

St. Mary's Episcopal Church

2023 Annual Report



St. Mary's Mission Statement

St. Mary's is a Christian community of all ages grounded in worship, well-being, and service.

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Staff

The Reverend Jennifer Pedrick, *Rector* ~ The Reverend Meaghan Brower, *Associate Rector*
Karen Laroche, *Parish Administrator* ~ Jon Walker, *Property Manager*

Rector's Report

*But those who wait for the Lord shall renew their strength,
they shall mount up with wings like eagles, they shall run
and not be weary,
they shall walk and not faint.*

Isaiah 40:31

This annual report contains many concrete examples of faith filled ministry and strength at St. Mary's. In 2023 we lived through significant changes together. I am grateful for our members, friends, leaders, and staff. While some of our members have lived through difficult transitions, these sorrows have been met with compassion. All changes have required coming together, being flexible, pacing ourselves, and practicing generosity. We have taken great care of people, financial resources and property. We have walked together keeping worship, spiritual nourishment, and hospitality at the center of our ministry. God was our pace setter, and we did a good job of accomplishing the ministry before us. As the prophet Isaiah wrote, "those who wait for the Lord, shall renew their strength."

We experienced changes in our staff. Michael Templeton completed his vibrant ministry at Easter. This began a time of transition that continues into 2024 as we continue to seek a new music director. We have not missed a beat in continuing our discernment and worship through it all. We sing. We are listening. God is renewing us through music. In June, we welcomed the Rev. Meaghan Brower after a long period of discernment. This has been a gift to all of us, and especially to me. I am thankful beyond words to share ministry with Meaghan. As a church, we can all look forward to what God will accomplish in our life together.

Our property is being recognized, and we are sharing it with new communities. In September, we welcomed the Choir School of Newport County. This group meets weekly in our Parish House for rehearsals and meals. Once every two months they offer music in our primary weekend service. After a period of discernment, we have welcomed Looking Upwards, as tenants in Gibbs House. They are using the building as their art studio for special needs adults. The presence of these two organizations brings

creative energy and joy to our campus. This aligns beautifully with our mission. In 2023 we received a "Rhody Prize" from the Rhode Island Preservation foundation for our restoration of the historic church. We were also added to the National Registry of Historic Places. These distinctions are the result of our stewardship and invite others to experience the beauty and grace of our property.

We are deepening our relationship with God and our neighbors. There are many new faces and voices in worship and programs. We welcomed nearly thirty new members in October and there are many more who are with us on a weekly basis. Our Easter and Christmas services were standing room only. We have had large funerals and nearly thirty burials in 2023. Our "Rest and Play" events were another source of welcoming our neighbors to St. Mary's. Some of our guests have returned on a regular basis and joined our church. We will be adding a second welcome weekend to our annual calendar, welcoming new members twice each year. God is renewing us as we offer hospitality.

I am grateful. Last week I celebrated the twenty-fifth anniversary of my ordination to the priesthood. In April of 2024, I will celebrate my tenth anniversary as the rector of St. Mary's. I appreciate the staff and leaders, the members and guests who make up this church. God uses us in so many ways to share love and light. I am grateful to continue this call to serve with you and to wait on the Holy One - to renew our strength, to nourish our souls and to grow this church.



*Faithfully,
Jennifer+*

Associate Rector's Report

This week marks the beginning of my eighth month as your Associate Rector here at St. Mary's.

While I had deep affection for St. Mary's before I started here, I find the more I know about this church's ministry, the more love and respect I have for the people who make that ministry happen. Each day in this job I have learned something new, profound, and delightful about how people love God and one another in this place.

While I trust I am not telling you anything you don't already know, I'd like to share some of what I have learned about St. Mary's over this past eight months.

- **The warm welcome you provide here is authentic and real.** This is a welcoming church because the people here have a deep understanding that we are better when we are together, and that any person that steps onto this property might be able to give us a greater understanding of God, and a new opportunity to love.
- **Every person in this place is trusted to do God's work and the work of the parish.** Rarely have I seen a church with such strong leadership in every area. While I can see that clergy leadership is important to you, you do not depend solely on the clergy to get things done. In fact, on several occasions when I have offered to help I have been lovingly dismissed by people saying, "You have other things to do - we've got this." It is refreshing, and this church is blessed by the myriad of skills, talents, and love shared generously by her members and friends.
- **You are not afraid to try new things and you know how to have a good time.** If our Summer

of Rest and Play taught me anything, it's that the people of this church will show up and find joy in whatever it is we do together: playing corn hole, picking strawberries, Beach Dinner, dancing on the lawn at the concerts, skits as sermons, and painting the windows of the Chapel. Creativity thrives here, and I think it helps us to have a more expansive experience of God.

- **God is at the center of everything we do here.** I know this one should seem obvious; this is a church after all. But it is entirely possible that in our human frailty we can lose sight of God even when the purpose of our work is to worship and serve God. Despite ongoing challenges posed by the outside world, this congregation has listened faithfully and intentionally for God in every action and every decision. It is beautiful to behold.

With these truths about St. Mary's in mind, I am eagerly looking forward to 2024 and the ministry that God will call us to do together.

