

132nd Annual Meeting Trinity Episcopal Church

January 25, 2026
Annual Report for Year Ending
December 31, 2025



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Agenda: Trinity Episcopal Church 132nd Annual Parish Meeting
January 25, 2026

CALL TO ORDER

Opening Prayer

Appointment of the Secretary

Approval of the Minutes from Previous Annual Meeting (January 26, 2025)

REPORTS

Financial Report: 2025 Year End and 2026 Budget—Scott Shapard

Foundation Report—Geoffrey Butler

Junior Warden's Report—Bruce Butler

Senior Warden's Report—Leah Carnahan

Rector's Report—The Rev. Dr. Robert F. Pace

RECOGNITION OF OUTGOING VESTRY

Olivia Aranda, Bruce Butler, Leah Carnahan, Luanne Kallas-Bruton

ANNOUNCEMENT OF NEW SENIOR WARDEN

CLOSING PRAYER/DISMISSAL

ADJOURN



131st Annual Parish Meeting Minutes: January 26, 2025

Meeting was called to order at 10:53am.

Opening Prayer by Father Robert Pace.

Appointment of Secretary

A motion of approval to elect Olivia Aranda as the Secretary made by Father Robert Pace.

Approval of the Minutes from Previous Annual Meeting (January 28, 2024)

A motion of approval to approve Minutes from Previous Annual Meeting made by Kathy Christoffel, seconded by Suzanne Rodriguez. Voice vote taken, motion passes.

Approval of the Minutes of the Elections Meeting (October 20, 2024)

A motion of approval to approve Minutes from Previous Annual Meeting made by Kathy Christoffel, seconded by Suzanne Rodriguez. Voice vote taken, motion passes.

Reports

Financial Report: 2024 Year-End and 2025 Budget – Scott Shapard

Scott presented the financial report for 2024 and the projected budget for 2025. The total receipts for 2024 were over \$1,327,998, with the majority coming from tithes and offerings. The foundation's continued support was highlighted as a unique and appreciated aspect. The revenue projections for 2025 are approximately \$1,328,000, while expenses are projected at \$1.4 million, indicating a potential deficit. However, the money designated from the reserve account will cover this deficit if necessary. The vestry is expected to formally approve the 2025 budget at their upcoming meeting.

Scott expressed his gratitude to the parishioners, the committee members, and the immediate past treasurer, Tony Rico, for their support and contributions. He also thanked Betty Capps, the parish administrator, for her invaluable assistance. Scott highlighted the importance of the parishioners' financial and prayerful support.

Junior Warden's Report – Bruce Butler

Bruce emphasized the role of the Junior Warden and the Building Committee in maintaining the property, facilities, and safety of the parish. He also acknowledged the successful year they had had, but noted one area that was not successful.

Bruce discussed an ongoing insurance claim for a hailstorm in March 2023. The initial assessment by an adjuster and a roofing expert indicated that the roof needed to be replaced, but the insurance company disagreed with the cost. They hired an engineer who concluded that the hailstorm caused significant damage to the 4-year-old slate roof. The insurance company offered to settle for a tenth of the actual repair cost, which was rejected. A private appraiser was hired, and the insurance company was required to hire an independent adjuster as well. The two adjusters are scheduled to meet to determine the total damages. If they can reach a conclusion, the insurance company and Bruce's team are bound by it. If not, the process will move to arbitration.

Bruce discussed various projects and improvements made at the church over the past two years. He highlighted the completion of the communion rail, installation of pew cushions and kneelers, and the formation of a needlepoint committee. Bruce also mentioned a collaboration with a Boy Scout troop to replace benches and an upgrade to the church's security system. He noted the addition of new cameras and security measures for safeguarding God's children and property. Furthermore, Bruce mentioned the renegotiation of contracts for air conditioning filters, AV room enhancements, and landscaping services. He encouraged attendees to report any issues or improvements needed in the church by writing them down in the Junior Warden notebook.

Senior Warden's Report – Leah Carnahan

Leah reported on the vestry's activities and plans for the upcoming year. She highlighted the focus on engagement, particularly in welcoming and connecting newcomers to the church. A working group led by Christine Moranetz had been researching and developing a newcomers ministry, with plans to be implemented this year. Leah also encouraged others to find ways to engage with the church's various ministries and serve the Lord.

Rector's Report – The Rev. Dr. Robert F. Pace

Father Robert announced that elections for the vestry and council delegates would be held in the fall, as per the church's bylaws.

Father Robert expressed his gratitude and appreciation for the parish's resilience and growth in 2024, despite facing challenges. He highlighted the dedication of staff, the success of Trinity Episcopal School, and the work of the Trinity Foundation. Father Robeert also announced his upcoming sabbatical and his excitement for the renewal committee's plans for Trinity's summer. He emphasized the importance of rest, learning, and nurturing one's faith and spirit.

