

the Trinity Episcopal Church Martinsburg, West Virginia Annual Report

Trinity—
A welcoming,
Christ-centered Community:
Seeking God's will,
Sharing God's wisdom,
Serving All people.

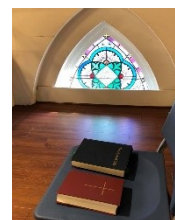
for the year 2023

January 28th, 2024 Meeting Agenda

- In-Person and Zoom Meeting Gathering
- Opening Worship
- Acceptance of 2023 Annual Meeting Minutes
- Recap of 2023 Activities
- Vision 2024: Legacy and Possibility
- Recognition of Outgoing Parish Leaders
- Election of New Vestry Leadership and Convention Delegates
- Election of Parish Trustees
- Adoption of 2024 Budget
- Blessings and Dismissal

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Opening Worship

Leader: Jesus says, "I am the Way for you."
All: And so, we come to follow Christ.

Leader: Jesus says, "I am the Truth for you."
All: And so, we come to dwell in the light.

Leader: Jesus says, "I am the Life for you."
*All: And so, we come,
leaving behind all else to which we cling.*

Leader: We are not alone.
We live in God's world.

All: We believe in God: who has created and is creating, who has come in Jesus, the word made flesh, to reconcile and make new, who works in us and others by the Spirit. We trust in God. We are called to be the church: to celebrate God's presence, to live with respect in creation, to love and serve others, to seek justice and resist evil, to proclaim Jesus, crucified and risen, our judge and our hope. In life, in death, in life beyond death, God is with us. We are not alone. Thanks be to God. Amen.

Prayers for those who have died since the last Annual Meeting, especially, Wallace Bishop, Judith McInyre, Dr. Hick Hamilton, and Mary Keesecker.



From the Rector

January 18, 2024

Dear Trinity family,

As we come together for our annual meeting, it is a moment filled with reflection and gratitude for the remarkable milestones we achieved collectively in the past year. Your unwavering commitment and contributions have left an indelible mark on our community, shaping it into a vibrant tapestry of love and service.

One of the notable highlights of the past year has been our dedicated support for CCAP. Beyond participating in food drives, Trinity members have actively taken roles on the CCAP board of directors, demonstrating our deep-rooted commitment to making a positive impact on those in need. Our annual pancake supper surpassed all expectations, with a tremendous turnout that spoke volumes about the unity and enthusiasm within our Trinity family. Additionally, we engaged in various community events that further strengthened our bonds.

Investments in our property reflect our commitment to maintaining a welcoming and aesthetically pleasing environment. The replacement of yellow plexiglass and the fresh coat of paint on wood trim have transformed our space into a visually appealing haven. We also undertook essential maintenance on one of our aging HVAC systems, ensuring the comfort of our congregation and church offices.

Looking ahead to the coming year, our focus remains on both continuing the successful events of the past and expanding our religious study programs. With your unwavering support and active participation, we aim to make Trinity a place where individuals seek to connect with the risen Christ and find a supportive community.

Your participation in this collective journey is invaluable, and I extend a heartfelt encouragement to each one of you to join hands as we embark on another year of growth, service, and fellowship. As mentioned in my E-tempo letter, while we have experienced losses, we have also welcomed new members into our Trinity family, creating a dynamic and evolving community.

Thank you for your steadfast dedication to our shared mission. May the coming year be filled with abundant blessings for each member of our Trinity family.

Blessings,

Bobby+

Parish Staff and Vestry

VII Bishop of West Virginia

The Rt. Rev. Matthew Cowden

Staff

Rev. Robert E. Shives	<i>Rector</i>	(256) 452-2905
Coty Graff	<i>Music Director/Organist</i>	(304) 702-1426
Lisa Miller	<i>Parish Administrator</i>	(304) 279-0114
Open	<i>Nursery Attendant</i>	(304) 263-0994
Peter Brewster	<i>Sunday Sexton</i>	(304) 263-0994

Vestry Executive Committee-

Pat McMillan	<i>Senior Warden</i>	(304) 671-8324
Peter Brewster	<i>Junior Warden</i>	(202) 664-2471
Ann Hill	<i>Treasurer</i>	(304) 279-8623
Kiley Budka	<i>Assistant Treasurer</i>	(410) 991-2953
Lisa Miller	<i>Clerk/Registrar</i>	(304) 279-0114