*Gratefully,
Meaghan*



2024 Annual Meeting of the Corporation

Agenda

- Call to order and Invocation– The Rev’d Jennifer Pedrick, Rector
- Determination of a Quorum – Mattie Gustafson, Clerk
- Acceptance of the minutes of the 2023 annual meeting
- Acceptance of 2023 annual reports by title as published
- Acknowledgement and gratitude for retiring and other leaders - Jennifer Pedrick
- Nominating Committee Report and Elections – Marlo Pratt, Chairperson of the Nominating Committee
- Financial and Investment Report for 2022 – Richard Updegrove, vestry member and Senior Warden nominee, for David Brierley, Treasurer
- Budget for 2023 – Richard Updegrove for David Brierley
- Closing Prayer and Adjournment – Jennifer Pedrick

From the Bylaws of St. Mary’s Church, Portsmouth

St. Mary’s Vital Statistics 2023

Baptisms	1
Confirmations	4
Receptions	0
New Members	27
Deaths of Members	4
Active Membership	328
Burials/Funerals	27

Minutes of the 2023 Meeting of the Corporation of St. Mary's

Sunday, February 5, 2023

St. George's Chapel and streaming on *Facebook Live and Zoom*

The Rector, the Rev. Jennifer Pedrick, called the 2023 Annual Meeting of St. Mary's Corporation to order at 10:32 a.m. She thanked everyone who made this meeting possible, Murry Edwards, for once again putting together a wonderful Annual Report, and all those who submitted information and reports.

The Rector then offered a prayer.

Mattie Gustafson, Parish Clerk, confirmed that a quorum was present. (21 members are required for a quorum.)

- A motion was made and seconded to accept the minutes from the 2022 Annual Meeting, held on Sunday, February 6, 2022. The motion was passed.
- A motion was made and seconded to accept the minutes from the Special Meeting of the Corporation, held on Sunday, March 13, 2022. The motion passed.
- A motion was made and seconded to accept the *2022 Annual Report* and its contents, excluding the report from the Nominating Committee, the Financial Report and the Proposed 2023 Annual Budget. The motion passed.

Acknowledgment and Gratitude for Retiring Vestry and Other Leaders

Matt Spohn has served St. Mary's for three years on the Vestry. He has been incredibly supportive in setting up for our outdoor worship – coming early and staying late many Sundays to work with John Walker. Matt has also served on the Property Team and has been a great help in maintaining our buildings and grounds. Matt is one of the people who literally helps our lights to shine, as he, along with Marlo and Jon, put up our white Advent lights. Thank you, Matt, for your service and hard work.

Peter Collins has served on the Vestry for six years. He has great management insight and skill, has served on the Executive Committee and has helped us navigate several organizational and financial hurdles. He also led the funding effort for the first two phases of the restoration of the historic church. Thank you, Peter, for your skill and service.

Julie Zecher served for three years on the Vestry. Julie has brought an inspiring perspective to the Vestry. She is often the person at the table who speaks of God's presence or our need for the Spirit's wisdom. She has reminded us that we are stewards of what she calls "the heart space of Aquidneck Island." Thank you, Julie, for holding a heart space on our Vestry.

Carole Nicodemus has served as a Lay Eucharistic Minister for thirty years, starting at St. George's and serving here at St. Mary's for the last 12 years. She has been the leader of the LEMs while I have been here as rector. It has been a blessing for me to serve with you at God's table. Thank you, Carole!

Fleur de lis Award

From time to time the *fleur de lis* award is given by the Rector of St. Mary's to a member whose service and ministry has been extraordinary. This year I am recognizing Murry Edwards. Two years ago, Murry retired as Senior Warden, but what she has accomplished since that retirement has been incredible.

- She continues to serve tirelessly and creatively on the Invite, Welcome Connect team.
- She is a lead in the collation ministry.
- She is the coordinator of greeters.
- Every week she creates and edits the electronic newsletter.
- She is responsible for the beautiful annual report you have in your hand.
- As we have turned our attention to welcoming children and their families, she has prepared worship kits for kids on a weekly basis as well as hosting events for families.
- Murry takes communion to members who are homebound and in nursing homes.
- She lives our mission, worshiping, serving and supporting the well-being of individuals and our community as a whole.
- She is a wise and supportive sister in Christ, to me and to many of us. Thank you, Murry. We thank God for you.

Thank you to the Vestry

Thank you to the officers of the Vestry, Marlo Pratt, Sr. Warden, George LeBlanc, Jr. Warden, David Brierley, our treasurer, and Mattie Gustafson, who has agreed to serve another three-year term as clerk of the vestry. Thanks to the remaining members of the vestry (are listed on page 9 of the Annual Report).

Thank you to Staff

Thanks to Jon Walker property manager, Karen Laroche, parish administrator and, Michael Templeton, pastoral musician. Thank you, also, to David Warfield who has been playing our new organ since we returned to the historic church.

Thank you to Commission Chairs and other leaders in 2023

Rita Verespy and Christine Winslow who lead the Stewardship Commission,

Jeff Belden, Sarah Gibbs Trust

Pauline Davis, Pastoral Care Commission

Lynn Carlson LeBlanc, Community Outreach

All who lead worship, administrative and outreach ministries.

Mattie Gustafson and Murry Edwards for keeping our web page up to date as a welcoming tool.

And thank you, one more time to Ron Machtley, the chief of restoration, whose leadership in 2022 made all the difference in getting us back into the historic church.

Nominating Committee Report

Chris Winslow, Chair of the Nominating Committee, thanked her team – Peter Collins, Matt Spohn and Julie Zecher - and presented the slate of nominations for the coming year.

For Officers -

Mattie Gustafson – for a 3-year term as Clerk, ending in 2026.

For Vestry –

Vestry – 3-year terms, ending in 2026: Cory Thurston Lallo, Lauren Lema, Alex Simmons

For Delegates to Diocesan Convention –

- As delegates: John Corbishley and David Ferkinhoff
- As alternates: Harry and Mattie Gustafson

No nominations from the floor were forthcoming. A motion was made and seconded to close the nominations. Motion passed. A motion was made and seconded to cast one vote for the entire slate of nominees. Motion passed.

