

St. Luke's Episcopal Church, Simeon

P.O. Box 694
Charlottesville, VA 22902
www.stlukessimeon.org

2023 Annual Report



1. **Introduction.** As 2023 closes we are profoundly blessed at St. Luke's where we have found something that remains elusive to so much of our Nation and world. Consider the simple, powerful messages of our mission statement.

*We are a Spirit-filled community of simple grace and acceptance
Where **all are embraced** as children of God.*

*We **proclaim** Christ's love for the world in Word and Sacrament, food and fellowship, sharing and service.
Come As You Are!*

Our mission describes who **we are** as a congregation. It unequivocally states that **all are embraced**; it **announces by proclamation** that our foundation rests on Christ's love, and lastly it **invites all** to enter our open doors into St. Luke's warm embrace.

With our mission as our guide, the following is our St. Luke's Annual Report for 2023. The report documents "who we are" (*a Spirit-filled community*) and how our congregation has evolved over the past year. Subsequently we present what we've done in 2023 as we "...*proclaim Christ's love through sharing and service.*" We conclude the report examining our stewardship of St. Luke's including presenting our 2024 Budget.

1. *Our Leadership, Ministries, and Congregation - We are a Spirit-filled Community*

a. Leadership. Priest in Charge, Fr. Peter Fraser-Morris continued to spiritually lead St. Luke's over this past year supported by Tom Goss, our Senior Warden, and our Vestry. Bob Lamb has been registered as a Trustee. St. Luke's is blessed with a set of volunteers serving in a variety of roles that keeps ensures our doors are open and welcoming.



Leadership and Ministries

Member		Other Leadership	Trustees
Tom Goss	(2023) Senior Warden	Ashby Kindler, Treasurer	Joe H. Gieck
Lou Lamb	(2024) Registrar	Babs Fickes, Minister of Music	E. Donald Fickes
John Down	(2022)		Robert J. Lamb
Sally Gieck	(2023)		
Tom Pitz	(2023) Junior Warden		
Ben Wham	(2024)		
John Davis	(2025)		
Judy Crosby	(2025)		
Committees			
		Outreach Gifting (Joe Gieck)	Stewardship (John Down)
		Cemetery (John Davis)	Budget Committee (Bob Lamb)
		Audit Committee (Ashby Kindler)	Hospitality (Babs Fickes)

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Volunteer Ministries

Acolytes and Servers: Barbara Febey, John Down, Mike Dixon, Bob and Judy Bill, Marta Engdahl, Betty Driskill, John Down, Rick Miller
Bulletins: Don Fickes
Cemetery: John Davis
Communications: Bob Lamb
Eucharistic Visitors: Jan and Bernie Taylor

Altar Guild: Lou Lamb, Judy Bill, Sally Gieck, Pat Perce, Barbara Febey, Elaine Caporizzo
Service Live Streaming: Ben Wham, Bob Lamb, Tom Pitz, Rick Febey
Flowers: Don and Babs Fickes
Safety and Security: Ben Wham
Name Tags: Lou Lamb

Lectors and Greeters: Marta Engdahl, Joe and Sally Gieck, Ashby Kindler, Lou Lamb, Tom Goss, John Down, Tom Torrance, Tom and Linda Pitz, Tom Parker, Martha Down
Eucharistic Ministers: Don Fickes, Rick Miller, John Down, Bob and Marta Engdahl, Barbara Febey, Tom Torrance

Sunday Fellowship Hour: Babs and Don Fickes, Salley Gieck, Jan and Bernie Taylor

b. Congregation and Parishioners. The table below, begun in 2022, summarizes services, attendance and communion received during 2023. The intent from this table and others throughout the report is to gauge the strength and vitality of St. Luke's over time. For example, in 2022 we started tracking and including in our report, the growth of our online presence through our FaceBook followers and viewers of our broadcast services. While the Followers have grown, tracking views of our broadcasted services has proven impossible. Following the table are a set of observations which for 2023 are very positive.