Recognition Of Outgoing Vestry by Father Robert Pace

Suzanne Conerway, Burney Dickinson, Cindy Gill-Sams, and Chris Moranetz.

Recognition of Incoming Vestry by Father Robert Pace

Casey Bell, Chris Coppin, LaBron Chance, and Cecilia Speer.

Father Robert Pace elected Leah Carnahan as Senior Warden.

Closing Prayer (And Blessing Of The Meal) led by Father Robert Pace.

Adjourned

The meeting was adjourned at 11:33am.

Minutes of Annual Elections Meeting
Sunday, October 27, 2025 at 10:47 a.m.

The meeting was called to order at the conclusion of the worship service by Rev. Dr. Robert Pace who opened the meeting with prayer.

LaBron Chance was appointed secretary for the meeting.

Rev. Dr. Pace next reviewed the canonical qualifications for voting.

Candidates for Diocesan Council Casey Bell, LaBron Chance, Darren Elzie, and Amiso George were introduced and a motion to approve these representatives was made by Sue Rodriguez and several others to approve the nominees. After multiple seconds to the motion was approved by voice vote without objections.

Candidates for Vestry class of 2028, Amy Butler, Phil Cano, Daphne Kahn-Wiley, and Emily Pierson were then introduced. Kathy Christoffel and others moved to accept the slate of nominees as presented. There were numerous seconds and the voice vote was again unanimous.

Rev. Dr. Pace then recognized the other serving members of the vestry with thanks and adjourned the meeting.

Respectfully submitted,
LaBron Chance



Rector's Report

The year 2025 for Trinity Episcopal Church was one with continued growth and excitement. In order to get a “flavor” of our energy and progress, I thought that for this year’s annual report, I would continue a practice from last year in providing excerpts and summaries from my monthly Rector’s Reports to the Vestry. Of course, as you will see, there are some months of reporting missing (my “Sabbatical Summer”), but I’ll fill in those blanks as well. Overall, I think you will get the idea of how busy we are as a parish as we live into our call to be Christ in this world.

January: First, this month we are so grateful that the Rev. Eric Bumgardner has begun his official role as Associate Rector! He is such a strong clergy leader for our parish. Also, “This January, we can … be pleased by the work of the Stewardship Committee. We are happy to report that going into 2025, we have even surpassed our target goals for pledge commitments. The people of Trinity are responding to the call to be faithful stewards of our life and ministry. We started the new year with a lovely Epiphany Eucharist in the chapel on January 6, followed by beautiful worship on the Sunday of the “Baptism of our Lord,” at which we had two baptisms. Also in January, Darren Elzie preached on the Feast of Martin Luther King, Jr.” We also have lots of other activities, including the fact that Trinity is hosting the Dioceses of Texas North Region Pre-Council Meeting. Also, “on Sunday, January 25, we are holding our annual parish meeting, at which we say good-bye and thanks to our outgoing vestry members. We are so grateful to the three years of mission and leadership from Suzanne Conerway, Burney Dickinson, Cindy Gill-Sams, Chris Moranetz.”

February: This month, we welcomed our “new Vestry members: Casey Bell, Chris Coppin, LaBron Chance, and Cecelia Speer. I am also grateful for the continued leadership of our (ongoing) officers: Leah Carnahan (Sr. Warden), Bruce Butler (Jr. Warden), Scott Shapard (Treasurer), Olivia Aranda (Clerk), Sandy Liser (Chancellor). What a great leadership team for our parish!” “On February 7-8, the Diocese of Texas held its 176th Annual Council here in Fort Worth at the Convention Center downtown. I was so pleased with the role that Trinity played in this event. Scores of Trinity members volunteered to help out with logistics and to be hospitable to the rest of the diocese. Fr. Eric Bumgardner was on the worship committee, and he worked tirelessly to help organize a beautiful Eucharist on Friday night with more than a thousand participants. And our own Debbie Clark served as the Director of Music and organist for the worship as well. It was a beautiful time to be an Episcopalian in Fort Worth! I am also grateful for our Trinity delegates: Bruce Butler, Leah Carnahan, Darren Elzie, and Daphne Kahn-Wiley, who spent all day Saturday in the business meeting, helping to shape the next year of our diocese.” “Then, on Sunday, February 9, we enjoyed having our official episcopal visitation from Bishop Jeff Fisher. At the 9:30 service, he preached, celebrated the Eucharist, and he also confirmed five, received three, and reaffirmed the vows of one other at a beautiful service.” “February also brought our recognition of Black History Month. I am grateful for the work of our Peace and Justice Ministry. They brought in Dr. Richard Selcer, author of *Fort Worth in Black and White*, to do a presentation about the racial history of our city. In addition, on February 16, we celebrated the Feast of Absalom Jones, with special music and preaching around his life.”