Financial Report and 2023 Proposed Budget

David Brierley presented a short overview of the Financial Report. (Please see page 17 in the Annual Report for details.)

Endowments draws were exactly on budget, representing approximately a 5.7% draw for the year.

A motion was made and seconded to accept the 2022 Financial Report. The motion passed.

Then Dave presented highlights from the proposed Budget for 2023 (see page 18 in the *2021 Annual Report*).

After several questions and answers, a motion was made and seconded to accept the Proposed Budget for 2023. Motion passed.

Jennifer offered a closing prayer, and the meeting adjourned at 11:10 a.m.

Respectfully submitted,

Mattie Gustafson, Clerk

2023 Officers of the Corporation and Members of the Vestry

Marlo Pratt, Sr. Warden, 2024
George LeBlanc, Jr. Warden, 2024
David Brierley, Treasurer, 2024
Mattie Gustafson, Clerk, 2026

Class of 2024: Anne Wood, Lee Ferreira,
Richard Updegrove

Class of 2025: John Corbishley, Rita Verespy

Class of 2026: Cory Thurston, Lauren Lema,
Alex Simmons

2024 Nominating Committee

For a 3-year term as senior warden ending in 2027:
Richard Updegrove

For a 3-year term as junior warden ending in 2027:
John Corbishley

For a 3-year term as treasurer ending in 2027:
David Brierley

For a 1-year term on the vestry ending in 2025: Jerry
Culver, Anne Wood

For a 3-year term on the vestry ending in 2027: Sarah
Barker, David Burke, Jason DeFalco

For diocesan convention for 2024,
as delegates: Carol Brierley, David Brierley
as alternates: Harry Gustafson, Mattie Gustafson

*Committee: David Brierley, Lee Ferreira, George LeBlanc,
Marlo Pratt (chair), Richard Updegrove, Julie Zecher*



Work of the Vestry 2023

This outlines major votes of the vestry in 2023. It does not include administrative or pro forma votes for 2023.

Special Meeting February 23, 2023

Approved the Rector's selection of Meaghan Brower for Associate Rector. Meaghan will begin work at St. Mary's on June 1, 2023.

Approved acceptance of \$40,000 in restricted gifts from 2 anonymous parishioners and the addition of this \$40,000 to the 2023 Budget to cover the Associate Rector's salary for June through September 2023. This is an earlier start than originally anticipated.

February 25, 2023

Approved the Parochial Report for 2022.

March 30, 2023

Appointed the following to St. Mary's Investment Committee for 2023: Chris Bartlett, chair; Jeff Belden, Ted Bierman, Edye DeMarco, David Burke, and David Brierley, treasurer, member *ex officio*.

Appointed Cory Thurston as the newest Vestry member of the Sara Gibbs Trustees. The Vestry Trustees are David Brierley (term expiring 2024), John Corbishley (2025), and Cory Thurston (2026).

April 27, 2023

Passed a motion to lease 20 parking spaces to Island Day Care. It was agreed that the lease should ensure that Island Day Care is responsible for all necessary repairs and maintenance.

May 25, 2023

Accepted an anonymous bequest, and will, at the appropriate time, establish an endowment fund, which funds will be used exclusively for repairs and improvements to the property at St. Mary's Episcopal Church.

A second motion was passed to ensure that the Rector maintain a confidential file containing details of this bequest, which will be released upon vestry approval.

June 22, 2023

Approved the housing allowance for the Associate Rector, Meaghan Brower.

September 28, 2023

Gave Jennifer Pedrick authority to sign a rental agreement for Gibbs House.

October 26, 2023

Decided not to move ahead with a transportation ministry.

Created a new vestry position designated as the Assistant Treasurer. This position will be filled by an existing vestry member so it will not increase the size of the vestry. This person will work with the Treasurer to become familiar with the procedures and reports related to finances. This person will be authorized to sign checks in the absence of the Treasurer. For any checks which are over \$1,000 and therefore require two signatures, one of the signatures must be either the junior or senior warden.

Moved to replace the community garden posts, gate and fencing in the Fall 2023 & Winter 2024.

November 16, 2023

Accepted a gift from a former member for the renovation of the kitchen in the rectory, according to the terms of the donor's letter dated October 2, 2023.

December 14, 2023

Accepted the proposed Budget for 2024.

Approved the annual housing allowance for the Rector and the Associate Rector.

Senior Warden's Report

When I sat down this year to write my final Sr. Warden 'sReport, I was a bit surprised to discover that I felt a bit of sadness in my heart.

It has been my sincere honor and a true pleasure to serve as your Sr. Warden these past three years. As I reflect on my time as Sr. Warden, I find my heart filled with joy remembering all the wonderful times as well as the many challenges we confronted together. What brought me the greatest joy is to have seen St. Mary's grow in so many ways. I began my Sr. Warden position during the Pandemic—a truly terrifying time for us all due to the countless unknowns. Despite these unknowns we came together as a church with open hearts and minds. Coming together with open hearts and minds allowed our St. Mary's community to flourish. The common phrase heard in the Vestry at this time was, "We have never done it this way before, but let's try." With this spirit of open mindedness and an overwhelmingly positive attitude our community was able to think outside the box to meet the needs of our community. At a time of great strife this enabled our church to persevere.

We developed a new ministry called Technology/AV. This ministry provided a new and innovative way for our members to attend church during a time of social distancing. By sharing our services online we were able to expand our reach while continuing to convey the good news of Jesus Christ. While other churches were struggling with attendance, we here at St. Mary's were growing. I am proud to say we have welcomed 71 new members to our community during this time—a

testament to the incredible warmth and spiritual nurturing we have all found here at St. Mary's.

