm Sunday, The Blessing of the Animals and Blue Christmas, just to name a few.

It has also been a privilege to work with Gloria Battle, Deacon Clelia, and Kristin Shinnick on St. Simon's Cold Nights at One Hopeful Place.

It has genuinely been an honor to work with Deacon Clelia in resuming St. Simon's Community Engagement Program, as she has successfully coordinated the Brown Bag and Blessing Bag ministries.

I am impressed with the many volunteer hours that have been put forth to support Elliot Point School with donation of snacks and school supplies, the Hoodie Drive, the teacher appreciation breakfast, and an archery team scholarship that sent one team member to the National finals, all done under the expert leadership of Jean Hood.

The stewardship of the Columbarium brings responsibility, as such, St. Simons has a Fiduciary Duty of Care to maintain it at the highest standards in perpetuity. During 2022, Chris Westphal, John and James Wyatt and I embarked on a multi-phase restoration project involving the record keeping and labeling in the Columbarium.

- **Phase One:** Reviewing & Comparing both copies of the Columbarium Directories, as well as the electronic directory for consistency and accuracy. This was achieved by a complete walk-through of the Columbarium, matching Niche Tags to the directories and by using the Death Records Green Book. In the process all Birth and Death dates were added to the Directories.
- **Phase Two:** All the brass name tags have a special coating on them to prevent tarnishing. Sometime over the years, a brass polish was used on some of the tags. This removed that protective coating and the tags turned black, making them almost impossible to identify. Phase Two was to replace the name tags

on the Memorial Plaque on the east wall of the Columbarium. Total cost was \$432.43 covered by Columbarium funds.

- **Phase Three:** Prior to 2019 the urns in the Columbarium were of a silver material. Our custodian would etch the name of the individual on the urn before it was put into the niche. The idea is that if there was a catastrophic event, such as major flooding and the niches opened, the urns would be identifiable. In 2019 the urns were changed to a brown metal material, making the etching impossible. While working with Armento (our Columbarium vendor) we were informed that there are Urn Tag Covers that have the name and dates engraved on them. We went through the directories and listed all the internments from 2019 through 2021. We then checked the niches for the type of urn and ordered name tags for all that were of the new material. We ordered and installed 12 covers. The total cost was \$501.12 covered by Columbarium funds. During 2022 and moving forward all Urn Tags are ordered along with the Panel Name Plate upon interment.
- **Phase Four:** Replacing the black name tags on the panels. On inspection we found that there were 62 name tags that are almost unidentifiable on the panels. The plan was to replace 12 at a time. This phase was completed in November. Total cost to completion \$2,085.

It has been a busy and fulfilling year and I am looking forward to 2023, working on all these meaningful projects, alongside my friends and family at St. Simon's.

## Vestry Nominees 2023

**Matt Smith** - Matt was selected by the vestry to serve the first year of a 3-year term vacated when the elected representative moved out of state. Matt is our Junior Warden and now needs to be selected by the congregation to serve the final 2 years.

**Fred Happel** - Fred joined St. Simon's a little over a year ago upon moving to Ft. Walton Beach from Tallahassee where he was very active at St. John's Episcopal Church. Fred will be fulfilling the final 2 years of Dawn Miller's term; Dawn was a new member of the vestry in 2022 but they have relocated to Central Florida.

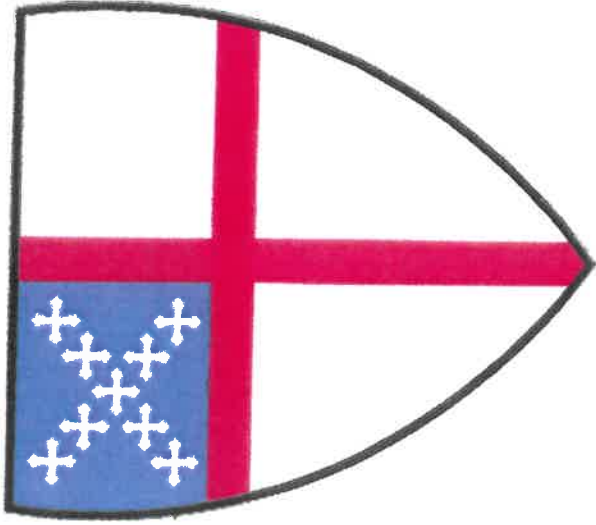
**Bob Blake** - Bob has served St. Simon's in many ways over the years. He has previously served two terms on the vestry and brings a level of experience and expertise which will serve our vestry and church well.