March: This month, “we entered into a Holy Lent. I am grateful for those who helped serve pancakes for Shrove Tuesday, and Ash Wednesday services were wonderfully attended this year. Sarah Martinez is leading a wonderful Wednesday night Lenten Program. In addition, I have been leading a Sunday morning Lenten Series called *Dying Well in Christian Hope*, which seems to be well received.” Also this month, I want to thank Trinity and its leadership for your prayers and support. As you might know, “my mother, Joyce, died on March 21. I spent lots of time driving back and forth in the couple of weeks before her death, visiting with her and having sacred time together. Her funeral was on Friday, March 28. I am so overwhelmed with gratitude for all the love and support from the congregation.”

April: This month, “our Peace and Justice Ministry worked with Episcopal Health Foundation to bring ‘Traces of the Trade’ to Trinity. This presentation includes a documentary film showing and discussion by descendants of the ‘largest slave-trading family’ in the U.S. It was a frank and hopeful conversation which was very well attended.”

I am also grateful for “Trinity’s partnership with the AARP for tax preparation. Through April 15, we had several AARP volunteers preparing tax returns for no charge. I am grateful to parishioners Tony Rico and David Benson for facilitating this outreach activity every year. Tony informs me that once again this year, the Trinity site prepared more than 650 tax returns.”

“Of course, one of the best things to have happened in April was a beautiful and sacred Holy Week. From a triumphant Palm Sunday to the slow march of the Holy Week observances to the glory of Easter Sunday, this year was outstanding! Our Maundy Thursday service was powerful with foot washing and the stripping of the altar. On Good Friday, we had a beautiful noon service, with Mary Margaret Haraden playing the violin as the “rugged cross” was brought forward toward the altar. For the Good Friday evening service, Bishop Brian Seage preached a powerful sermon and the Voices of Fort Worth choir provided “transcendent” music throughout. Also on Good Friday, we had a wonderful children’s program (thanks to Rebecca Mattix and Carrie Stanley). Then, at the Easter Vigil on Saturday, we started the “new flame” of Easter, and we had a large group of reader-volunteers to make the service special. Finally, all three services on Easter Sunday were fantastic. Between the four services of Easter (Easter Vigil and the three Sunday services) we had an attendance of more than 540 people. What a great joy!”

May: As we enter into May, “I am in the final days’ countdown until my sabbatical. I am truly grateful for this opportunity to RENEW... I am looking forward to all of the travel and the time to reflect on ministry and REST. I am so grateful to the Lilly Foundation for the Clergy Renewal Grant that will allow me to travel, along with a grant from the Diocese of Texas that will supplement those expenses.” This month, I also want to highlight our wonderful Trinity staff. We have revamped our weekly planning processes, and that is because we have such talented people in this staff role. First, I want to express gratitude for the Rev. Eric Bumgartner, Associate Rector, whose wisdom and pastoral impulse is instrumental in our parish life. I am also very grateful to the Rev. Dr. Annelies Moeser, Campus Missioner. Her good humor and intellect are inspirational. Our parish is so blessed by Sarah Martinez, who has stepped into a new role as the Director of Ministry and Formation. She is part of the glue that keeps us on track “for Jesus.” Betty Capps, our Parish Financial Administrator, is an excellent accountant as well as a wonderful, thoughtful human being. Debora Clark, our long-time Director of Music Ministries is creative and talented and keeps our choral worship top-notch. Dr. Paul Warren, the Director of the Gathering Band is talented, giving, and a joy to work with. Rebecca Mattix, our Director of

Family Life is also creative and caring, and she has taken on the additional role this year of serving as the Chaplain for Trinity Episcopal School. Carrie Stanley is continuing to develop her role as our EYC Director, and she is always positive, thoughtful, and collegial. Will Martinez, our AV Tech, continues to develop his skills and abilities, offering his expertise and knowledge in making our worship “sound” good, while also creating a top-quality production for the livestream. I am also very grateful for Silvia Johannes, our Parish Assistant, who is very knowledgeable about the workings of the parish, and she is so friendly and professional in being the “face” of the parish at the office front desk. Finally, although not technically on our staff, I am so grateful for the faithful service of Officer Jim Owens, who greets all with hospitality on Sunday mornings, while also being present to keep us safe. I hope you all have the opportunity to thank these wonderful people for what they do for our parish.