Last year I asked a 'favor' of you. I invited you to focus on deepening your spiritual growth, expanding our ministries, and continuing our community outreach. Our church answered the call. This year I ask you to be "a part" of St. Mary's by sharing your gifts and joining a ministry. The friendships you will make and the spiritual fulfillment you will experience by serving your church will be life changing. It surely has been for me!

As I pass the mantle of Sr. Warden I remain optimistic and eagerly look forward to my next adventure at St. Mary's. I may take a few months before jumping into my next "calling," but you will surely see me around.

Thank you again for your service, support and generosity over the years. It was greatly appreciated!

Faithfully,
Marlo Pratt, Senior Warden



Property Commission

Overseeing the **strategic maintenance** of St. Mary's property and responding to unplanned needs, the Property Commission is responsible for the stewardship of 21% of the annual budget. This allows St. Mary's to provide a safe and welcoming environment both indoors and out for members and guests.

A **new air conditioning system** was installed in the Gibbs House after the old system failed. In addition the **road/walkway** in front and around the side of the Gibbs House was **paved to improve safety and snow plowing**.

To protect the newly restored Historic Church, a generous parishioner donated the funds to install **lightning rods on the steeple and along the peak of the church**. In addition we installed a **hard-wired connection between fire alarm system and the electronic monitoring system** to make them more failsafe. These initiatives will help to ensure that future generations will continue to enjoy this historic place of worship.

In keeping with our goal to maintain and beautify the grounds, we **treated our 13 beech trees to try to eradicate the beech leaf disease**, which has invaded Aquidneck Island. We also treated the most significant of these trees for black mold. Left untreated these large and majestic trees will die. In addition we removed 2 dead trees in the cemetery area and planted a new magnolia tree in front of the rectory. As part of an on-going project we also filled in divots and depressions in the cemetery yard and on the South lawn in front of the Worship Shell to improve walking safety.

A **new water bottle filling station** was installed in the gathering space of the Parish House in support of the

diocesan Creation Care Initiative. This was paired with new water bottles offered to parishioners by the Community Outreach Team, enabling St. Mary's to discontinue use of plastic bottles.

Late in the year we **secured approval to rebuild the enclosure around the Community Garden**. The current posts, fence and gate are nearing the end of their useful lives. Work began in December and will be completed before the 2024 spring planting season. The new enclosure will utilize cedar posts with galvanized fencing and deer netting at the base to prevent animals from entering. This will enable St. Mary's many gardeners to continue growing produce for themselves as well as for donation to local food banks.

Finally, we had a successful Fall Property day with numerous parishioners working on 6 projects including cleaning a historic gravestone, clearing the Community Garden, putting up Christmas decorations, cleaning the Historic Church, organizing Christian formation materials, and cleaning the windows in St. George's Chapel.

The spirit of giving continues to be strong at St. Mary's!

*Respectfully submitted,
George LeBlanc, Junior Warden*



2023 Financial and Investment Reports

INCOME:

Over a year ago, when we were creating the budget for 2023, we anticipated a shortfall in income due to an anticipated increase in expenses related to bringing on a second priest later in the year. Since we had experienced a surplus in previous years the vestry voted to allocate a portion of that surplus to balance the budget for 2023. Thanks to the generosity of our parishioners and added income from the sale of grave-lots and administrative fees for burials, we did not need to use any of the surplus funds that we had budgeted. This means that this money is still available to us for future projects. As we have done in the past, we will use this money to provide funding for major improvement projects and to provide a cushion in the event that it is needed.

EXPENSES:

On the expense side of the budget for 2023, things looked very close to what we predicted them to be. A few categories came in slightly over budget and a few categories came in under budget, with a net result of expenses coming in approximately \$19,000 over budget for the year. However, when combined with the strong performance on the income, this results in a net positive income of \$14,773, which will be added to our Reserve/Surplus fund.

ENDOWMENT:

The financial markets recovered nicely from their very challenging 2022 performance, with both stocks and bonds providing positive returns in 2023. This was reflected in our endowment performance, which ended the year up approximately 14.56%. Endowment draws were exactly on budget at \$211,176, representing an approximately 6.3% draw for the year.

The Investment Committee met quarterly with the investment manager (Van Liew Capital) to review strategy, holdings and performance. There were no changes to the portfolio allocation, which continues to have an equity target between 60-70%. We continue to hold approximately 1 year of future draws in a conservative bond fund, which ensures that we would not need to liquidate investments during bearish conditions should the current poor market conditions persist.

LOOKING FORWARD - 2024 AND BEYOND:

These financial results in the face of another challenging year are an incredible testament to the strength of our community.

During the budget setting process the vestry discussed the funding challenges of having an assistant priest for a full year in 2024 and how we would go about funding that position. During 2023 we received unrestricted miscellaneous donations totaling \$30,000 which we decided we would set aside for use in 2024. In the 2024 budget you will see an item labeled "Other Income" in the amount of \$101,087. This line item consists of the \$30,000 in unrestricted gifts from 2023, \$7,600 from previous years surplus which will be used for major improvement projects, an additional \$35,000 from previous years surplus to balance the budget, an expected income of approximately \$6,000 in recoverable depreciation costs from an insurance claim that we filed back in 2017, plus a potential additional withdrawal from the endowment of up to \$28,487 if it is required. It is my hope that the continued generosity of our parishioners will result in eliminating the need for both the \$35,000 from the Reserve/Surplus fund as well as the potential addition withdrawal from the endowment.