Vestry

Term Ends in December 2026

Pat McMillan
Linda Guest
David Gum
Brady Boccucci
Nicole Taggart
Karen Smith
Colleen Tucker
Peggy Whetzel

Term Ends in December 2025

Angela Sholough

Term Ends in December 2024

Cathy Ruley
Jason Stedman
Peter Brewster

TRINITY EPISCOPAL CHURCH **MINUTES OF THE ANNUAL CONGREGATIONAL** **In Person and ZOOM Meeting** **February 26th, 2023 @ 9:00 am**

- I. Phil Steptoe, Senior Warden welcomed the members of the congregation to the meeting.
- II. The Very Rev. Robert Shives led the congregation in Opening Prayer.
- III. Rev. Shives called the meeting to order at 9:00 am.
- IV. Lisa Miller presented the Minutes of the January 23rd, 2022, Annual Meeting to the parishioners for approval. A motion to approve the minutes as presented was placed by Lynne Steptoe and seconded by Sharon Novak. The motion was approved unanimously by the congregation with one Nay from Jason Stedman.
- V. Senior Warden Report: Phil Steptoe presented a Re-Cap of the year for 2022. He expressed gratitude to everyone that has been keeping the church going the past year, especially our Interim Rectors, the Parish Administrator, worship leaders, tech leaders, Junior Warden, and the Sunday Sexton.

Election of Nominees: Phil Steptoe announced the new Vestry nominees for Trinity for 2023 will be: Angela Sholough and Phil Steptoe, who will be Senior Warden for another one-year term. Nina Arnett motioned to accept the nominees to Vestry. Tiffany Arnett seconded the motion. Jason Stedman called for the question; The motion was accepted unanimously by the congregation. Phil recognized and thanked the outgoing members of the Vestry for their commitment and ministry: Ann Hill was thanked for being our Treasurer and Kiley Budka as Asst. Treasurer.

Election for the Deanery and Convention: The Convention will be in Martinsburg this year on October 26th-28th. We have two nominees for Diocese Convention Delegates: Linda Guest and Lisa Miller. Nina Arnett and Tiffany Arnett will be Alternates as needed. David Gum voted to accept the nominees for the Convention. Sharon Novak seconded the motion. The motion was approved unanimously by the congregation.

Election of Officers: Slate of officers are Ann Hill as Treasurer, Kiley Budka as Assistant Treasurer, and Lisa Miller as Clerk of the Vestry. Lynne Steptoe motioned to accept the officers as presented. Tiffany Arnett seconded the motion. The officers were approved by the congregation unanimously.

Election of the Trustees: Slate of Trustees are Lucien Lewin, Buzz Poland, Nina Arnett, and Greg Janes. A motion to accept the Trustee was placed by Lynne Steptoe and seconded by Jason Stedman. The motion to accept the Trustees was approved unanimously.

Election of Norborne Cemetery Committee members: Buzz Poland as Chairperson, Mary Boyd Kearse, Susan Etherington, and Peter Brewster. A motion was placed by Greg Janes to accept the nominees, and the motion was seconded by Jason Stedman. The motion was approved unanimously by the congregation.

Stewardship was presented to the congregation; We have 60 units pledging \$196,000.00 with several parishioners giving without pledging. We need to increase membership to grow the church. We have new management with Rev. Bobby and with Bishop Cowden.