**Mo Byrd** - You will all recognize Mo's smiling face. She has been part of St. Simon's since 2008 and now offers her considerable gifts to serve on our vestry at this important time. Mo is a teacher in the Okaloosa School District and has served our church in a variety of volunteer roles for years.

**Trace Morris** - Trace has been part of St. Simon's for a couple of years, joining our parish via baptism and then confirmation. He has jumped into life at St. Simon's with both feet and you may have encountered his sunny

disposition when he serves as an usher. His background will enhance our property team and his fresh perspective will be an asset to the vestry.





# 2023 ANNUAL MEETING



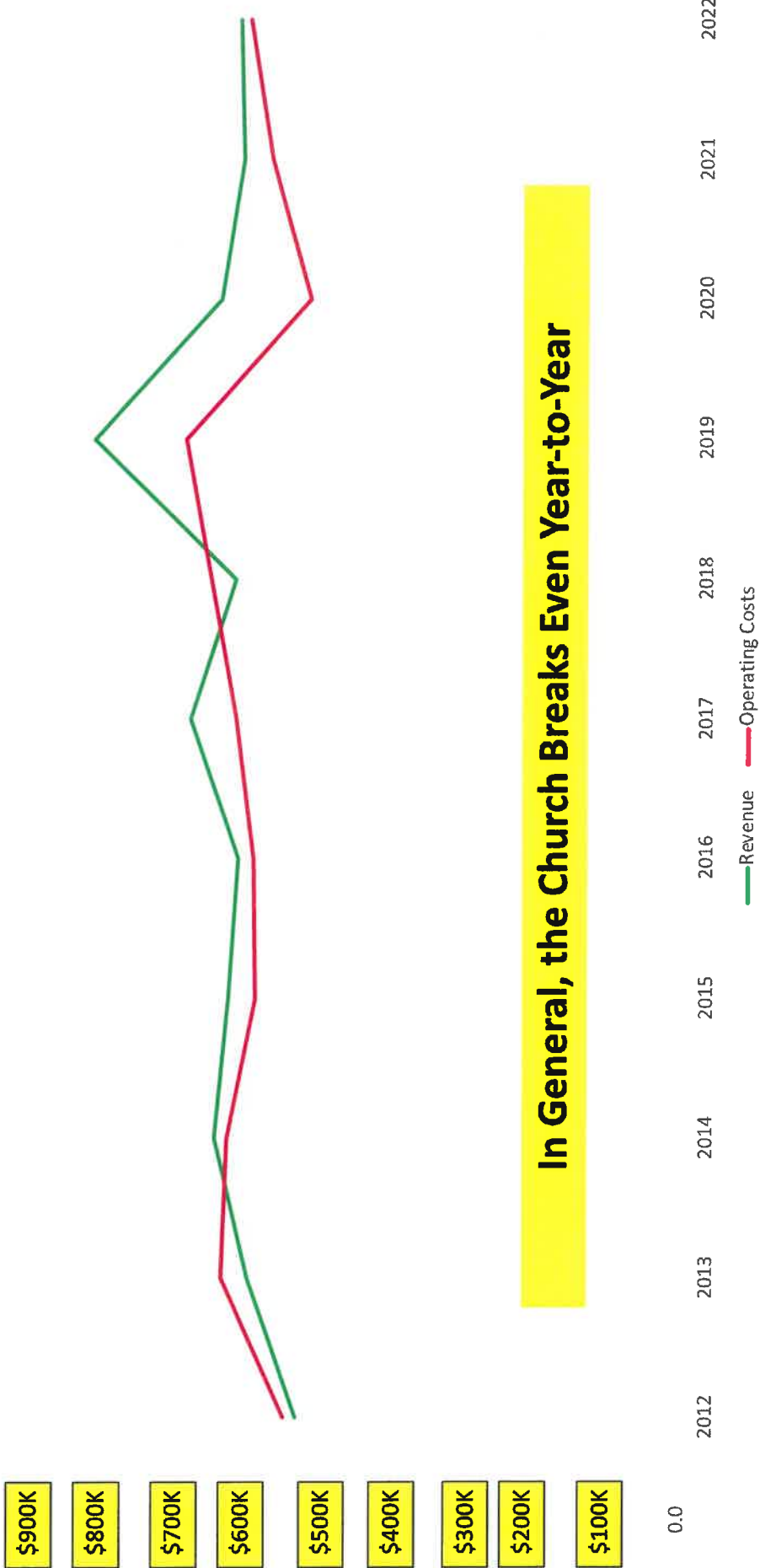
*St. Simon's on The Sound*

Episcopal Church \* Fort Walton Beach, Florida

# Agenda

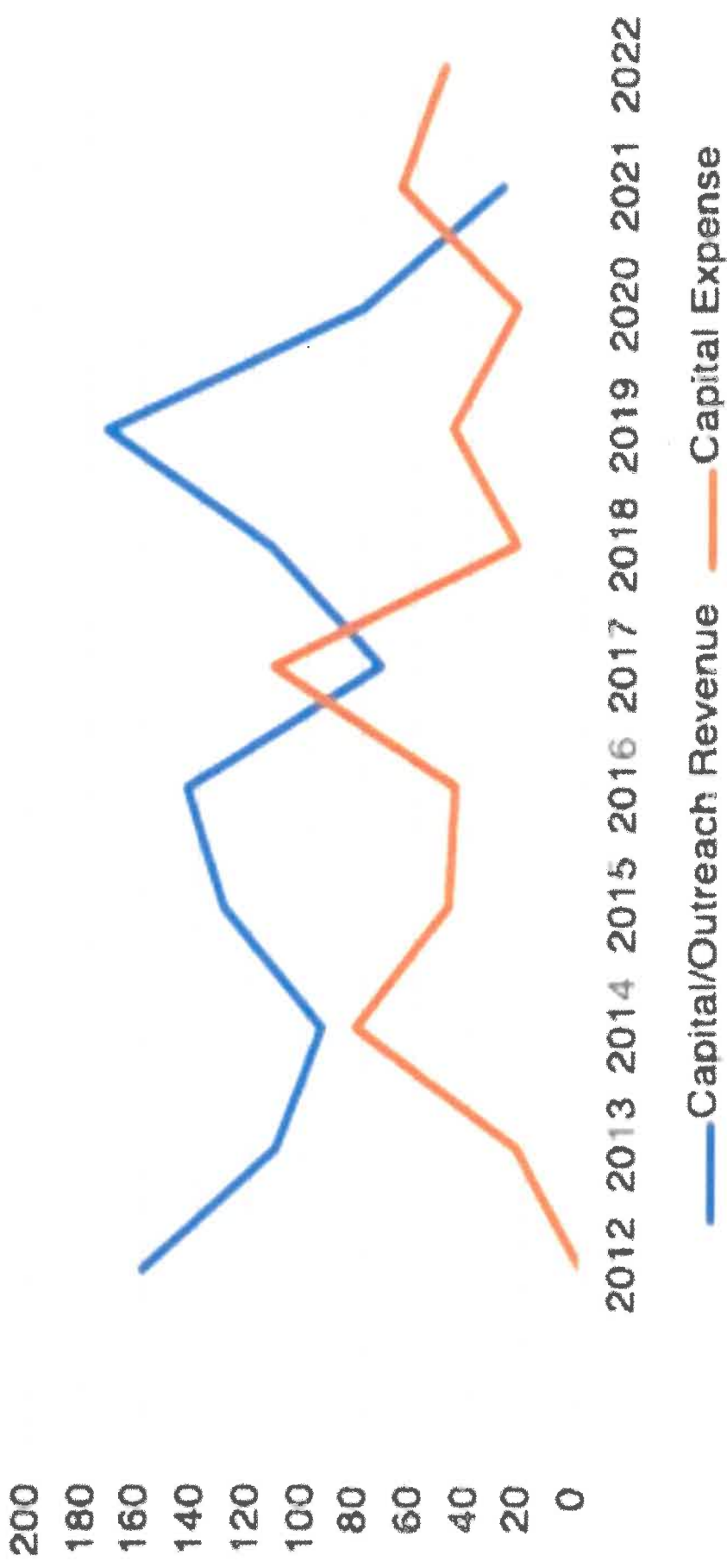
- Fiscal State of the Church
- Physical State of the Property
- Roof Replacement Estimates
- Potential Funding Strategy
- Strategic Discussion
- Request for Feedback to Inform Way Ahead