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*Respectfully yours,
David Brierley, Treasurer*

Restricted Funds

ST. MARY'S CHURCH ANNUAL MEETING TREASURER'S REPORT (1/31/2024) RESTRICTED FUNDS

INCOME AND EXPENDITURES

Donations / Income:

	<u>2023</u>	<u>2022</u>
Altar Guild	\$ 0	\$ 0
Churchyard & Grounds	\$ 690	\$ 250
Community Garden	\$ 0	\$ 0
Grounds & Parking Lots	\$ 0	\$ 0
Historic Church	\$ 91,666	\$ 332,518
New Parish House	\$ 0	\$ 0
Other	\$ 45,147	\$ 48,719
Tuck Fund	\$ 20,000	\$ 41,000
Reserve for next year	\$ 30,000	\$ 0
Prior Year Restricted Gifts Released		
Historic Church	\$ 0	\$ 0
Organ	\$ 0	\$ 0
	<u>\$ 187,503</u>	<u>\$ 422,487</u>

Expenditures:

Churchyard & Grounds	\$ 21,240	\$ 7,660
Community Garden	\$ 5,757	\$ 0
Grounds & Parking Lots	\$ 0	\$ 0
Historic Church	\$ 4,380	\$ 880,779
Other	\$ 16,425	\$ 6,239
Gibbs House	\$ 7,132	\$ 0
Tuck Scholarship Awards	\$ 34,000	\$ 41,000
Prior Year Restricted Gifts Expended		
Historic Church	\$ 0	\$ 0
Organ	\$ 0	\$ 0
	<u>\$ 88,934</u>	<u>\$ 935,678</u>

NET RESTRICTED INCOME LESS EXPENDITURES

<u>\$ 98,569</u>	<u>-\$ 513,192</u>
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Budgets for 2023 and 2024

ST. MARY'S CHURCH ANNUAL MEETING TREASURER'S REPORT (1/31/2024) GENERAL AND RESTRICTED FUNDS

INCOME STATEMENTS

	Budget 2024		Budget 2023		Actual 2023		Actual 2022	
Income:								
Pledges	\$300,000	41%	\$270,000	43%	\$276,443	42%	\$260,450	44%
Loose Offerings	\$12,000	2%	\$10,000	2%	\$26,029	4%	\$19,874	3%
Donations	\$11,000	2%	\$10,000	2%	\$48,259	7%	\$5,464	1%
Investment Income & Draw	\$221,216	30%	\$221,212	35%	\$221,468	34%	\$221,468	37%
Buildings & Land Use	\$68,100	9%	\$48,700	8%	\$70,362	11%	\$66,014	11%
Fundraising/Other	\$17,000	2%	\$12,000	2%	\$8,093	1%	\$21,003	4%
Other Income	\$101,087	14%	\$51,504	8%	\$1,072	0%	\$0	0%
Total Income	\$730,403	100%	\$623,416	100%	\$651,727	100%	\$594,273	100%
Expenditures:								
Personnel(ex. Sexton)	\$450,000	62%	\$352,130	56%	\$373,008	59%	\$307,564	50%
Apportionment	\$78,553	11%	\$77,836	12%	\$77,836	12%	\$68,662	11%
Grounds(incl. Sexton)	\$19,000	3%	\$19,700	3%	\$11,523	2%	\$11,634	2%
Buildings & Utilities	\$103,100	14%	\$93,500	15%	\$91,034	14%	\$83,280	13%
B&G Major Projects	0		13300		\$0	0%	\$65,109	10%
Office	\$61,100	8%	\$52,800	8%	\$66,401	10%	\$61,232	0%
Outreach	\$4,500	1%	\$3,500	1%	\$6,347	1%	\$1,423	
Stewardship, Christian								3%
Formation, Music, Worship	\$14,150	2%	\$10,650	2%	\$10,805	2%	\$19,950	100%
Total Expenditures	\$730,403	100%	\$623,416	100%	\$636,953	100%	\$618,854	
Net Operating Excess,(Deficit)	\$0		\$0		\$14,773		-\$24,581	

BALANCE SHEETS

	12/31/2023	12/31/2022
Assets:		
Cash in Bank	\$176,599	\$61,257
Investments - Endowment	\$3,932,407	\$3,658,444
Cash - Oliphant Proceeds	\$0	\$0
Diocesan Investment Trust	\$255,651	\$255,651
HC Restoration Fund	\$113	\$108
Other Assets	\$10,094	\$9,794
Total Assets	\$4,374,864	\$3,985,253

PLEDGE HISTORY

	Pledged		Received		%
	\$	#	\$		
2023	\$264,961	103	\$276,443		104%
2022	\$261,444	112	\$260,450		100%
2021	\$251,334	110	\$270,954		108%
2020	\$259,834	120	\$256,347		99%
2019	\$265,050	123	\$280,277		106%
2018	\$218,112	113	\$231,980		106%
2017	\$232,138	126	\$242,329		104%
2016	\$220,372	125	\$218,124		99%
2015	\$227,156	133	\$220,381		97%
2014	\$197,921	134	\$202,510		102%



Narrative Budget

Welcome to St. Mary's 2024 narrative budget, a story of how we live into our mission as a "Christian community of all ages, grounded in worship, well-being, and service."

Funding our Budget

We have four major sources of income:

- pledges,
- funds from facilities' use by other organizations and from the sale of grave lots in our churchyard,
- the interest we earn on our endowments as well as a small draw on the endowment, and
- a smaller amount that comes from loose offerings in the plate and other miscellaneous sources of income.

Allocating our Budget

We have four major areas of expenses that are well-aligned with our mission.