June-August: During these months, I was on Sabbatical, so I did not write Rector’s Reports. But I would like to highlight, briefly, what I did on sabbatical, and also give some details about what happened at the parish in my absence. For my sabbatical, with the help of funds from the Lilly Foundation and the Diocese of Texas, I took four major trips:

- 1) In late May-early June, I travelled to South Carolina to see family and to bury my mother’s remains at the family cemetery in Marion, SC. It was an emotional and powerful trip.
- 2) In June, my wife Jill, my daughter Catherine, and I traveled to Italy. We spent several days each in Venice, Bologna, Florence, Rome, and Naples. We had a wonderful time as a family. We visited dozens of churches, explored dozens of museums (my daughter is an art historian), and “ate our way” through the whole country. It was a wonderful trip.
- 3) In July, I went to the U.K., accompanied by one of my oldest friends, Dr. Don Frazier, who is a historian (and a newly

confirmed Episcopalian). Our goal on this trip was to have a true spiritual pilgrimage going to various cathedrals and participating in their worship cycles. We started the trip in Edinburgh, Scotland, where we worshipped at St. John’s Scottish Episcopal Church. Then over the next few weeks, we spent sacred time at Durham Cathedral, the York Minster, St. David’s Cathedral in Wales, Salisbury Cathedral (where we also visited Stonehenge), Canterbury Cathedral, and Norwich Cathedral. We finished the trip in London, where we visited and worshipped in Westminster Abbey, Temple Church, St. Paul’s Cathedral, and St. Bartholomew the Greater

Church. This pilgrimage was spiritually rewarding, and it gave me great joy and strength in the faith.

- 4) In August, I travelled with one of my closest Episcopal priest friends, the Rev. Dr. James Pevehouse (Rector at St. Mark’s Episcopal Church in Beaumont), on a Civil Rights Pilgrimage. Our trip was profound and meaningful. Among the places we visited were: Atlanta (Jimmy Carter Presidential Library, the Absolom Jones Episcopal Center for Racial Healing, Morehouse College, Spellman College, Clark Atlanta University the Martin Luther King Center for Non-Violence, and Ebeneezer Baptist Church). Montogomery, Alabama (the Legacy Museum, the National



Memorial for Peace and Justice, the Montgomery Biscuits Baseball team); Selma, Alabama (walked the Selma Bridge and toured the town); Hayneville, Lowndes County, Alabama (participated in a march remembering Jonathan Daniels and other martyrs of Alabama, sponsored by the Episcopal Church); Birmingham, Alabama (Sixteenth Street Baptist Church, Birmingham Civil Rights Museum); Jackson, Mississippi (Mississippi State Museum for Civil Rights, Medgar Evers Home Historic Site). Memphis, Tennessee (National Museum for Civil Rights at the Lorraine Motel, the Stax Museum of Soul Music). This was a powerful and spiritual trip for both of us.

IN THE MEANTIME... Trinity's life and ministry continued uninterrupted during my absence. Fr. Eric Bumgardner did an outstanding job being the spiritual leader of the parish throughout the summer. With assistance from Mother Annelies and the whole Trinity staff, activities and ministries continued strong. The RENEW model guided the parish, with guest speakers and preachers, field trips to museums and a congregational pool party, a vibrant Egyptian-themed Vacation Bible School, a meaningful Youth Mission Trip to San Antonio, multiple events and wonderful activities all summer long at the parish. I am so grateful to the RENEW Committee, Fr. Eric, the Trinity Staff, Senior Warden Leah Carnahan, Junior Warden Bruce Butler, and the whole vestry for their faithful leadership during this summer.

September: "I am returning from this sabbatical "renewed" and ready to move into whatever God is calling this parish to do and be. I would like to share a couple of insights as I return from this time of renewal: In the wake of this time of renewal I want us to take some time to reflect as a vestry and as a parish that we actually ARE doing amazing work in being the Body of Christ. We need to keep finding opportunities to CELEBRATE that fact. AND, to note that some of our greatest strengths as a community of faith is that we are committed to WORSHIP, CREATIVITY, HOSPITALITY, and INCLUSION."

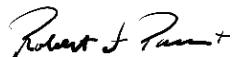
October: This month, I want to celebrate "the launching of the El Jardín (The Garden) Network here in the Fort Worth area. Father Javier Rivera is here working to build a network of Hispanic/Latino communities associated with the various Episcopal Churches in the region. As you know, we are serving as the 'base of operations' for this effort. Fr. Javier offices in one of our upstairs offices, and the Trinity staff has been great in helping him out when needed. In addition, Fr. Javier is going to preside over a Spanish language Eucharist on Sunday Nov. 2 (All Souls/ Dia de los Muertos). I hope you all get the opportunity to visit with Fr. Javier in the near future. "This past month I want to highlight some of our outstanding ministries with the women of our parish. The Women of Trinity are going strong with great participation in the monthly luncheon and speakers series. Rebecca Mattix and Carrie Stanley coordinated a Women's Retreat in Glen Rose this past month. And I am very much enjoying teaching the Book of Revelation to the 'Women's Bible Study with a Twist' group." "I am also very pleased with the efforts of our Stewardship Team. Co-Chaired by Rick and Tina Wells, the committee has coordinated communication with the parish, and has spurred on great participation in the fall pledge efforts. And as an 'off-shoot' of the stewardship team, the Golf Committee did an outstanding job putting on the 5th Annual Trinity Golf Tournament." "I want to commend the work of our Nominations Committee (Leah Carnahan, Bruce Butler, Luanne Kallas-Bruton, and Olivia Aranda. As you know, they did excellent work finding qualified and diverse candidates for the four spots coming up on our vestry. The candidates for vestry are: Amy Butler, Phil Cano,

Emily Pierson, and Daphne Kahn-Wiley. In addition the diocesan council delegate nominees are: Casey Bell, LaBron Chance, Darren Elzie, and Amiso George.”

