



2023 ANNUAL REPORT



St. Simon's on the Sound
Episcopal Church • Fort Walton Beach, Florida

TABLE OF CONTENTS

| | |
|---------------------------------------|-----------|
| Vestry Nominees | 2 |
| Rector's Report | 4 |
| Deacon's Report | 6 |
| Senior Warden's Report | 7 |
| Junior Warden's Report | 8 |
| Treasurer's Report | 9 |
| Administration Report | 10 |
| Flower Guild & Altar Guild | 12 |

2024 Vestry Nominees

All nominees will serve 3-year terms.

Kelley Fuller

I was born in SC and raised in the Baptist church. I met my husband, Van, in my freshman year of college and we were married the next year. I finished school at LSU during our first Air Force assignment to England AFB, La. The next thirty years we worshipped primarily in Air Force chapels though-out Europe and the US. We were confirmed in the Episcopal Church in 2011 at St. Augustine's in Navarre and found our church home here at St. Simon's in 2015.

I've served in many ministries at St. Simon's to include Arts and Crafts Fair, ECW, Cursillo Liaison, Eucharist Minister, Altar Guild, DOK, Usher, Greeter, and VBS staff. Both of our grandsons were baptized at St. Simon's, and we consider it our extended family.

I am interested in serving on Vestry to help shepherd our church family as we continue to determine our way forward over the next few years.

Ashleigh Pristas

I am a native of Mobile, Alabama and was baptized and confirmed in St. Luke's Episcopal Church. I received my undergraduate degree from Auburn University and master's degree in speech language pathology from MGHHP, in Boston, MA. I currently serve as a Regional Director of Clinical Services and oversee therapy programming in Missouri, Arkansas, south Alabama, and Florida. I moved to Fort Walton Beach, FL after meeting my husband, Kirk.

I found St. Simon's by way of the Craft Fair. Kirk, and I decided to join the congregation shortly after. Kirk and I were married in St. Simon's in 2022 and have enjoyed becoming a part of parish life. I currently serve as a greeter and am a recent member of the flower guild. I also volunteer with the blessing bag project for the homeless children of Okaloosa County and enjoy volunteering wherever I can. Kirk and I have one fur baby, a playful Jack Russell, named PJ.

Ellen Sheppard

In 1978 I student-taught at Ft. Walton Beach High School and began attending St. Simon's at that time. I had worked at Episcopal Church camps and led Episcopal Youth Programs for several years in the Diocese of Florida and in the Diocese of Western North Carolina. Having been baptized as an infant in the Church of the Good Shepherd in Jacksonville, FL, I have been active in the Episcopal Church my entire life.

During the 70's and 80's I ran St. Simon's EYC program and was involved in the Diocesan Youth programs. Throughout my time at St. Simon's, I have led music with children, have developed and helped with Vacation Bible School, and have provided special music programs. I am an EFM graduate.

After my retirement in 2009 from teaching High School mathematics, I served on the Vestry and as Senior Warden. I have served on search committees for clergy and for other positions here at St. Simon's.

Currently I am a member of the choir and play with the handbell choir. I provide music and songs with Children's Chapel as well as for other church events.

Vestry Members who have completed their terms:

Elizabeth Hogencamp

Liz LaFollette

Kristin Shinnick

The entire Parish is grateful for your service!

Rector's Report

Submitted by Reverend J. David Knight

2023 reminded us, once again, that we can never predict what may be coming our way. Personally, for me, 2023 was one of the most challenging years of my 21-year ordination life. Due to my health issues, I spent over two weeks in the hospital (in January and February), then for over three months had to have IV infusions twice a week in Pensacola. We are blessed to have an outstanding staff and fantastic volunteers, and I am grateful for all who serve God in this place. And the good news is – I am doing much, much better health wise, ready to join you in facing the challenges and celebrating the joys of our life together as the body of Christ at St. Simon's. I appreciate everyone's prayers and support.

As outlined in other parts of this report, 2023 also found us as a body of Christ facing together some difficult truths about our financial picture and our physical plant. Please see Matt Smith's report on where we currently stand with the Task Force organized to address some of these concerns, along with the Stewardship Realty report we anxiously await.