Service, Attendance, Communion Recipients

Year	Services	Total Attendees	Avg Attendees/Service	Total Receiving Communion	Avg. Receiving Communion/Service	Facebook Followers
2022	54	1,488	28	1,380	26	33
2023	57	1803	31.5	1674	30	47

Notes:

2022: 3 services during the year did not have recorded data, 2 of which may have been canceled due to weather
 2023: 1 service lacked data; 2 weeks the attending and communion numbers appeared to be reversed.

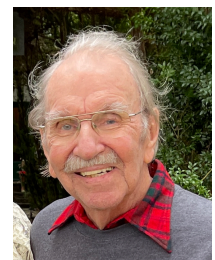
Baptisms	Marriages	Burials and Funerals
1	None	3

A couple of observations from the above data.

- Overall attendance increased by over 400 attendees (21%) over 2022
- Our Facebook Followers has similarly grown by 30%. Interestingly, not all of our “followers” are members of St. Luke's which suggests opportunities to draw more to our church.
- Several long-term parishioners have moved including Bonnie and Dick Edwards as well as Bob and Judy Bill.
- Alternatively, we have new members including Mike Dixon and Betty Driskill

Sadly, in 2023 we lost two of our fellow parishioners.

Bob Kessler passed away on September 12, 2023 at the age of 93. Bob had many roles during his long life: Navy veteran, school teacher, bugler, and even Poet and standup comedienne. Lydia would tell you that his most important and enduring were husband, father, grandfather, and great grandfather.



Jo-Anne Brust passed away on September 1, 2023. Jo-Anne spent most of her professional

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career as a Customer Service Supervisor and before her retirement she was the Parish Secretary for St. Andrew's Episcopal Church in Jacksonville, Florida. She will be remembered for her St. Luke's church video productions that brought joy and thoughtful insights into church celebrations. She also dedicated an immeasurable amount of time, energy, and expertise cleaning up all of the accumulated administrative paperwork for the church.

St. Luke's is richer for the bread we broke and the friendships we shared with Bob and Jo-Anne.

2. What We Do - Proclaim Christ's Love in ... Sharing and Service

a. Managing St. Luke's. There are a host of requirements on churches, both large and small. The strength of St. Luke's in fulfilling those formal responsibilities lies in that table above bringing formal leadership and volunteers together.

Our Vestry supervised the execution of a set of activities that ensures we have the resources we need (Stewardship and Budget), engages formally with the Diocese (audits, parochial reports, conventions, etc.). In every instance, volunteers stepped forward to accomplish those important tasks.

Accompanying those formal requirements are an equally important set of activities that serve to take care of St. Luke's keep us connected as a congregation and deepen our understanding of the Bible and our Faith.

Recurring Administrative Requirements

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| <ul style="list-style-type: none">• Parochial report was completed and forwarded to the Diocese• Church financial audit was completed and forwarded to the Diocese• 2024 Stewardship Campaign led by Ashby Kindler | <ul style="list-style-type: none">• Annual Gifting Campaign exercised twice annually, led by Joe Gieck with Ashby Kindler• 2024 Budget Committee led by Bob Lamb with Ben Wham and Ashby Kindler• 229th Annual Convention attended by Fr. Peter and Linda Pitz• Preparation of this Annual Report by Bob Lamb |
|--|--|

- We took special care of our 125+ year old **church and church grounds**. Thankfully, we didn't have any major



issues with the church or our grounds. Weekly cleaning of Church and Parish Hall: Ruby Parrish and Sally Gieck. Our Spring and Fall Cleanups clean-ups continue under the leadership of our Junior Warden Tom Pitz. Under the leadership of Babs and Don Fickes, a major clearing and garden bed construction was undertaken around Berberich Hall. Can't wait for spring to spring and showcase the results. Our organ required an emergency repair in December which thankfully was not extensive.