- VI. Rector's Report: The Very Rev. Robert Shives thanked everyone for coming to the meeting. He stated that the parishioners of Trinity were very welcoming. The upcoming events will be Bishop Cowden's visitation with Trinity on Palm Sunday. He will contact the ministerial association for more details of the processional of the churches. Easter Sunday and Convention at the Martinsburg Holiday Inn on October 26th-28th, 2023. Trinity will be hosting the convention. The Bishop and Rev. Bobby hope to include a visit to the Historic Bunker Hill Chapel. Things to think about are transportation and Gift Bags. Rev. Bobby informed the congregation that Lent is a time to reflect. Think about where you want Trinity to go as a group? Where Trinity needs to be in 3-5 years. What missions you do want us to be a part of? How do we get there? He encourages the congregation of Trinity to look to the future and ask Jesus for guidance. He wishes for the congregation to use their social media and share Trinity's FB and streaming each and every week. Let people see who, what, and where we are.
- IX. Ann Hill, Treasurer presented the 2023 Budget to the congregation for approval. This is a flat budget. The balanced budget of \$331,000 is for income and expenses. Questions were welcomed. Greg Janes motioned to accept the 2023 Budget as presented. Lynne Steptoe seconded the motion. The Budget for 2023 was accepted by the members of the congregation unanimously.
- X. Investment Allocations: Ann Hill presented to the congregation for approval the allocation of funds from the investment accounts. Trinity may need to transfer \$100,000.00 from the Trust Fund to the Operating Fund for clergy expenses. This will be done on a needy basis. Greg Janes motioned to accept the allocation of funds from the Investment accounts. Lynne Steptoe seconded the motion. The motion was approved unanimously by the congregation.
- XI. Closing Prayer was given by the Rev. Robert Shives
- XII. The Rev. Robert Shives thanked everyone for coming to the meeting and adjourned the meeting. Thanks, be to God. The meeting was closed at 10:00 am.
- XIII. Respectfully submitted by Lisa Sorrentino-Miller, Clerk of the Vestry 02/27/2023

Nominees and Officers

New/Re-Elected Vestry Nominees for 2024

Pat McMillan, Senior Warden 2026

Peter Brewster, Junior Warden 2024

Linda Guest, Member 2026

David Gum, Member 2026

Brady Boccucci, Member 2026

Nicole Taggart, Member 2026

Karen Smith, Member 2026

Peggy Whetzel, Member 2026

Colleen Tucker, Member 2026

Returning Vestry Members

Cathy Ruley, Member 2024

Jason Stedman, Member 2024

Angela Sholough, Member 2025

Deanery and Convention Nominees for 2024

Linda Guest, Lay Delegate

Lisa Miller, Lay Delegate

Officers

Pat McMillan, Senior Warden

Peter Brewster, Junior Warden

Ann Hill, Treasurer

Kiley Budka, Asst. Treasurers

Lisa Sorrentino-Miller, Clerk of the Vestry

Trustees for 2024

Nina Arnett (2024)

Lucien Lewin (2025)

Greg Janes (2026)