- Worship receives 31% of our expenses.
- Well-Being is 20% of our expenses.
- Service accounts for 22%.
- 27% of our budget is allocated to facilities - our buildings and land.

*Please note that personnel expenses (\$445K) and administrative costs (\$170K) are allocated proportionally to each ministry.

As you read the following ministry reports, you will witness the work that St. Mary's budget enables us to do. As you read the following ministry reports, you will witness the work that St. Mary's budget enables us to do.



Worship, Well-Being and Service: A View from the Pew

A senior at Sacred Heart University, Rayna Lombardo came to St. Mary's with her grandmother Bev Campbell when St. George's merged with St. Mary's. Since she was six, Rayna and her grandmother Bev have been faithful members of St. Mary's. Rayna shared her reflections, a testament to St. Mary's living into its mission, below with the Tuck Fund Scholarship Committee.

Over the past 12 months, things have taken a very unexpected turn for my family and me. My grandmother was diagnosed in the summertime with stage 4 lymphoma and began to decline very quickly. Seeing this happen all before my eyes while remembering the past and how she used to be was very difficult for me to accept and understand.

However, something that has stayed the same is her dedication to watching St. Mary's online worship through her iPad, so she can still feel like she belongs to our parish. Worship started to become a little difficult for me with all the occurring events, but what hasn't changed is our love of spending time together watching worship live on Facebook on most Sundays. Watching this with her, I can instantly tell it helps lift her spirits and overall it contributes to her well-being following her diagnosis. I am constantly worried about her well-being when I am away at school, but having St. Mary's streaming services on Sunday mornings and Evening Prayer throughout the week has helped calm my mind that this hour a day will contribute mostly to support her well-being.



Since her diagnosis, I have felt an intense pressure to step up to the plate while I'm in the midst of trying to figure out my path as a full-time student. Even though I am concerned about her well-being, I still need to tend to my well-being. I have felt guilty many days that I'm not doing enough to help her or

that I should be doing more to help her. However, I have realized that this is my time to be concerned about the well-being of my future since graduation is right around the corner. Many days I spend praying that things will get better and not be as difficult since my well-being is being put on the back burner a little bit, and I pray that I will be able to pull through.

Something I have noticed that has taken a lot of weight off of my shoulders is St. Mary's service to making her feel loved and cared about while she is going through a very dark time. It always brightens her day when Meagan or Jennifer comes to visit her, or someone from church comes to give her flowers and communion after Sunday worship. Most of the time she's only happy when I'm with her and not leaving her side, but that has been very difficult for me to do since I'm gone for weeks at a time to college. The service done by St. Mary's and the community has helped me believe that service is everywhere around us and that others do care about her greatly. I hope she can see that I'm not the only one who is able to care and love her.

As I come to the end of this chapter in my undergraduate career, I hope to move back to Rhode Island and be more present with everyone in the St. Mary's community since I have felt like I have been gone for too long since the Covid-19 pandemic in 2020 put a divider between me and my church community.

I couldn't be happier to be coming back home!

Worship

Worship is **at the heart** of St. Mary's mission, and as such, it receives 31% of the budget. Everything that we do is rooted in our life of gathering in praise and thanksgiving to God.

In 2023 St. Mary's **worship was richly varied**. Numerous changes contributed to this most vibrant element of parish life.

- **Beach compline** was offered twice in July and August at Third Beach in Middletown.
- The **5:00 Saturday evening service**, a quiet, contemplative service returned.
- Three new acolytes – Leo Barker, Sam Brower, and Isaac Nestlerode – **revitalized the acolyte program**.
- **Creative skits** replaced the sermon several times at outdoor worship.
- On occasion, **families gathered around the altar** for communion.
- Cory Thurston assumed the **role of greeter team coordinator**.

St. Mary's **music ministry** was in transition in 2023.

- The **music program leadership changed in 2023**. Michael Templeton, pastoral musician, left St. Mary's in March to pursue other interests.
- With the Rector, Brooke Huminski, Julie Zecher, Harry Gustafson, and Trish Culver **nurtured the choir** by selecting music, communicating with members, and providing choir administration.
- In the spring and summer David Warfield and Flo Olivera played the organ as well as offered musical direction. Throughout the fall, we had a variety of supply musicians including Peter Berton, director of the Choir School of Newport County; Marilyn Hambly, and Flo Olivera who led the choir and played the organ.
- St. Mary's began a **discernment process** that included a **dinner for choir members at the rectory and a Coffee and Conversation** all members of the parish to express what direction our music program to take.
- Christmas Eve the choir, guest soloists, and bell ringers provided **festive music** under Peter Berton's leadership.

Other changes in St. Mary's music program included

- new **choir new robes** in memory Robert E. Holmes and Nancy M. Holmes, choir member Karen Stevenson's parents, and
- the Choir School of Newport County's singing at the 9:00 worship service in October and December.



Highlights of our worship together included

- **blessing** our Lenten challenges, backpacks and briefcases, animals, and the community garden in 2023;
- **welcoming** 285 members, friends, and visitors to Christmas Eve services; and
- **continuing** to live-stream the 9:00 service to connect those unable to attend in-person with St. Mary's.