# Revenue vs Operating Costs

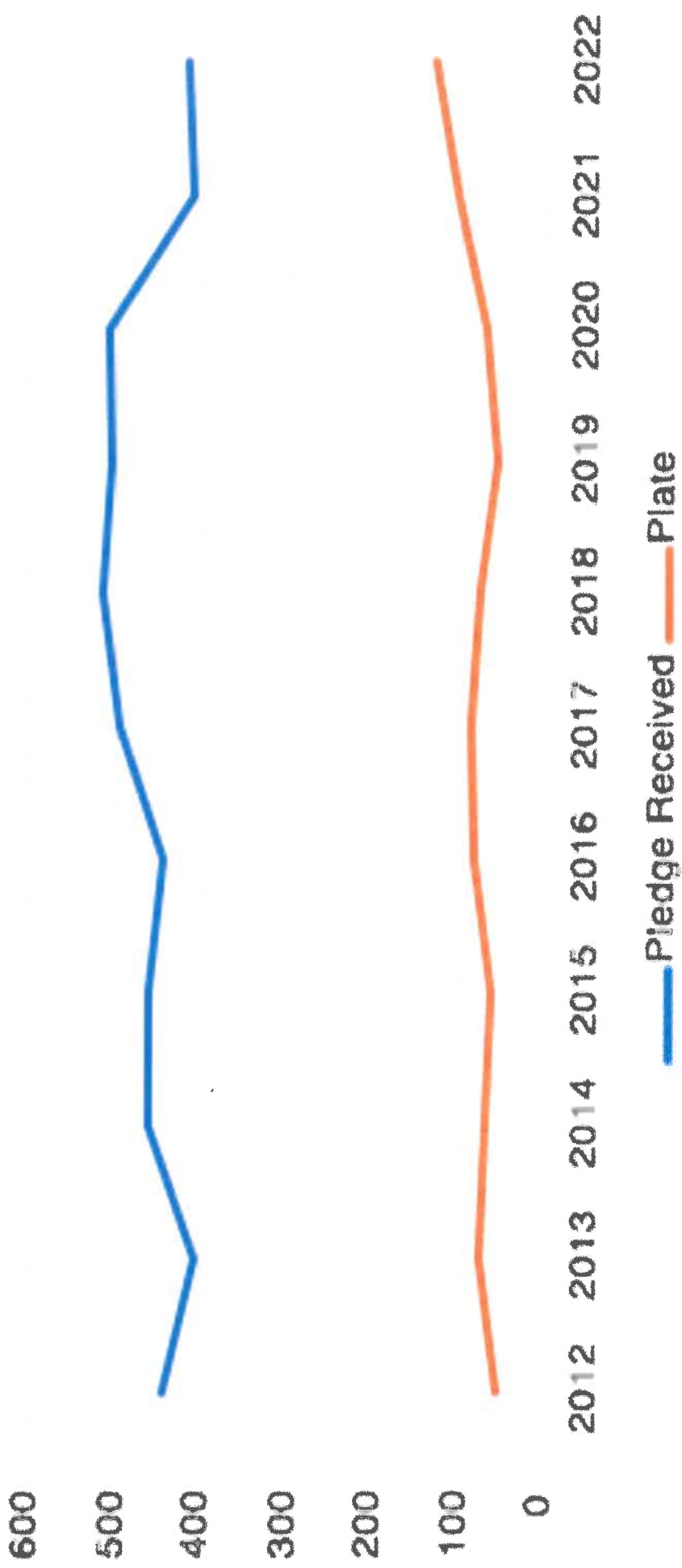


# Capital Summary

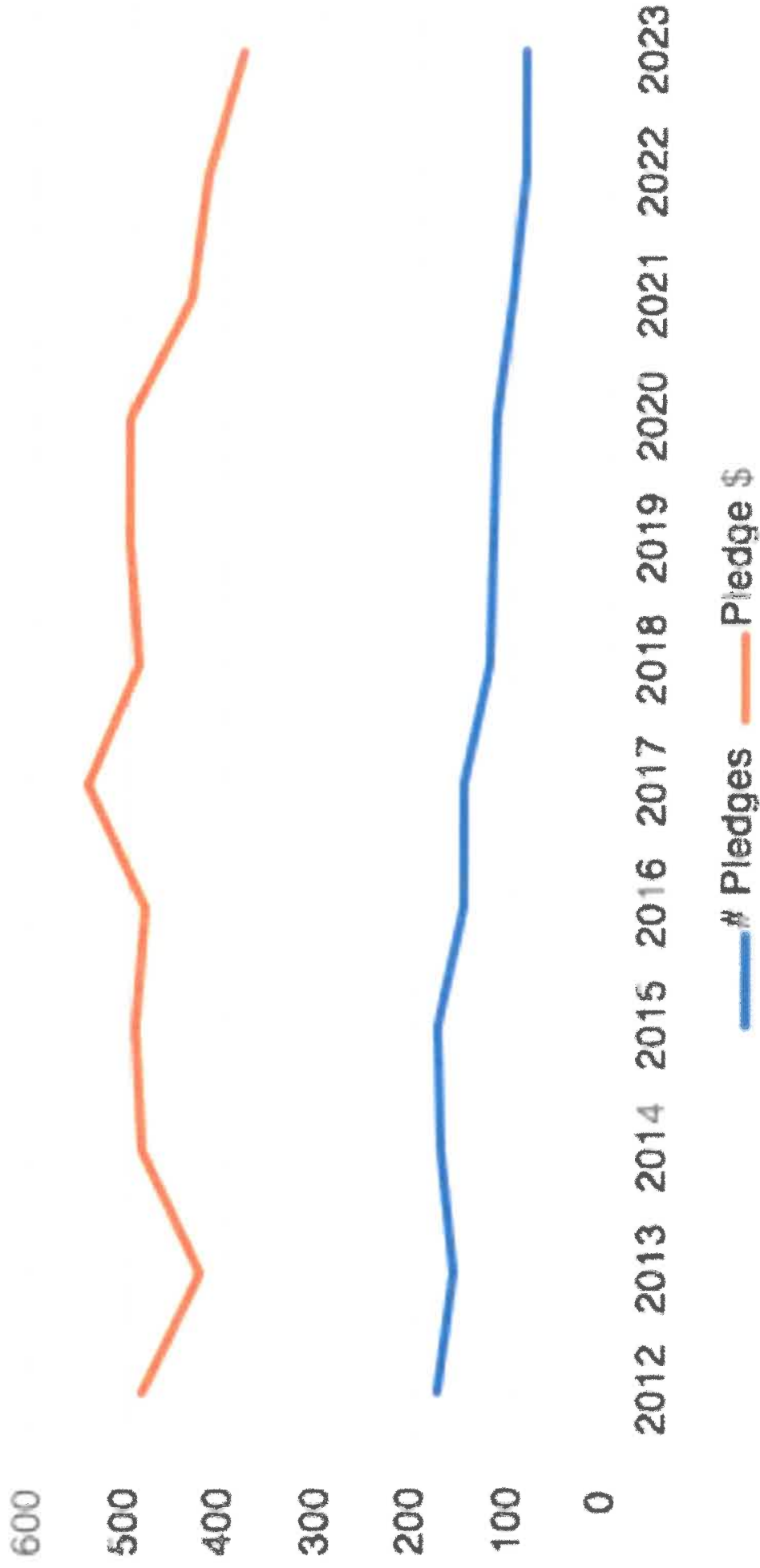
## Capital/Outreach Revenues vs Capital Expenses



# Stewardship Summary



# Pledge Trend



# Physical State of the Property

- ~35K sq ft Aging Structure
- 65 rooms
- HVAC System Comprised of 20 Independent Units
- Failing Roof
- Parking Lot
- Insufficient Seawall
- Interior and Exterior Repairs

# Roof Replacement

## Replacement Estimates

- Destin Roofing: \$528K
- K & L Solution Group: \$550K
- Cooper Roofing of FL: \$646K

## Potential Funding Strategies

- Capital Drive
- Loan
- Savings
- Independently not feasible
- Combined approach may be feasible



# Hypothetical Annual Loan Payment

	6%	7%	8%	9%
\$250K	\$25K	\$27K	\$29K	\$30K
\$350K	\$35K	\$38K	\$40K	\$43K
\$450K	\$46K	\$49K	\$52K	\$55K
\$550K	\$56K	\$59K	\$63K	\$67K
\$650K	\$66K	\$70K	\$75K	\$79K
\$750K	\$76K	\$81K	\$86K	\$91K

2022 Revenue: \$596K

2022 Expenses: \$601K

# Strategic Discussion

- Current Model is not Sustainable
  - Outsized and Aging Infrastructure
  - Operating Costs Rising
  - Revenue Flat or Decreasing
  - Membership Declining
- Funding Roof Replacement will place the Church in Financial Risk
- Should we consider relocating?

# Feedback

- Please take the survey found at:

<https://www.surveymonkey.com/r/2MGD5BQ>

We will e-mail the link.

Or e-mail feedback and comments to [smithmad@live.com](mailto:smithmad@live.com).