Clerk of the Vestry-2024

Lisa Sorrentino-Miller

Norborne Cemeteries Nominees for 2024

Buzz Poland, Chairperson

Susan Etherington, Chairperson

Mary Boyd Kears, Member

Peter Brewster, Member

Budget 2024

	2016	2017	2018	2019	2020	2021	2022	2023	2023	2024	
OPERATING REVENUE	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Approved	Proposed	Comments
Pledged Offerings	\$225,462	\$232,756	\$226,984	\$224,753	\$205,736	\$218,937	\$176,263	\$221,095	\$200,000	\$225,000	
Open Plate Offerings	\$6,105	\$11,602	\$7,527	\$15,632	\$5,299	\$2,216	\$2,370	\$6,743	\$3,000	\$3,100	
Special Offerings	\$5,056	\$5,220	\$4,390	\$5,280	\$4,900	\$4,362	\$2,875	\$6,730	\$4,000	\$4,000	Flowers, Wine, Bread
Norborne Pre-school Contribution	\$8,250	\$9,000	\$9,000	\$9,000	\$6,750	\$9,250	\$11,200	\$11,783	\$12,000	\$12,000	
Other Parish Income	\$3,051	\$1,416	\$2,076	\$696	\$12,326	\$3,690	\$3,158	\$350	\$2,100	\$3,000	Outreach Income
Investment Fund Income	\$9,254	\$8,348	\$8,857	\$59,294	\$8,776	\$27,576	\$27,000	\$15,983	\$10,000	\$12,000	
(Transfer Out) Income from Investments									\$100,000	\$68,000	Funds Transfer-Trust
TOTAL OPERATING REVENUE	\$257,178	\$268,342	\$258,834	\$314,655	\$243,787	\$266,031	\$222,866	\$262,684	\$331,100	\$327,100	
OPERATING EXPENSES	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Approved	Proposed	
Building											
Sexton Salary	0	0	0	0	0	0	0	0	3000	0	
Major Capital Expenses	1467	1599	1243	543	0	0	0	10,000	0	10000	
Insurance	\$4,638	\$5,077	\$5,491	\$5,809	\$5,053	\$6,165	\$7,235	\$7,608	\$7,300	7300	
Repairs and Maintenance	\$6,003	\$5,731	\$7,296	\$5,748	\$5,825	\$5,321	\$4,791	\$4,892	\$6,000	\$6,000	
Security	\$985	\$272	\$1,346	\$268	\$894	\$805	\$1,606	\$40	\$1,000	\$800	
Kitchen/Janitorial Supplies	\$192	\$14	\$240	\$98	\$452	\$126	\$390	\$83	\$500	\$250	
Janitorial Service (Sexton)	\$0	\$0	\$0	\$0	\$2,750	\$1,521	\$249	\$1,759	\$3,500	\$1,700	
Electric	\$15,063	\$15,485	\$18,356	\$17,454	\$12,309	\$14,789	\$12,198	\$17,100	\$16,000	\$16,000	
Water/Sewer/Trash (City of Mbg)	\$3,425	\$3,857	\$3,769	\$2,950	\$3,176	\$4,961	\$1,664	\$4,202	\$3,500	\$3,500	
Total Building Expenses	\$31,773	\$32,035	\$37,741	\$32,327	\$30,459	\$33,688	\$28,133	\$45,684	\$40,800	\$45,550	
Administration											
Office Administrator Salary	\$30,496	\$30,137	\$30,555	\$32,472	\$43,821	\$40,375	\$41,772	\$49,160	\$43,000	\$45,000	3.67% COL
Office Administrator Pension	\$3,022	\$3,596	\$3,913	\$3,931	\$4,260	\$4,560	\$3,600	\$5,185	\$5,200	\$4,500	
Office Administrator Health Ins.	\$9,528	\$10,128	\$10,992	\$11,424	\$11,231	\$13,156	\$13,728	\$15,347	\$15,000	\$15,000	
Office Administrator CE	\$697	\$574	\$125	\$643	\$384	\$1,008	\$750	\$0	\$750	\$750	
Office Administrator Mileage	\$0	\$0	\$0	\$12	\$0	\$0	\$250	\$0	\$200	\$300	
Office Administrator Life Ins.	\$162	\$162	\$162	\$162	\$149	\$162	\$165	\$162	\$300	\$300	
Office Administrator Prof. Exp.								\$370	\$500	\$450	Cell Phone
Office Supplies	\$993	\$1,040	\$855	\$1,195	\$836	\$1,256	\$1,194	\$1,393	\$4,500	\$3,000	Computers
Printing/copying Expenses	\$2,938	\$2,712	\$2,813	\$2,827	\$2,508	\$3,827	\$2,721	\$3,343	\$3,000	\$3,000	
Postage	\$672	\$458	\$817	\$550	\$829	\$1,013	\$375	\$335	\$800	\$300	
Information Technology	\$5,608	\$4,282	\$4,644	\$4,914	\$6,844	\$9,503	\$6,796	\$10,400	\$8,000	\$7,500	Phone, Internet, TV