- We stayed connected. The **communications** ministry consists of several components including our weekly e-newsletter, the *Song of Simeon*, our website, (www.stlukessimeon.org), our increasingly robust FaceBook (47 followers) page which facilitates our

service broadcast. Underpinning these communications means is "Google Group" that facilitates distribution of emails as well as the *Song*. We currently have 95 members, which include former parishioners that have moved or joined other congregations but wish to stay informed. We published an updated 2023 Church Directory as well and will do so again for the upcoming Annual Meeting.

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- Fr. Peter continued weekly **Adult Sunday School and Bible Study** held an hour before Holy Eucharist selecting periods of study such as Lent or Advent along with a particular book of the Bible.
- In November, Lou Lamb and Jan Taylor coordinated refresher training sponsored by the American Heart Association on Cardiopulmonary Resuscitation (CPR) and Automated external defibrillator (AED)
- On top of all that, 2023 brought the resurgence of many of our routine/recurring and special events.



Special Events and Activities

Recurring Activities	Special Events	
<ul style="list-style-type: none"> • Weekly broadcast of Holy Eucharist • Weekly coffee hour following Holy Eucharist • Monthly Vestry Meeting each 2nd Tuesday of the month • Monthly Pot Luck Fellowship. • Adult Sunday School & Bible Study 	<ul style="list-style-type: none"> • January - Annual Meeting • January - Annual Diocesan Convention • March – Lenten Bible Study • July – Summer Outreach/Gifting • July - Annual picnic at the Lambs • October – Annual Fall Festival 	<ul style="list-style-type: none"> • October – Blessing of the Animals • November – Annual Diocesan Convention • November - CPR and AED Class • December – Winter Outreach/Gifting • December – Annual Christmas Party at Wentworth Farm hosted by the Giecks

b. Sharing and Service. Sharing and service have continued to be strong exemplars in fulfilling our mission and manifest themselves through a variety of outreach efforts, all of which are thought of and driven by Parishioners. Some examples include:

- **Luv Mitts Ministry** – Created by parishioner Lydia Kessler, Luv Mitts are cozy fingerless mittens made from repurposed sweaters and embellished with beautiful stitches and buttons. Each stitch and button, has meaning, and each pair is unique. They are given in love to provide comfort and express caring for the recipient. Sometimes recipients are given two pairs, with the instruction to “keep one and pass one on.” To date, Lydia has crafted over 6,000 pair and is now teaching others how to make them in church member workshops! Luv Mitts continue to be shared with people all over the world and was even featured on our local Charlottesville news program.



- **Food Bank** – Periodically through the year, under the leadership of Ashby Kindler for the **Emergency Food Bank** and Babs and Don Fickes for the **Monticello Area Community Action Agency (MACAA)**, St. Luke's brought non-perishable and semi-perishable food for our neighbors in need.

• **Annual Fall Festival** – Ashby Kindler organized our Annual Fall Festival which drew many from across the community and included activities for young people as well as tours of St. Luke's. Going forward, we've proposed applying all financial resources received through the Annual Fall Festival be applied to our planned gifting back to the community. During the 2023 festival, St. Luke's collecting \$889.

- **St. Nicholas Toy Sale** – Although suspended this year, in previous years, St. Luke's participated in *The Schoolhouse Thrift Shop's Toy Sale* by donating toys which are sold at 50% off retail to assist low-income families in buying toys for their children at Christmas. This benefits low-income families and community outreach programs and is supported by the churches of Region XV of the Episcopal church, with proceeds benefiting local charities.
- **Rose Hill Baptist Church** - Through the leadership of Tom Pitz and Fr. Peter we engaged with our neighbors at Rose Hill Baptist Church.



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c. Financial Gifting. A major component of the “sharing and service” component of our mission statement is **Financial Gifting**. Our 2023 Budget programmed \$14,000 for gifting. In the course of managing our budget execution over the course of the year, the Vestry determined that spending was exceeding income and therefore decided to limit our second gifting period would be \$5,000 rather than the \$7,000 budgeted. Ultimately we donated \$13,070 to local charities; almost 13% of our total budget. Add to that, \$8,000 donated to the Diocese, and almost \$1,000 to Rev. Peter’s discretionary fund or almost 22% of our total budget. The table reflects the organizations that benefitted from St. Luke’s gifting program. Later in this report, we have outlined a more fiscally responsive

approach to gifting that will allow the Vestry to make more informed decisions around our ability to meet all of our financial obligations.