Meanwhile the work of the church and its people continue. There are many highlights to mention from the past year. Led by Kristin Shinnick and a host of volunteers, St. Simon's became the first parish to host a Happening event (a renewal weekend for high schoolers) since Covid in 2020. I was so happy and proud of how everyone came together to provide meals, transportation, showers, and in many other ways supported our diocesan youth and the Happening staff.

In 2023 we also saw the return of Children's Chapel. Our program for children's formation had taken a big hit since Covid, with 16 children under 12 relocating to other communities (most of whom, of course, were military families). Under JoAnne Connell's able and amazing leadership, we have been so blessed by a small army of adult volunteers who are doing a wonderful job with Children's Chapel each week. From a small (1 or 2) number of children attending, to as many as 12 on a Sunday, the program continues to grow and, more importantly, to teach our children the important stories of our faith.

We continue to be blessed by our hard-working volunteers such as our Altar Guild, Flower Guild, Ushers, Greeters, Audio Video support (see below), work day volunteers, those who provide food for our suppers, events, and receptions, extraordinary decorators, and so many others who offer God given gifts to this Parish. Thank you so much.

Another highlight was the replacement of our outdated and struggling sound system in the Nave with a new system, resplendent with new speakers and microphones. The result has been very much appreciated by our parishioners. Special thanks to all who have volunteered to manage our A/V system on Sundays and for special occasions. Jennifer Knight spent over two years (since Covid) handling that job very well, and now we are in the capable hands of Rob Mackin and Paul Wheelless. As always, we can use some more volunteers for that duty!

Our parish has continued to help others in our community. Our continued support of Elliott Point Elementary School in a variety of ways makes a difference to the children as well as the faculty and staff. You have answered the call to support food insecurity through quarterly providing LOTS of food for Sharing and Caring to distribute. And our Blessing Bags project, supporting homeless school children in Okaloosa County, continues to grow as we respond to this tremendous need. Meanwhile jambalaya ruled the day with our Mardi Gras fundraiser, led by Liz LaFollette.

2024 will have its challenges. Last week our long-time Choir Director, John Leatherwood, announced his retirement. Easter Sunday will be his last “official” day after over 40 years of service to our church and many more to the community at large and in his teaching role. We will celebrate his ministry as we get closer to the date, and your prayers for how we proceed in filling his impossible-to-fill shoes are appreciated. More information to come soon, for now I am in denial!

I look forward to working with our new Vestry this year. And today we say goodbye to three excellent Vestry persons who have completed their terms – Elizabeth Hogencamp, Liz LaFollette, and Kristin Shinnick. You will be missed but I know you will continue to bless our parish in significant ways. Thank you!

I am now halfway through my eighth year as your Rector. In September I will pass a milestone myself, St. Simon’s will then be the place I have served the longest as a Priest. I continue to love coming to work, to strive together with all of you wherever and however the Lord leads us. I love you all and cannot describe how blessed I am to walk alongside you. Let’s have a wonderful, Christ filled 2024.

Pastoral Acts 2023

Baptisms – 5; Burials – 10; Weddings – 2; Confirmations – 3; Holy Eucharists Celebrated - 94

DEACON'S REPORT

Submitted The Rev. Clelia P. Garrity, LCSW

Associate for Community Engagement and Pastoral Care

In 2023, 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 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
- Development of Fundraising activities for community service projects (i.e. The Italian Night Gala)
- 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 Refugee Ministries

OTHER

- Appointed by the Bishop as the diocesan representative for the national Global Mission Advocate Taskforce
- Inducted as a member of the Fort Walton Beach Rotary Club

Senior Warden's Report Submitted by Bob Blake

It has been a pleasure serving St. Simon's as your Senior Warden this past year. I admit to some surprise over Fr. David inviting me to consider it, and I hope with your prayers and the support of the Vestry I have served as best I could.

Upon accepting the position, the financial forecast for our Parish was not promising, with pledges and plate revenue declining or stable at best. This required your Vestry to evaluate closely all expenses for potential cost cutting measures.

At the 2023 Annual Meeting our Treasurer, Steve Brown, and Junior Warden, Matt Smith, gave a presentation outlining the trends over several years regarding giving and membership, which were greatly affected by the pandemic and subsequent difficulties. They also highlighted some major capital outlays which will be needed in the near term for our physical plant to be able to sustain us.