Invite Welcome Connect **supported families with children** in worship by

- adding a page - "**Children in Church**" - to the website to welcome families;
- reminding parents of young children that they **needn't be overly concerned about their children making noise** during the service:
- including "**A View from the Pew**" in the eNews to remind all parishioners of the challenges of bringing young children to church;
- **setting up TVs in the parish house** to livestream the 9:00 service for families who might have needed to leave the service but still wanted to be part of worship; and
- installing signs that **reserved parking spaces for families with children.**

Countless hours to support worship came from

- each staff member whether clergy or laity; and
- lay members in ministries – greeters, altar guild, lectors, eucharistic ministers, acolytes, choir members – all of whom help make our **worship holy and transcendent.**

Contributors: The Rev. Meaghan Brower, Lee Ferreira, The Rev. Jennifer Pedrick



Well-Being

"You matter here" are words sprinkled throughout St. Mary's conversations. St. Mary's cares for the spiritual, emotional, and physical well-being of its friends and members and allocates 20% of the budget for this area. As well as the budgeted amount, the Rector and Associate Rector disbursed over \$7000 through the St. Mary's discretionary fund to within the community as well as to people beyond.

New members to St. Mary's were welcomed into the parish on a special **Welcome Weekend in October**. Their welcome included a special **get-together at the rectory** to share fellowship and to hear each other's stories about what brought them to St. Mary's, why they stayed, and what they feel God is calling them to do.

St. Mary's provided special events and gatherings that **welcomed members and the wider community** by

- hosting **family dinners**, a harvest and an Advent dinner, a Shrove Tuesday pancake dinner with pancake races, **wine and cheese** on the first Saturday of the month after 5:00 worship, and **special coffee hours**;
- **providing space for four 12-step meetings** each week; and
- **opening the property for walking from sunrise to sunset** daily for the greater community.

St. Mary's hosted events throughout the summer to help our members as well as the greater community endeavor to experience **Rest and Play as Spiritual Practice**.

- Offering the opportunity for members of all ages to share in a meal and joyful playing, a second annual **"carry-in-carry-out" potluck** was held in June.
- Many members of the parish came together to host **Strawberry Sunday in June**. Strawberry picking at Quonset Farms which generously donated the strawberries, baking shortbread, preparing strawberries, and serving strawberry shortcake allowed many varied parishioners to offer their gifts for this celebration.
- Numerous members and friends **donated outdoor games** - pickleball, corn hole, giant Jenga, spike ball - from an Amazon wishlist that offered everyone the opportunity to play whether at church or the beach.
- We offered **two free outdoor concerts** featuring George Zecher and his steel drums and BarFly, a cover band. Each was well-attended and provided an opportunity for us to offer hospitality.
- Jenny Williams provided an introduction to our labyrinth with **"Labyrinth 101."**
- The Rev. Jennifer Pedrick led a **Rest and Return afternoon retreat**.
- **Two beach dinners were offered** on Sunday evenings for families of all sizes and ages to bring picnic dinners, toast s'mores, swim, and end the weekend with Compline.
- When the weather allowed, we gathered after worship for **tea and lemonade on the lawn**.

Several opportunities during the year offered to promote the **spiritual well-being of children and adults**.

- During Eastertide "Creation Care Kids," a Christian formation 6-week pilot class, offered St. Mary's children **the opportunity to see God's role in our creation**. Teachers for the class were Jason DeFalco, Terry Viera, Paul Westrom, and Jenny Williams.
- *Living Well through Advent: Practicing Wonder with All Your Heart, Soul, Strength and Mind* provided an opportunity for **weekly discussion** led by Jenny Williams.

The Pastoral Care Team offered **spiritual care to the parish** by



- **re-energizing the Lay Eucharistic visits** with training and scheduling of visits for new LEVs – Lori Rinkle, Alex Allardt, Pauline Davis, Andrea Kinsley – which allowed for **inclusive care for our homebound members**;
- **praying for members of the parish** in need and in celebration as well as **writing thoughtful notes** to the vestry, college students, and sick through the card ministry;
- **welcoming new members** Kati Machtley and Mary Weyhing to the card ministry; and
- **receiving spiritual care** from the Rev. Jennifer Pedrick.

Meeting weekly, the **St. Mary's Prayer Shawl Ministry** offered an opportunity for fellowship every Wednesday morning while

- **knitting** over 50 prayer shawls and prayer patches and lap robes to give to those who needed to know of St. Mary's spiritual support, and
- **supporting the Dr. Martin Luther King Community Center Santa's Workshop** with over 80 adult and children's hats, 69 pairs of mittens, 9 scarves, and 11 blankets and 3 sweaters for babies.

The **community garden** season began with the blessing that set the tone for providing nutritional and spiritual nourishment for our community and each other. During the season

- **new gardeners were welcomed** and several gardeners returned with continued enthusiasm,
- **pastoral care flowers provided beauty and comfort** to our parish and beyond, and
- **a beautiful new fence and gate were built** to protect the fruits of the gardeners' labors.

The Tuck Fund Committee contributed to the **emotional and financial well-being** of St. Mary's college students by

- **hosting a brunch** which allowed college students to visit with each other over winter break.
- **awarding \$27,000 in scholarships** to Emma Adkins, Mia Bartlett, Bella DeAngelo, Jane Kaull, Rayna Lombardo, Connor Pratt, Hailey Pratt, Claire Williams, and Melanie Williams.

We contributed to the **well-being of our planet in 2024** which helps our own well-being.

- The Community Outreach Team provided **new, reusable Nalgene St. Mary's water bottles to members**; sponsored **"Old Choice-Better Choice for a Healthy Planet"** activities that highlighted typical household products along with environmentally superior choices after worship on June 11; and organized **a field trip to "Basil and Bunnies,"** a local vegetarian restaurant, to enjoy plant-based comfort food.
- The Rev. Norman MacLeod visited St. Mary's and preached on Creation Care. He and St. Mary's member Emily Skeehan offered a discussion on Aquidneck Island Parish Resilience Project. Chris Barker acted as liaison for St. Mary's and the project.