Other expenses	\$2,141	\$1,719	\$1,939	\$2,053	\$5,277	\$11,385	\$2,228	\$939	\$2,000	\$2,000	
Taxes/Social Security/WC	\$3,932	\$3,803	\$3,901	\$3,979	\$4,860	\$4,608	\$8,827	\$13,949	\$7,000	\$5,000	
Total Administration Expenses	\$60,189	\$58,611	\$60,716	\$64,162	\$80,999	\$90,853	\$82,406	\$100,583	\$90,250	\$87,100	
Clergy											
Rector Salary	\$44,596	\$46,996	\$49,596	\$51,996	\$0			\$38,880	\$42,000	\$45,000	3.67% COL /\$80,900
Rector Housing	\$36,000	\$36,000	\$36,000	\$36,000	\$0			\$33,120	\$36,000	\$36,000	
Rector SECA	\$6,000	\$6,000	\$6,000	\$6,000	\$0			\$4,000	\$6,000	\$6,000	
Rector Pension	\$15,156	\$15,192	\$15,192	\$16,919	\$0			\$12,870	\$15,500	\$15,000	
Rector Health Insurance	\$10,464	\$11,124	\$12,072	\$12,540	\$1,395			\$7,916	\$9,100	\$11,500	
Rector Continuing Education	\$565	\$1,284	\$1,560	\$948	\$0			\$0	\$1,200	\$1,200	
Rector Professional Expenses	\$1,424	\$1,557	\$1,538	\$1,323	\$0			\$2,272	\$1,200	\$1,200	
Rector Mileage Reimbursement	\$2,165	\$3,824	\$2,984	\$3,240	\$0			\$3,524	\$3,000	\$3,000	
Rector Other Expenses	\$739	\$1,287	\$0	\$500	\$3,000			\$189	\$500	\$500	
Total Clergy Expenses	\$117,109	\$123,264	\$124,942	\$129,466	\$4,395	\$0	\$0	\$102,771	\$114,500	\$119,400	
Clergy (Intern/Supply)											
Interim Salary					\$22,489	\$22,468	\$17,290	\$0	\$0	\$0	
Interim Mileage					\$2,100	\$2,260	\$1,853	\$0	\$0	\$0	
Interim SECA								\$0	\$0	\$0	
Interim Professional						\$104		\$0	\$0	\$0	
Interim Honorarium						\$5,000		\$2,500	\$0	\$0	
Supply Clergy						\$4,260	\$8,790	\$1,650	\$1,300	\$1,000	
Supply Clergy Mileage						\$463	\$893	\$230	\$100	\$250	
New Clergy Search						\$675	\$751	\$385	\$0	\$0	
Total Supply Clergy Expenses	\$117,109	\$123,264	\$124,942	\$258,932	\$33,379	\$35,230	\$29,577	\$4,765	\$1,400	\$1,250	
Ministry											
Children and Youth	\$1,886	\$1,080	\$945	\$1,054	\$777	\$0	\$0	\$44	\$250	\$300	
Christian Education	\$15	\$54	\$46	\$54	\$0	\$0	\$0	\$436	\$250	\$300	
Development/Stewardship	\$390	\$228	\$275	\$122	\$140	\$138	\$450	\$271	\$500	\$500	
Hospitality	\$1,003	\$390	\$894	\$653	\$285	\$485	\$671	\$3,534	\$1,500	\$1,000	
Worship	\$2,922	\$2,181	\$2,828	\$2,943	\$2,344	\$2,746	\$5,587	\$3,756	\$2,500	\$3,000	Supplies/LiveStreaming
Music	\$207	\$586	\$201	\$1,043	\$1,352	\$1,467	\$967	\$1,158	\$1,500	\$1,000	
Organist/Choir Director Salary	\$14,910	\$15,824	\$15,210	\$15,824	\$16,673	\$17,527	\$17,448	\$20,231	\$20,000	\$20,700	3.67% COL
Outreach	\$4,250	\$3,478	\$3,979	\$3,478	\$325	\$13,700	\$19,224	\$13,000	\$5,000	\$3,000	
Other Expense	\$150	\$0	\$150	\$100		\$109	\$872	\$3,715	\$1,650	\$1,000	Convention Expenses
Total Ministry Expenses	\$25,733	\$23,821	\$24,528	\$25,271	\$21,896	\$36,172	\$45,219	\$46,145	\$33,150	\$30,800	
Diocesan											
Assessment	43160	43614	43956	43614	45,893	46845	45197	40964	45000	\$37,000	
Loan Repayment	0	0	6000	6,000	6,000	6000	6000	6000	6000	6000	
Total Diocesan Expenses	43160	43614	49956	\$49,614	51,893	52845	51197	46964	\$51,000	43000	
TOTAL OPERATING EXPENSES	\$277,964	\$281,345	\$297,883	\$430,306	\$218,626	\$248,788	\$236,532	\$340,913	\$331,100	\$327,100	Balanced Budget
	\$20,971	\$13,555	\$39,921	\$-120,477	18,509	17,243	\$-13,666	\$-78,228	\$0.00	\$0	Deficit/Surplus