Financial Gifting

June Gifting	December Gifting
<ul style="list-style-type: none"> • \$1400 Salvation Army • \$1400 Love, INC, • \$1400 B.U.C.K Squad (Brothers United to Cease the Killing) whose focus is reducing gun violence • \$1400 Blue Ridge Food Bank • \$1400 Back to School Bash provides backpacks to school kids 	<ul style="list-style-type: none"> • \$1,333.00 Love INC • \$1,333.00 Salvation Army • \$1,333.00 Santa Fund <p><i>Note: the Vestry decided to reduce December gifting to \$5,000 reflecting the growing gap between income and expenses</i></p>

3. Stewardship.

a. Introduction. This final section places our gifting in context of our overall financial status both for 2023 and looking forward to 2024. The three components of our finances include (1) Investments, (2) Income and overall expenses, and (3) Detained budget execution for the year just concluding and next year’s budget.

Ashby Kindler led the Stewardship effort again this year assisted by Bob Lamb. The Budget Committee included Bob Lamb, Ben Wham, and Ashby Kindler.

b. Investments. The **Investments** table presents the status of our investments over the past three years. It details our investments across three investment funds; one with Ameritrade and two with the Trustees of the Fund (TOTF), the Diocese of Virginia and Julia Macon. We’ve made the decision to reinvest these funds and will continue to do so for the coming year. While 2023 had modest improvement over 2022 it has not recovered to the levels of 2021.

The following are some observations regarding our Investments

- Our investments did slightly better in 2023 (2.7% growth) but have not returned to 2021 levels.
- A more detailed examination of our investments is ongoing.
- Investments remain. “untouched;” we have not leveraged the principals or capital gains to meet our financial obligations and are not calculated as income in our budget development.

c. Income. The **Pledges, Total Budget and Expenses** table presents relevant data around our income (pledges and overall which includes plate offerings), and at a high level what we budgeted and how well we did

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against that budget with our expenses. (Note, the details of our budget execution are subsequently detailed in the next section).

Investments					
Year	Checking/ Savings	Trustees of the Fund		Investments Total (less Checking)	Total Assets
		Diocese of Virginia	Julia Macon		
2021	\$35,797	\$191,089	\$31,785	\$564,421	\$600,218
2022 (1)	\$32,884	\$160,416	\$26,683	\$485,785	\$518,669
2023 (2)	\$41,660	\$177,491	\$29,523	\$548,765	\$590,425

(1) as of January 9, 2023 (2) as of December 31, 2023

The following are some observations regarding our income:

- The average number of pledges is approximately 30. Those pledges average \$85,100 annually.
- The annual total income averages \$94,600 up through 2022. The plate offering averages approximately \$8000.
- The 2023 budget of \$107k exceeded pledges by over \$20k.
- 2023 expenses will likely exceed income.
- The 2024 budget is significantly lower than previous years based on a proposed new approach to gifting.
- ***We have not spent more than budgeted, but have spent more than received for the past four years in a row.***

Income - Pledges, Total Budget and Expenses

Year	# of Pledges	Amount of Pledges	Total Income (1)	Planned Budget	Expended
2019	31	\$94,454	\$109,003	\$120,114	\$108,209
2020	29	\$77,900	\$85,540	\$102,450	\$98,993
2021	32	\$82,472	\$90,689	\$99,725	\$96,979
2022	30	\$85,216	\$93,281	\$103,240	\$95,502
2023 (2)	27	\$85,430	\$94,390	\$107,405	\$98,231
2024	28	89,852		\$95,533	

(1) Total income includes funds received from pledges, plate offerings as well as other income (e.g., Fall Festival)
 (2) as of December 31, 2023

d. Expenses. Where the previous section detailed our overall income and expenses against budget, this section presents the details of our 2023 budget execution by category which in turn forms the foundation for our 2024 Budget going forward.