November/December: In November “we had a beautiful All Saints Eucharist November 1, followed All Saints Sunday by another moving Requiem service performed by our choir and by the Voices of Fort Worth choir that rehearses in our nave every week. Also on All Souls, our new diocesan partner, Fr. Javier Rivera of ‘El Jardin’ Ministry, celebrated an All Souls Spanish Language Mass in our nave.” “As you know, as of December 1, we have also started the season of Advent, the beginning of the church year. We had a great start on the first Sunday of Advent with wreath making in the Parish Hall, and we’ve also had wonderful participation with the Trinity Reaching Out Giving Tree. Some of the specific ministries and activities I have been involved in this past month include work for the Diocese and teaching here in the Parish. For the Diocese, I am of the Commission on Ministry. And in November, we met at Camp Allen to review and interview all those “aspirants” who are seeking to become “postulants” for priesthood. I am also the Dean of the Fort Worth Convocation of the diocese, which means that I coordinate Clericus meetings for our North Region Clergy. In that role, I am also on the Executive Committee for the diocese, and I traveled to Camp Allen for that group in December. Here at Trinity, I greatly enjoyed once again teaching the Women’s Bible Study With a Twist. We completed a lively study of the Book of Revelation. Finally, I have enjoyed teaching with Fr. Eric and Sarah Martinez our ‘Embarking on the Episcopal Way’ series with several newcomers to the parish.” We look forward to beautiful Christmas Eve services, and we are blessed with great vibrancy in our ministries as we close out the year.

Conclusion: December 19 marked my sixth anniversary as your Rector. I feel so blessed to be walking alongside you in our Christian journeys. I am looking forward to what we will do together in 2026!

Blessings,



The Rev. Dr. Robert F. Pace



Senior Warden Report

The year of 2025, serving as Senior Warden has been a gift. A gift and blessing in growing my faith, meeting and working with different people, and focusing on all the wonderful opportunities ahead for this faith community. This has been a year of positivity, community, and growth.

The spring was focused on planning for Father Robert's very well deserved, hard earned sabbatical, to rest, learn and to renew his spirit. The gift of the Lilly Foundation grant allowed Father Robert to travel abroad, and it also provided for the congregation here in Fort Worth to experience our own learning, rest and renewal. The opportunity to learn from leaders in our community on topics like health and education, to gather in fun and fellowship and pause for a quiet day are all gifts made available to us through the grant. A special thank you to Christine Moranetz for her leadership of the grant committee to help us earn this award, and to Rick and Tina Wells for their willingness to take leadership of executing the RENEW plans, and the Stewardship campaign.

One of the remarkable gifts of this year was the ways in which we were able to meet some of the goals set by the Vestry retreat, not through intentional planning and scheduling, but by the Holy Spirit working through us all. The outcome of our retreat held at TCU last March was the idea to start engaging more with our community. We had some ideas of ways to do this, but not a formal scheduled plan in place when our retreat day was complete. We wanted to engage in conversation with the educational leaders in our community, engage more with our neighbors, as our members come from near and far to worship on Sundays. There was also an idea that surfaced during the retreat about engaging our Spanish speaking neighbors. Fast forward. We had speakers during our RENEW summer from Fort Worth ISD, UNT Health Science Center, and Brite Divinity School. Fellowship and connections occurred at the Kimbell Art Museum and Forest Park Pool. The Diocese of Texas asked if we could assist in hosting El Jardin. On top of all of this, Trinity opens its doors to host two 12-step groups, Voices of Fort Worth, two neighborhood associations, AARP Tax Aide, a quilting group, Widowed Persons Services of Tarrant County, Fort Worth Poetry Society, Girl Scouts, Explorer Scouts, and Tanglewood Moms Book Club. Increasingly, community engagement happens on the Trinity campus—one of the many ways the parish seeks to serve all people. These activities all met the goal ideas that were germinated at the retreat. These experiences of RENEWal were blessings to us all.

Another blessing this past year was the growth experienced at Trinity. The Newcomer's Ministry that began as an outcome of the Vestry retreat in 2024, came into fuller blossom in 2025. The Newcomer's receptions, Embarking on the Episcopal Way classes, and the newcomer's blessing are joyous ways we are growing as a faith community and living into our mission as a welcoming place for all.