Meet the Candidates

Nicole Taggart

Nicole Taggart died in Christ at the Easter Vigil on 29 March 1997 being baptized and confirmed in the Episcopal Church. She has been striving to grow in the knowledge of God through service in the parishes that she has worshipped at and through her 25 years of social ministry. Nicole has worked for nearly a decade as the Resident Service Coordinator at Senior Towers Apartments where she links seniors and adults with disabilities to necessary services. Nicole is a bonded federal fiduciary through the Veterans Administration, the 'Tail Twister' of the Martinsburg Lions Club and she gives Rotarians tours through local cemeteries every Halloween. Nicole's equilibrium is managed through saying the Daily Office (she has a penchant for the Order of Saint Helena Breviary), her friends, and her four-legged companions Pepe and Ruby.



Karen Smith

I am a 66+ year old, who has been a member of Trinity Episcopal Church since 1969. I attended Martinsburg High School and a Graduate of Shepherd College. I have been twice married. I know how to keep a budget and believe our youth are our life blood. I will do what I can and follow in that direction.



Peggy Whetzel

Our family has been attending Trinity since 1985. I have served the church in many capacities: Sunday School teacher, Acolyte director, chalice bearer, lector, usher, reader of the prayers of the people, and Vestry member. I am married to George, and we have three grown children and five grandchildren.



Brady Boccucci

I was born on October 30, 1987, in Fairfax, Virginia to Felix L. Boccucci and Connie Lightner-Boccucci. My Dad is a native of Washington, D.C., while my mom grew up in Martinsburg. My Dad was raised Roman Catholic, while my mom attended Calvary United Methodist here in Martinsburg. Due to the “mixed marriage” my parents decided to become Episcopalians on the advice of Rev. Womack at Calvary UMC. I was then baptized at St. Timothy’s Episcopal Church in Herndon, Virginia. My Dad’s job later moved us to Colleyville, Texas near Dallas; Newtown, Connecticut near New York City; and finally, LaGrange, Georgia near Atlanta. I was then confirmed at St. Mark’s Episcopal Church in LaGrange, Georgia. After college I attended college in Cleveland, Ohio, where I lived from 2006 until moving to Martinsburg in January of 2020. In Cleveland I attended St. Paul’s Episcopal Church, which is currently the largest church in the Diocese of Ohio. While a member at St. Paul’s I taught Sunday school, and a volunteer for their youth group program. I currently work in human resources for MedStar Health supporting both the Washington Hospital Center and the National Rehabilitation Hospital in Washington, DC. I live in Martinsburg with my partner Jeremy, and two dogs, Rodney, and Sally.



Colleen Tucker

I was raised Roman Catholic. One of my best friends, a cradle Episcopalian, knew how unhappy I was in the Catholic church and introduced me to the Episcopal Church, where I felt more at home and more welcome as a woman. I began attending Trinity in 2006 and was received into the Episcopal Church in 2008. I am a member of the Altar Guild, the St. Mary’s Guild, and the choir. I currently serve as a lector, and over the years I have served as a preacher, an Adult Formation leader, a worship leader, a member of the vestry, and also as Senior Warden. I also coordinate Trinity’s annual Lent Madness tournament (breaking news: it is returning in 2024). Until I started attending Trinity, I had never been an active member of any parish I joined. I also sit on the donor advisory board of the Kings Daughters Charitable Fund, which is a donor-advised fund for the elderly administered by the Eastern West Virginia Community Foundation. I was born and raised in Connecticut, and I studied history in college and graduate school. I spent 20 years living in Washington, DC (just 4 blocks from National Cathedral) going to graduate school and then working interesting jobs. My last job in DC was my favorite job ever, Acquisitions Editor at the American Geophysical Union. I loved working with scientists developing proposals for our books press. I live in Charles Town with my husband Dave and our 2 cats. In my free time, as many of you know from Facebook, I love to cook.



Stewardship 2023-2024

Statistical Report Stewardship Results Projected As of 12/31/2023.

A total of **57** Giving Units have completed and returned Estimate of Giving Cards committing **\$196,123**.

Our average pledge is **\$3440**.