The following are observations and conclusions around our 2023 expenses and 2024 budget.

- The total budget for 2024 is approximately \$12k less than 2023. This is primarily due to a different approach to “Outreach / Gifting.”
- With the exception of “Outreach / Gifting” minor adjustments only have been made
- The Budget Committee and Vestry recognized that Fr. Peter’s contract will require renewal this year.

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As a result of exceeding our income over the past several years, the Budget Committee proposed a new approach to our gifting based on the following.

- Shift to one gifting period annually in December which would allow better understanding of our financial health for that year.

2023 Budget Execution & 2024 Budget				
Item	2023 Budget (\$)	2023 Actual	2024 Budget (\$)	2024 Notes
Building & Grounds				
-Building Maint	\$ 1,000.00	\$ 755.23	\$ 1,000.00	No change
-Build/Mech Impr.	\$ 2,500.00	\$ -	\$ 2,500.00	No change; emergency repairs and improvements
-Gas and Electric	\$ 5,000.00	\$ 3,124.11	\$ 4,000.00	Reduced by \$1000; needs to be monitored
-Grounds Maint.	\$ 2,000.00	\$ 1,701.40	\$ 2,000.00	Mowing, tree trimming, etc.
Total	\$ 10,500.00	\$ 5,580.74	\$ 9,500.00	Build & Grounds
Outreach				
-Diocesan Giving	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	8 - 10% of plate and pledge estimates
-Discretionary Fund	\$ 750.00	\$ 1,507.54	\$ 1,000.00	Raised by \$250
-Outreach / Gifting	\$ 14,000.00	\$ 13,071.00		See comments below
-C'Ville Region Due	\$ 850.00	\$ 850.00	\$ 500.00	
-Restricted Gifting	\$ -	\$ -	\$ -	Aligned to "Restricted Gifts" under Income.
Total Outreach	\$ 23,600.00	\$ 23,428.54	\$ 9,500.00	
Parish Operations				
-Advert/Comms.	\$ 250.00	\$ 196.00	\$ 250.00	Raised by \$125. (e.g. banners)
-Altar/Liturgical	\$ 1,000.00	\$ 255.20	\$ 750.00	Reduced by \$250 after looking back 5 years
-Books & Subscript.	\$ 150.00		\$ 150.00	
-Congreg. Life	\$ 1,000.00	\$ 1,770.30	\$ 1,200.00	Increased by \$200 based on 2023 expenses
-Disc. Council Meet.	\$ 1,300.00	\$ 180.51	\$ 1,300.00	Occurs 3rd week of Nov.
-Dues & Member				This is a new budget category.
-Flowers	\$ 500.00	\$ 923.76	\$ 500.00	
-Internet Web Site	\$ 100.00	\$ 290.80	\$ 125.00	Website maint. (approx & domain name)
-Liability Insurance	\$ 3,000.00	\$ 2,768.00	\$ 3,000.00	2023: Increased by \$300 for Worker's Comp.
-Miles (Spply Clgy)	\$ 250.00	\$ 325.00	\$ 1,000.00	Anticipated requirements
-Office Supplies	\$ 1,500.00	\$ 1,392.22	\$ 1,500.00	
-Post & Delivery	\$ 250.00	\$ 176.00	\$ 250.00	
-Tel. & Internet	\$ 1,700.00	\$ 2,080.33	\$ 2,000.00	2024: Increased by \$300 to reflect higher billing rate
Total Parish Opr.	\$ 11,000.00	\$ 10,358.12	\$ 12,025.00	
Salaries & Expenses				
-Account Services	\$ 1,500.00	\$ 1,500.00	\$ 1,800.00	2024: Increased by \$5/hr = \$300 over 2023
-FICA/Medicare			\$ 100.00	2024: required for Bookkeeper
-Medical Insurance	\$ 6,292.00	\$ 2,494.07	\$ 6,292.00	\$840 annual cost for insurance and pay the deductible up to \$5452
-Payroll Service	\$ 800.00	\$ 834.22	\$ 800.00	Reduced by \$200. ADP
-Salary - Comp	\$ 16,785.30	\$ 17,605.60	\$ 17,401.32	2024: Diocese recommend COLA 3.67%
-Salary - Cont Ed	\$ 1,400.00	\$ -	\$ 1,400.00	Reflects previous annual budget;
-Salary - Housing	\$ 16,785.30	\$ 16,785.00	\$ 17,401.32	2024: Diocese recommend COLA 3.67%
-Salary - Pension	\$ 6,242.00	\$ 6,041.32	\$ 6,471.08	2024: Diocese recommend COLA 3.67%
-Salary - SECA	\$ 2,500.00	\$ 2,445.84	\$ 2,662.35	2024: Increased based on COLA increases
-Salary- Organist	\$ 8,000.00	\$ 7,965.00	\$ 8,000.00	52 services; 4 special services; 4 supply services
-Supply Clergy	\$ 2,000.00	\$ 1,142.00	\$ 2,200.00	2024: 10 Services \$220/service
Total Sal & Exp.	\$ 62,304.60	\$ 56,813.05	\$ 64,528.07	
Total Budget	\$ 107,404.60	\$ 96,180.45	\$ 95,553.07	