Following this presentation, the Vestry, with Matt Smith chairing, decided to form a Task Force to help us understand the pros and cons of staying where we are or relocating the church. Meanwhile the Diocese entered into an agreement with Stewardship Realty, a group that specializes in helping churches in situations like ours. We anxiously await the next phase of their work, which we should have by the end of January. Please refer to Matt Smith's report for more information about that.

You will note from the Rector's Report an update on Fr. David's health issues in 2023, and we give thanks to God he is doing much, much better.

The Task Force did deliver a well-intentioned survey to the Parish, hoping to get at least an idea of the likes and dislikes of parish life. The Task Force and the Vestry have taken these survey results under advisement and will use these results to help in decision making going forward.

The Vestry did revise the overall budget going into 2024, with consolidation of functions and drawdown of lesser contributing items. We are still concerned about our financial position as upkeep of the facility is of major concern for any large outlay. However, we were greatly pleased by the response to our fall stewardship drive and as you will see, thanks to your generosity, we will present a balanced budget for 2024.

It has been an honor and privilege to serve on your Vestry and as your Senior Warden. May God bless you and our Parish.

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 2024.

Our property management approach in 2023 was largely reactive due to the nature of our operating budget and the ongoing analysis to determine the direction we take the property. Major repairs this year were relatively few. We repaired one of the upstairs HVAC systems, replaced a hot water heater (thanks Trace Mills!), and repaired the security camera system. We also elected to remove the memorial pavers from the outdoor chapel due to the ground collapsing underneath them. We have secured all the pavers and will determine their home once we chart our future course.

Last year's annual meeting illustrated that our operating and maintenance costs outpace our annual revenue. Simply put, our current model is unsustainable. To that end the Vestry formed a task force, comprised of two teams, to develop viable future state concepts. One team focused on how to sustain the status quo, and the other on relocating to a more sustainable location. Sometime after the Task Force began their work, the Diocese entered into a pre-development agreement for Saint Simons with Stewardship Realty. Stewardship Realty specializes in property development partnerships and property analysis exclusively to faith-based organizations. What this means is there are three teams developing operating concepts for our Church and the Diocese to consider. Each will deliver their report/business case analysis at the end of January. After the Vestry has time to critically analyze the concepts, a conversation with the congregation will occur through a series of town halls. We will determine what is feasible relative to our goals and the options laid out in the conceptual analysis. The Vestry, which is canonically responsible for all matters concerning our property, will remain in close coordination with the Task Force teams, Stewardship Realty and the Diocese. We anticipate that we will complete our deliberations and arrive at a decision this April. We are thankful for the Task Force's hard work and their commitment to the long-term health and success of Saint Simons. Please keep the Task Force and the development process in your prayers

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.

Treasurers Report Year-End 2023
Submitted by Steve Brown, Treasurer

Financial position as of 31 Dec 2023

Year to date operating revenues:

| | |
|---------|---------------|
| Plate: | 104,281 |
| Pledge: | 436,912 |
| Other: | <u>58,975</u> |
| Total: | 600,176 |

Year-end revenues were 4.6% less than projected...plate and pledge were 5K less than last. The plate was 27K less than last year while pledges were 22K above last year.

Year to date expense:

Total operating expenses: 605,096

Year-end expenses were 25.5K below our budgeted projections primarily due to the termination of the Children/Youth Ministry Director position early in the year.

Summary: We ended the year with a 4.9K budget shortfall.

The cash position in the general operating fund is \$174,874. Cash position in the major repairs/columbarium fund is \$65,458. We have 150K in the Reserve Money Market account, and 118K in the Endowment Fund.

Administration Report

Submitted by Cynthia L Gillespie

Finance & Office Manager

As 2023 ends, I look back on all the tragic and catastrophic events that have happened around the world, the ongoing Russia-Ukraine war, the Maui wildfires, the Turkey-Syria earthquake, the Libya flooding, and the Israel-Hamas war, to name a few. These shattering events have left millions of people with the devastating loss of loved ones, homes, worship centers, schools, and whole communities.