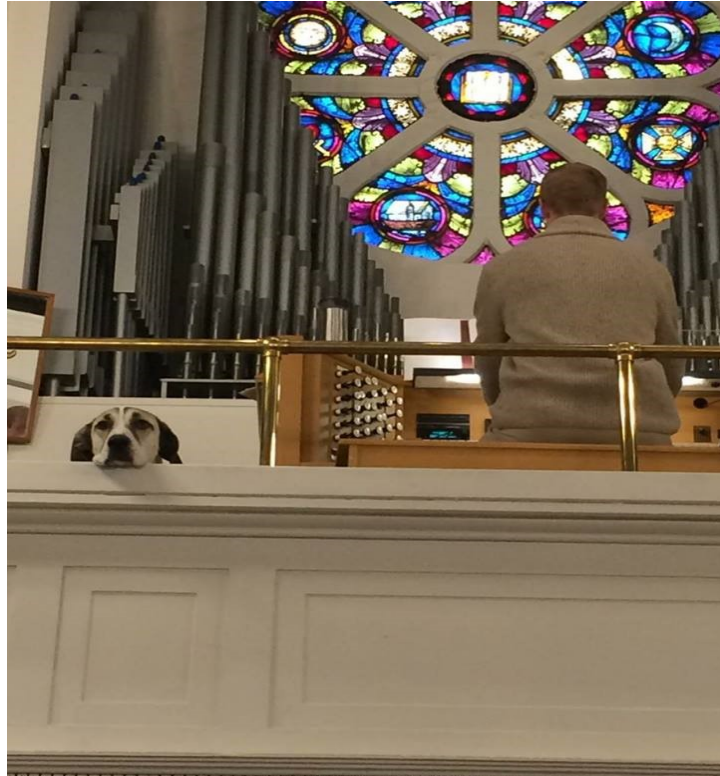
We anticipate receiving additional pledges for a potential of **\$4,000.00**.

A total of **10** still not received but have pledged in past years.

Our initial projection is that this will represent a Flat Revenue Budget in giving's for the year 2024.

Thank You! Thank You! Thank You!

Thank you to our parishioners who have made a commitment to God and returned their Giving card.



We are Grateful and Blessed

2023 Revenues and Expenses

	2023 <u>Budgeted</u>	2023 <u>Actual</u>
Regular Offerings	\$ 203,000	\$ 227,838
Special Offerings	\$ 4,000	\$ 6,730
Other Parish Income	\$ 12,000	\$ 12,133
Investment Fund Income	\$ 10,000	\$ 15,983
<u>Investment Transfer Funds</u>	<u>\$ 100,000</u>	
Total Operating Revenue	\$ 331,000	\$ 262,684

	2023 <u>Budgeted</u>	2023 <u>Actual</u>
Diocesan Assessment	\$ 45,000	\$ 40,964
Building Expenses	\$ 40,800	\$ 45,684
Parish Expenses	\$ 90,250	\$100,583
Clergy Expenses	\$ 114,500	\$102,771
Ministry Expenses	\$ 33,150	\$ 46,145
Parish Outreach	\$ 5,000	\$ 13,000
<u>Diocesan Loan</u>	<u>\$ 6,000</u>	<u>\$ 6,000</u>
Total Operating Expenses	\$ 331,100	\$ 340,913
SURPLUS/DEFICIT		\$-78,228

Financial Notes -2023

- Building Expenses include utilities and repair/maintenance costs.
- Parish Expenses include the costs of running the parish office, printing/mailling, supplies, telephone, and a parish administrator.
- Clergy Expenses include the salary and benefits for our New Rector and Supply clergy.
- Ministry Expenses include all the program expenses for our common life including music, organist salary, worship, spiritual formation, stewardship, evangelism, youth ministry, pastoral care, and this year Convention.
- Outreach is funded by the earnings on our Permanent Endowment Fund. The Vestry worked to increase our parish giving this year to \$13,000.00 in outreach funds and Norborne Preschool allocations.
- The 2024 Budget allows us to maintain current staffing levels and compensation. It includes an adjustment for all staff positions.
- The 2024 Budget assumes that major building expenses will be charged against the Building Fund. We continue to need to address on-going concerns with our HVAC system, building repairs, sewer/septic system, technology upgrades, handicapped accessibility, the courtyard, and parking. In 2024 we hope to continue our Capital Improvement Plan.

Trinity Episcopal Church Capital Investment Funds

Permanent Endowment	\$ 180,700	RDF/Samaritan Fund	\$ 12,696
Building Fund	\$ 16,924	Norborne Cemetery	\$ 770,250
Memorial Fund	\$ 71,930	Columbarium Fund	\$ 20,806
Eastern WV Community (Angel)	\$ 23,952	Eastern WV Community(Schneiderhan)	\$ 84,892
Trust Fund	\$1,245,653	KD Court Senior Fund	\$ 519,455

Senior Warden Report

Dear Trinity parishioners,

Last year was the first of what I hope will be many years of faithful and inspirational ministry here by our rector, the Very Rev. Bobby Shives. I believe that the parish and Rev. Bobby have gotten to know each other well enough to go on with the next steps of building back our church, that of developing a vision and long-range plan that includes growth of the congregation and the ability to finance our mission. My sense of the congregation's desires, confirmed by previous vestry and annual meetings, is that we continue as a family-size church with full-time clergy, and I ask that you continue to affirm that direction.