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- Not budgeting a specific amount but rather estimating available funds from on hand resources in December. If budget surpluses are found in January / February as we close our books from the previous year, those resources, upon approval of the Vestry be applied to December gifting. This may facilitate larger gifts.
- That congregants continue to make recommendations and the Gifting Committee base recommendations for both recipients and amounts based on estimated availability of funds in December.
- Further, that congregants be encouraged to contribute additional plate donations (i.e., “restricted funds”) as offering specifically targeted for that gifting period above their pledge amounts. Annotating checks accordingly throughout November or even longer would allow Ashby to calculate the total amount available for gifting.
- Applying resources received through the Annual Fall Festival directly into our gifting for the year. For example, this year that would contribute \$889.

Final note on **Gifting**. Last year the Budget Committee, identified a similar budget shortfall, identified options for changing our approach to funding our gifting and did so again in 2023. Gifting remains the largest single component of our budget that is not a bill or financial obligation. There is clearly a strong argument for using our investments to fulfill our budget shortfalls and/or supplement our gifting. Ultimately, we may need to do so. The hope is the proposed approach outlined herein may in fact provide for both; fulfilling our gifting aspirations and remaining good stewards of St. Luke's resources.

4. Conclusion

At the outset of this Annual Report we presented our mission and used it as a guide for this report. As we look back on 2023, we are indeed a *Spirit-filled community* and in fact we are a growing one. Last year our Annual Report described the sense of returning to “normalcy” and even suggested our pews seemed fuller. The fact is they are fuller; we have grown. Not many churches are able to say that. One might ask how can a “little white church with the red roof on the corner” be growing. One possible answer comes from Linda Pitz, who has graciously taken on the role of introducing the congregation to one another through the “Congregational Corner” in the Song of Simeon. A consistent comment from those interviewed was the warm welcome they felt upon entering St. Luke's. How many of us have had that same sense when we first arrived?

We have *proclaimed Christ's love* for one another and our neighbors. Consider how much we do throughout the year, from Bible Study, to CPR classes, a Fall Festival, picnics, pot lucks, Christmas open houses, and so much more. More importantly we've *shared and served* as we helped our neighbors with gifts of our time, talents, and treasure. We've engaged with and helped our community. We are the little church that could and does.

As we began, let's close this 2023 Annual Report with our Mission.

*We are a Spirit-filled community of simple grace and acceptance
Where all are embraced as children of God.*

*We proclaim Christ's love for the world in Word and Sacrament, food and fellowship, sharing
and service.*

Come As You Are!