Contributors: Pauline Davis, Lynn LeBlanc, Mary Kay Lundburg, Murry Edwards, Susan Kelchner, Elise La Parle Garcia, Karen Laroche



Service

Whenever we say the Baptismal Covenant, we vow to seek and serve Christ in all persons, respect the dignity of every human being, and to love our neighbors as ourselves. These principles are the very cornerstone of our faith and how we share the love of Christ with others.

At St. Mary's 22% of our budget helps us keep this vow. This includes our over \$75,000 apportionment to the diocese which supports statewide outreach programs.

St. Mary's fed our greater community in numerous ways which included

- **delivering fresh garden vegetables** to local food pantries on a regular basis;
- collecting and delivering **2584 pounds of non-perishable food** valued at almost \$5000 (based on a standard established by the non-profit organization Feeding America) to the MLK Community Center Food Pantry; and
- **hosting a monthly meal** at St. Paul's United Methodist Church that involves about 2 dozen St. Mary's folks making, preparing, and serving food to an average of 55 guests, an increase of 57% over 2022.

Not only did St. Mary's support the Dr. Martin Luther King Jr. Community Center with food, but our generosity was evident at Christmas as well.

- The knitting ministry (see Well-Being) **supplied many handmade items for Santa's Christmas Workshop.**
- **Through gift cards, 74 children were helped and 87 families through St. Mary's donations of gift cards for gifts and food.** The total value of the cards was up 33% from 2022!

The Community Outreach Team helped focus the parish's attention on **Creation Care in 2023.**

- Members of the congregation were invited to a Pizza and Movie night at Lynn Carlson's and George LeBlanc's to **watch and discuss David Attenborough: A Life on Our Planet.**
- A **Lenten challenge** was presented to the congregation to make at least one behavioral change during Lent and these intentions were blessed during a worship service.
- The **St. Mary's Day of Service focused on Creation Care.** Approximately 35 participants completed activities such as a beach clean-up, weeding at Spruce Farm, or planting trees and shrubs at Aginnovation Farm.
- In the spirit of "Reuse, Recycle, Reduce," the Community Outreach Team
 - **introduced the "GotSneakers" project** in the summer which collected dozens of pairs of sneakers for recycling; and
 - moved from the "GotSneakers" project to St. Pauly Textiles which **allows for recycling both clothes and shoes.**

To **focus on housing**, St. Mary's members and friends

- abundantly **filled 5 laundry baskets with household items** to help unhoused clients of Crossroads RI move into new apartments, and
- **heard from Ric Wild from Crossroads RI** during worship on November 12 about the work of Crossroads for the housing insecure.

Contributors: Dave Ferkinhoff, Elise LaParle Garcia, Jon Edwards, Judy Hall, Lynn Carlson



Stewardship

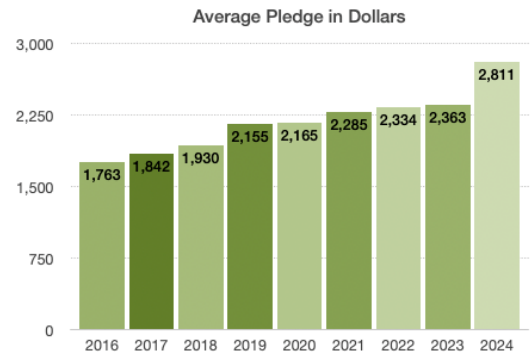
St. Mary's campaign theme for 2024 was "Rooted in Abundance," inspired from Jeremiah 17:8. This poetic and powerful verse speaks to the value of confidence in God, and it resonated with many of us as we reflected upon our faith and gratitude in God.

The total pledged for 2024's budget is \$300,825, a 27.67% increase from last year. The average pledge for 2024 is \$2811, a 4.7% increase from last year. The number of pledge units for St. Mary's 2024 budget is 107.

St. Mary's is entering the third and final year (2024) of the Historic Church Restoration Campaign. As of December 31, 2023, pledges received for the campaign totaled \$341,082, and of that, \$249,825 has been received.

2024 is the last year for fulfilling this pledge commitment, and we thank all who have given of their wisdom, work, and wealth to restore our beautiful church

Rita A. Verespy and Christine M. Winslow, Chairs



Sarah Gibbs Trust

The Sarah Gibbs Trustees are responsible for the oversight of St. Mary's grounds. Established by the Sarah Gibbs Trust in 1843, this group ensures that the property that Sarah Gibbs gave to "establish an Episcopal Church" is used to meet her wishes. The Trustees can either be independent or Vestry Trustees. The independent Trustees are self-nominating for up to seven 3-year terms. The Vestry Trustees are elected by the Vestry for the duration of their Vestry term to serve on the Trust. The Bishop of Rhode Island is an ex-officio member of the Trust

In January, Cousens Farm renewed its lease to farm the hayfield in 2023.

Fay Gosling accepted reappointment by the independent trustees for a three-year term ending in 2027 when her current term expires on March 1, 2024.

Respectfully submitted,

Jeff Belden, chair (ind., 2026); V. Ted Bierman (ind., 2025); David Brierley, treasurer (vestry, 2024); Jon Corbishley, (vestry, 2025); Fay Gosling, secretary (ind., 2024); Cory Thurston (vestry, 2026); The Rt. Rev. W. Nicholas Knisely, Bishop of the Diocese of Rhode Island, *ex officio*





Photo credits for the annual:
Meaghan Brower, John Corbishley
Murry Edwards, Dave Ferkinhoff,
Elise LaParle Garcia, Lynn Carlson
LeBlanc, Jennifer Pedrick