Here are a few observations from my perspective as senior warden:

1. We welcomed several new members to the congregation and by doing so have increased diversity and lowered our age profile. Trinity remains a largely a congregation of older members, but we are making progress in growing our numbers of younger members.
2. The lay leadership at Trinity is about to transition to include younger and different members in key positions. Both junior and senior wardens, Greg Janes, and I, have served longer than our bylaws permit. Now that we have a full-time rector, we can and should change the lay leadership.
3. Trinity did a tremendous job in hosting the diocesan convention in October. All of our work and expenditures toward improving and beautifying the church and building paid off in the compliments we received from the diocese and convention attendees. Thanks to all who volunteered in preparation for and serving at the convention.
4. We are blessed indeed to now have the Rev Deacon Marti Unger with us as a clergy intern until she is ordained a priest in the near future. Trinity has had assistant rectors in the past, but I do not remember having a serving deacon. Addition of a deacon to our worship services presents us with new perspectives on the liturgy and role of a deacon in the life of the church.
5. We continued our long-range program to improve the church building and grounds, with Greg Janes leading the effort. The stained-glass windows in the church are now protected with new, high-strength glass that will not discolor like the plexiglass it replaces. The church roof is now getting a lot of attention, and its replacement may become our next big project.
6. Now that we have full-time clergy, we must dial back a lot of our community outreach financial support. We remain as major players in community outreach through the volunteer services of many church members with local non-profits. Our primary outreach activity, Norborne Preschool, benefited from over \$30,000 in rent-free space and utility support.
7. All of this is made possible by our church staff, Rev Bobby, Lisa, and Coty, as well as the volunteers who devoted many hours to the church beyond attending worship services.

Now we need to look at our challenges for 2024 and beyond. With a new rector and lay leadership will come new ideas and adjustments to existing programs. Over the next few months, the rector and vestry will have conversations on short- and long-range goals for the church. As always, we are looking for inputs from the congregation to help us decide on what to keep and what to change. Rebuilding our membership is our highest priority, closely followed by re-starting youth programs. We have the spaces, and we will get the volunteers, but first we need the families and children.

This is my last letter to the congregation as senior warden, as the annual meeting this month will elect new wardens. I have learned and grown during my six year term, enjoying the work with staff, congregation and vestry through good and not-so-good times. So, let us all welcome the new wardens and give them and Rev Bobby the support they need to lead our church forward in service to our worship and outreach communities.

Phil Steptoe

Registrar's Report

Membership Statistics

	<i>December 31, 2022</i>	<i>December 31, 2023</i>
Baptized Members	102	105
Active Members	60	55
Number of Households	90	92
Communicants in Good Standing	82	83
Prospective Members	00	00
Holy Eucharist, Sundays	52	53
Holy Eucharist, Weekdays	11	40
Holy Eucharist, Private (Home/Hospital)	15	7
Prayer, Weekdays	67	48
Other Services	09	5
Average Sunday Attendance:	38	52
Number Enrolled Sunday School	0	0

Stewardship

Number of Pledging Units	71	55
Total Pledged	\$200,336	\$193,823
Total Received	\$204,918	\$221,095
Average Gift Amount	\$2,886	\$3524
Burials	3	4
Baptisms	2	3
Confirmations/Receptions	0	1
Transfers In	2	1
Transfers Out	0	1
Marriages	0	0

Baptism

Egloantine Mouslim Henderson
Amory Gregory
Charlize Gregory

Confirmation/Receptions

Jane Elizabeth Edwards

Transfers In

Joy Walter

Transfers Out

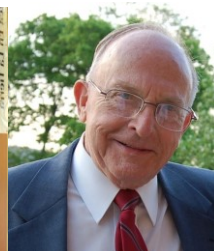
Robert Yates

Marriages

None

Deaths/Burials

Wallace Bishop
Judith McInyre
Dr. Frank "Hick" Hamilton
Mary Keesecker



Thanks Be to God!