Finally, 2025 for me as Senior Warden was a time of positivity and joy. I have had the wonderful blessing of leading our Vestry in a time of RENEWal with the amazing people I serve with. I think people have two views of the Vestry, and neither are completely accurate. One is that they are not really sure what "Vestry" actually is. We Episcopalians tend to have names for things that those outside, and even people inside the church, don't really have the slightest clue what they mean! The other viewpoint is that the Vestry is a contentious group with frustrating

meetings that last forever! For me, the Vestry at Trinity is a group of members who are faithful and loving, and meet monthly to oversee the business of the church and steward the church to serve our mission to be a loving presence in Fort Worth, Texas. We start each meeting in prayer and reflection, we discuss, we vote, and we pray again as we conclude our time together. I have loved serving on the Vestry at Trinity. It has allowed me to get to know members who attend services beyond the one I typically attend. The past three years have, at times, challenged my faith and leadership, but they have also blessed and enriched my faith and my life. I am so grateful I listened and said yes when I was asked to serve, and then I said yes again when Father Robert asked me to take on the role of Senior Warden. While I have not always lived up to my own personal expectations, I have done all that I can, with faithful prayer and always, with God's help. We can always do something, with God's help. What is God calling you to do to serve the church and the world? I encourage you to pray and consider what you are called to do, with God's help.

Peace & Love,
Leah Carnahan

Junior Warden Report

This is my third time to write for the Annual Report and every year I have to start by giving an update on the lack of progress of the insurance hail claim. Thankfully I can give a positive report this year. On Dec. 2 we received an electronic payment from the Church Insurance Company for the hail damages plus a penalty for the delay in paying the claim. The Building and Grounds Ministry Group (B&G) has met with two roofing contractors to discuss their bids and scope of work for the replacement of our roof. We have awarded the contract to one of these roofing companies. B&G is now in the process of getting approval from the Finance Committee and the Vestry. Our goal is to have everything in place to begin construction as soon as possible. B&G is also waiting for approval of the same two committees to use some of the insurance payment penalty funds to repair the flat roofs. This year we have had some real problems with the HVAC system. One company did the necessary repairs to the system to have heat and cooling as needed. They also repaired several condensation lines that had been damaged by rodents chewing on the plastic lines which caused leaks in the ceiling. As the B&G developed the budget for this year we included a preventive maintenance contract for the HVAC. This should help maintain our system, prevent future mechanical problems and any needed repairs would be at a discounted rate. In an effort to make the church more attractive the landscaper began by trimming the trees to raise the canopy so the church building is more visible. He has also started planting seasonal flowers in the beds to add color. This is my last Junior Warden's report so I would like to say it has been a pleasure to serve as the Junior Warden for the last three years. I could not have done this without the support and encouragement of the Buildings & Grounds Ministry Group: David McClellan, George Hawkins, Jim Brewer, Dennis and Kathy Christoffel, LaBron Chance, Mark and Christa McClary, Mary Lou Butler and Vicki Blanton. Special thanks to Fr. Robert, Fr. Eric and Betty Capps, the Parish Administrator.

Respectfully Submitted,
Bruce Butler

Financial Report
Summary of 2025 Financial Information
Trinity Episcopal Church

The Finance Committee faithfully meets once per month to review and discuss the monthly financial reports as prepared by Betty Capps, our wonderful Parish Administrator. Any action items or proposals are forwarded from the Finance Committee to the Vestry for consideration and approval. This report will include narrative highlights from 2025, a look ahead at the 2026 Budget and a report outlining our 2025 Budget vs 2025 Actual vs the proposed 2026 Budget.

2025 Highlights

The 2025 Operating Budget projected an approximate \$93,000 deficit, which was to be funded by Trinity Operating Reserves. We are happy to report we did not need the projected \$93,000 from the reserve funds to fund our operations, programs and ministries. We did finish the year at a \$35,881 deficit, which was covered by Trinity Operating Reserves, which means we finished the year \$57,713 better than budgeted.

In 2025, Total Receipts of \$1,448,797 were broken down as follows:

- Tithes and Offerings \$1,023,619
- Seasonal Offerings \$11,010
- Other Receipts (Trinity Foundation Support, fund raiser, interest income, net asset release from restricted/unrestricted accounts, etc) \$414,168

Our total receipts exceeded the 2025 Budgeted Projection of \$1,421,920 by \$26,877.

Trinity's total operational expenses for 2025 amounted to \$1,484,679 which were \$62,758 over the budgeted amount of \$1,421,920.

- Total Personnel costs of \$768,585 were under budget by \$5,547
- Administration expenses for office, communications and insurance were \$135,913, which was \$11,014 over budget. This is mainly attributable to an unfavorable commercial insurance renewal
- Buildings and Grounds for facilities, utilities and major capital improvements were over budget by \$70,189, which primarily can be attributed to the unforeseen HVAC repairs.
- Parish Ministries which include educational activities for all ages, worship, music, fellowship, pastoral ministries, stewardship and outreach and missions were under budget by \$12,897.