Then I reflect on where I've been and what I have been doing during this same time. I have been truly blessed and privilege to have been a part of the St. Simon's Community. During 2023 I have had the privilege to work and worship with so many wonderful and loving people. Some of the programs that we were involved in were as follows:

- The Blessing Bag Program
 - During 2023 we held three blessing bag packings, totaling 600 bags of hygiene products, to be distributed to more than 465 Okaloosa County School District homeless children. The Program also sponsored "The Winter Warmth Ministry", donating winter break gifts such as 495 pairs of socks, innumerable colorful knitted caps, and 10 cases of books.
- Sponsorship of Elliott Point Elementary School
 - The sponsorship provides healthy snacks for the children, Kleenex and disinfecting wipes during flu season, a hoodie drive, an archery team scholarship, and teachers' appreciation breakfast and luncheon.
- The Quarterly Sharing and Caring Food Drives.
 - The 2023 quarterly food drives successfully provided thousands of pounds of non-perishables to the local Sharing & Caring Food Bank.

St. Simons also hosted a "Guest Speaker" series for parishioners to enjoy and learn from. The speakers included:

- Ken Winzeler, President of Sharing & Caring – Feeding the Food Insecure in Okaloosa County
- Kristin Shinnick - Our Mission on the Texas/Mexican Border
- Stephanie Wedel & Deanna Trujillo from Freedom Life Compass - Serving the Forgotten and Lost in Okaloosa County.
- Amy Dale Title 1/1X Program Director - Okaloosa County School District – Homeless School Children
- Diane Freeman, Executive Director of A Bed 4 Me - A nonprofit organization providing beds for children who would otherwise be sleeping on the floor or in inadequate spaces.
- Ashley Bailey, Crime Prevention Specialist of the Okaloosa County Sheriff's Department – Senior Fraud and Scam.

Other Events experienced during 2023 at St. Simon's:

- Mari Gras Church Fundraiser – Jambalaya, Cajun Pickles & Bake Sale
- Pentecost Luncheon “A Journey to Jerusalem . . . one bite at a time
- Italian Gala Night – Fund Raiser for Blessing Bags
- The Reverend Ansley Walker’s “Send Off” to her new call as the Associate Rector at St. Luke’s in Darien, Ct.
- Hosting Happening Weekend
- Welcoming SewLove into our family and our facility- SewLove is a local ministry that sews clothing and other items for communities in which children and young adults are impoverished and strangers to the comforts of life that we take for granted.

2023 was devastating for many people in this world, but not so for the community of St. Simon’s on the Sound. It may have seemed difficult at times, but by working as a community we have had a blessed, busy, and fulfilling year.

Flower Guild Report

Submitted By Chris Westphal

Our Flower Guild is Five Teams Strong. That, coupled with our congregations generous nature, the Flower Guild was able to offer many beautiful tributes to our Lord this year. With your participation in our annual Lilly and Poinsettia sales and various memorial/thanksgiving offerings, the Flower Guild has been able to keep the high standards it has presented for many years. The Flower Guild works every Saturday beginning at 9:00 AM. We welcome anyone that is interested in joining us in our efforts. Thank you for your financial support as we are funded only by your extra offerings.

Altar Guild

Submitted by Chris Westphal and Kelley Fuller

The Altar Guild consists of over a dozen parishioners who maintain and prepare the altar and its furnishings for church services and special events. The chalices, linens, hanging, candles, and torches are among the items used for communion on Sunday mornings and for baptisms, funerals, Eucharist visits, and special services. Each has a special name, a special significance, and a special placement on the Altar. The care for these items and the preparation of the table where we have Eucharist (which literally means “thanksgiving”) is a ministry and is one of the holiest works that that we can participate in within our church.

In addition to the care of the sacred items used for Eucharist, the Altar Guild is also charged with procurement of wafers, wine, and candle oils with budgeted parish funds.

We are thankful for our wonderful team of volunteers and always welcome new Altar Guild members.