2026 Budget Highlights

The proposed 2026 Budget has been diligently and prayerfully worked on by the clergy and staff as well as the Finance Committee throughout the fall of 2025. The projected receipts for 2026 are an approximate \$1,324,172 while projected expenses are an approximate \$1,445,052. This projected deficit is mainly attributable to an increasing Diocesan assessment, insurance and the hiring of a new part-time sexton. There are modest increases in personnel and some of our ministries and programs. Just as we did in 2025, we will fund this projected deficit, should it occur, with Trinity Operating Reserves.

Overall Financial Health and Thank You

Although we are budgeting a deficit, which is covered by reserves, we believe this is a sign of a vibrant, growing parish. We will have increased expenses as we continue to grow our ministries

in the community and provide more opportunities within our parish, but the lay leaders, staff and clergy are being good stewards of the gifts received. With that said, a big thank you to all for providing financial support to the life and ministries of Trinity Episcopal Church.

At year end of 2025, our total cash accounts totaled \$1,294,418, which includes our checking accounts and money market accounts. Much of this is for Donor Restricted Accounts and Reserves. We have daily operating cash available of \$141,770 as of 12/31/25.

As I wrap up my second year serving as the Treasurer, I want to personally thank Fr. Robert for trusting me to serve. I also want to thank Betty Capps, our Parish Administrator, for all her work, dedication, communication and making my second year as smooth as one could hope. For the leadership of our clergy, wardens and other Finance Committee members, I give thanks for their faithfulness in serving and their wisdom provided as we continue to oversee the gifts of God through the ministries of this parish.

Respectfully submitted,
Scott Shapard

Trinity Episcopal Church

2025 Budget, 2025 Actual Results and 2026 Preliminary Budget

	<u>Budget</u> <u>2025</u>	<u>Actual</u> <u>2025</u>	<u>Budget</u> <u>2026</u>
Revenues			
Tithes & Offerings			
Pledge	\$ 820,000	\$ 834,161	\$ 850,000
Contributions/No-Pledge	125,000	176,149	155,000
Plate	14,000	13,310	15,000
Total Tithes & Offerings	959,000	1,023,619	1,020,000
Other Receipts			
Annual Fund Raiser	25,000	28,780	28,000
Event & Bldg. Use Fees	-	-	-
TES Ins./Maint./etc.	23,420	23,009	24,022
General, Misc.	1,600	1,249	1,300
Interest Income	10,000	14,199	14,000
Net Assets Released from Restricted - Unrestricted	297,581	345,828	221,900
Gas/Oil Royalties	875	1,103	1,000
Total Other Receipts	358,476	414,168	290,222
Total Seasonal Offerings	10,850	11,010	13,950
Total Revenues	\$ 1,328,326	\$ 1,448,797	\$ 1,324,172
Expenses			
Total Personnel	774,134	768,586	800,692
Total Administration	124,899	135,913	142,005
Total Building & Grounds	126,700	196,889	144,211
Total Diocesan and National	116,288	118,865	120,394
Total Trinity Reaching Out	60,000	59,480	60,000
Total Parish Ministries	219,900	204,946	177,750
Total Extraordinary Expenses Outside of Budget	-	-	-
Total Expenses	\$ 1,421,921	\$ 1,484,679	\$ 1,445,052
Total Parish Results	\$ (93,595)	\$ (35,881)	\$ (120,880)

Trinity Episcopal Church Foundation Report

Investments: The Foundation's investment objective is to generate sufficient long-term rates of return to provide sustainable and increasing levels of support for the Church, while preserving the purchasing power of the investment portfolio and complying with the wishes of the Foundation's donors. Stuart Murff, investment manager and board chair, retired from the board in April. During Mr. Murff's tenure, solid performance and additional donations enabled the funds to grow significantly thereby increasing the annual distributions to the church. Subsequently, Holt Capital Partners, a local Fort Worth firm founded in 2001, was retained as the new investment manager.

Distributions to Trinity: Funds are distributed only to Trinity Episcopal Church at the request of the Vestry. The Foundation's spending policy allows a distribution of up to 5% of a three-year rolling average of the investments. In 2025, this amounted to \$122,000; for 2026, the projected distribution is \$139,000, reflecting growth in the Foundation's capacity for sustained support. The Foundation manages 13 funds, some with specific restrictions, while unrestricted funds offer the greatest flexibility to address church needs.

Summary Table (2021–2025):

Year-End	Ending Balance	Gifts Received	Distributions to Trinity
2021	\$1,998,934	\$8,556	\$104,996
2022	\$2,242,329	\$488,219	\$110,000
2023	\$2,388,691	\$95,000	\$110,000
2024	\$2,876,259	\$331,994	\$115,000
2025	\$3,168,837	\$36,550	\$122,000

Strategic Planning

During the year, the Foundation Board engaged in targeted workshops to:

- Streamline internal operations,
- Clarify the Foundation's messaging,
- Enhance communication with both the parish and Vestry, and
- Strengthen engagement with Cornerstone donors.