Budget Year January 2024 thru December 2024

| Account Number | Account Name | 2023 Budget | 2023 Actual | 2024 Proposed |
|--|---|------------------------|------------------------|--------------------------|
| MINISTRIES | | | | |
| 550011 | DIOCESE PLEDGE | 51,855 | 51,855 | 54,652 |
| 550024 | COMMUNITY ENGAGEMENT | 3,000 | 3,000 | - |
| 550029 | CHRISTIAN EDUCATION | 4,400 | 1,393 | 2,000 |
| 554511 | ALTAR GUILD EXPENSE | 2,000 | 2,092 | 2,000 |
| 554513 | MUSIC/CHOIR EXPENSE | 6,000 | 5,702 | 6,000 |
| 554515 | PARISH LIFE/HOSPITALITY | 4,000 | 3,559 | 4,000 |
| 554521 | CONVENTION/RETREATS | 870 | 1,835 | 1,000 |
| 554522 | STEWARDSHIP | 500 | 261 | 500 |
| 554523 | WORSHIP | 1,000 | 1,267 | 1,200 |
| **TOTAL** MINISTRIES | | 73,625 | 70,964 | 71,352 |
| OPERATIONS-UTILITIES/INSURANCE | | | | |
| 552111 | GENERAL INSURANCE | 53,169 | 56,271 | 67,250 |
| 552112 | WATER, SEWER & GARBAGE | 7,000 | 6,446 | 6,510 |
| 552113 | PEST CONTROL | 1,000 | 900 | 1,000 |
| 552114 | GAS | 1,000 | 874 | 1,000 |
| 552115 | FIRE PROTECTION | 5,000 | 3,616 | 4,000 |
| 552116 | ELECTRIC | 35,000 | 31,409 | 33,500 |
| **TOTAL** OPERATIONS-UTILITIE/INSURANCE | | 102,169 | 99,516 | 113,260 |
| GENERAL MAINTENANCE | | | | |
| 566742 | LANDSCAPING | 500 | 1,326 | 1,500 |
| 566743 | JANITORIAL SUPPLIES | 2,000 | 2,220 | 2,500 |
| 566744 | REPAIR & MAINTENANCE | 12,000 | 12,229 | 15,000 |
| **TOTAL** GENERAL MAINTENANCE | | 14,500 | 15,775 | 19,000 |
| OFFICE | | | | |
| 566721 | OFFICE SUPPLIES | 5,000 | 5,639 | 5,000 |
| 566723 | OFFICE EQUIPMENT | 6,000 | 9,713 | 7,000 |
| 566724 | OFFICE POSTAGE | 500 | 518 | 500 |
| **TOTAL** OFFICE | | 11,500 | 15,870 | 12,500 |
| COMMUNICATIONS | | | | |
| 567741 | COMMUNICATION - MISC | 200 | 327 | 300 |
| 567743 | TELEPHONE | 4,000 | 4,646 | 4,800 |
| 567745 | COMPUTER - TECH SUPPORT | 3,500 | 3,605 | 3,500 |
| 567746 | COMPUTER-INTERNET & WEBPAGE | 3,000 | 3,512 | 3,600 |
| 567747 | COMPUTER - REPAIR | 200 | 563 | 200 |
| **TOTAL** COMMUNICATIONS | | 10,900 | 12,653 | 12,400 |
| OPERATIONS-OTHER | | | | |
| 566752 | BANKING & INVESTMENT FEES | 5,000 | 3,011 | 3,200 |
| 566753 | AUDIT FEES | 3,500 | 3,500 | 500 |
| 566731 | SECURITY ASSISTANT | 750 | 360 | 500 |
| 575020 | MAJOR REPAIRS/COLUMBARIUM TRANSFERS-OUT | 12,000 | 12,000 | |
| **TOTAL** OPERATIONS-OTHER | | 21,250 | 18,871 | 4,200 |
| PERSONNEL/CLERGY | | | | |
| | Salaries & Stipends | 305,397 | 286,009 | 275,860 |
| | Health Insurance | 45,000 | 44,474 | 44,192 |
| | Pensions | 24,820 | 25,849 | 24,344 |
| | Continuing Education | 1,000 | | 1,000 |
| | Travel Reimbursement | 3,000 | 2,658 | 3,000 |
| | Sabbatical | 1,200 | 1,200 | 1,200 |
| 566862 | PAYROLL OUTSOURCE FEE /Payroll software | 3,500 | 3,682 | 500 |
| 566864 | PAYROLL TAXES (7.65%) | 12,800 | 8,091 | 8,000 |
| **TOTAL** PERSONNEL/CLERGY | | 396,717 | 371,963 | 358,096 |
| **TOTAL** OPERATING BUDGET TOTALS | | 630,661 | 605,612 | 590,808 |