Key initiatives include:

- Website accessibility and upgrades,
- Updated informational pamphlets displayed in the parish hall,
- Cornerstone and Foundation information events,
- Increased visibility on Connect Sunday,
- A newly expanded Cornerstone Society plaque displayed in the parish hall, and
- Quarterly reports delivered by the chair to the Vestry.

Foundation Board: Geoffrey Butler, Chair; Brian Drake, Investment Committee Chair; Jackie Ferguson, Secretary and Communication Chair; Scott Fletcher; Lisa Grider, Development Committee Chair; Raymond King; Dylan McNeill, Treasurer; Caron Moore; Scott Nishimura; Jordan Parker, Chancellor; Tony Rico, Vice-Chair; Cecelia Speer; Rick Wells, Vestry Liaison

Respectfully submitted,
Geoffrey C. Butler

Trinity Reaching Out Report

The Trinity Reaching Out Ministry Group (TRO) strives to follow the example of Jesus Christ by reaching out to love and serve those in need. TRO does several things. We are a grant-making organization, giving about \$50,000 annually to 501(c)3 nonprofits whose missions align with the core values of Trinity Episcopal Church. We also give about \$8,000 annually to organizations that present us with compelling stories of emerging need. We host numerous service projects throughout the year, and we seek regular opportunities for parishioners to volunteer together.

2025 annual grant recipients: 4Saints & Friends Episcopal Food Pantry; First Street Mission; Trinity Habitat for Humanity; Opening Doors for Women in Need; Presbyterian Night Shelter; DRC Solutions; Pathfinders; Laundry Love Fort Worth; and Center for Transforming Lives.

2025 emerging needs grant recipients: Episcopal Relief & Development Disaster Outreach for post-July 4 flood relief; Direct Reinvestment in People for new uniforms provided to students at Clifford Davis Elementary School; 4Saints & Friends Episcopal Food Pantry, for hygiene products for seniors and purchase of food during the government shutdown.

TRO's service projects in 2025 included:

- Food drives for 4Saints
- Thanksgiving groceries and turkey vouchers for 20 families at the McLean Sixth Grade
- Giving Tree, with help from our EYC youth group. Thanks to the generosity of Trinity parishioners and preschool families, we donated 60 new hardcover books to the McLean 6th library; 207 pairs of gloves and 440 pairs of socks for 4Saints & Friends to distribute this winter; a minivan full of art supplies to Laundry Love Fort Worth to entertain children at the craft area; and 180 gifts for children living at the Presbyterian Night Shelter. Your support of our community is helping to spread God's love and make Christmas brighter.
- 500 hygiene bags for clients at DRC Solutions
- 48 Journey Home baskets for Presbyterian Night Shelter families
- 150 Sack lunches for Presbyterian Night Shelter families

~ Scott Nishimura, Chair, and Jackie Ferguson, TRO Vice Chairs

Family & Children Ministry

Last year, we tried a lot of new things here at Trinity. Shrove Tuesday was a blast, hosted by the Men's Bible Study, with pancake races and such a surprising turnout that we experienced a shortage of their delicious fluffy pancakes. In lieu of Stations of the Cross for children, we made pretzel ornaments, ate big soft pretzels, and learned the history of the monk who invented the treat. Easter was a success with eggs absolutely everywhere. I think we were still finding eggs until VBS. Eggsellent hiding skills, Trinity Youth! Vacation Bible School last summer was a great success, thanks to a handful of dedicated parishioners. From hand sewn costumes, expertly crafted decorations, and an authentic Egyptian meal, the children we served were fully immersed in imagining what life would have been like for Joseph. This upcoming summer, Trinity will be trying something new again and shifting from a week of child drop-off for VBS to a weekend of togetherness with a very intentional Family Spiritual Retreat. This will give families the opportunity to connect in a new way, learn things together, and get to know other families with similar values. I invite you to share this with people outside of the Trinity community as new details emerge. Children's formation has been a struggle this year. Our main classroom experienced water damage from the A/C unit and it hasn't yet been restored. Godly Play has seen a decline in attendance, and we are down to two teachers and two substitute teachers this year. Our older children no longer feel that they have a place in formation, as there isn't an age-specific class for children aged 9-12. It is my intention to form a class just for this age group that is interesting and interactive. If anyone has feedback about Godly Play being the only children's formation opportunity, I would like to know what might work better to serve our Trinity families.

Trinity Episcopal School is the best part of my work week. This year, we've implemented chapel for every child, even the toddlers. Pre-K and Bridge children are also receiving Godly Play once a week. I hear from parents that it is their favorite class to attend. Trinity Kids are an absolute joy to teach. Their little hearts have big questions and intriguing responses to the bible and prayer. I am proud to be part of their Episcopal education.

Thank you, Trinity for always being supportive of children's ministry and for always saying "yes." The Trinity Village is one of compassion and support. I am so honored to be part of it.

~ Rebecca Mattix

Youth Ministry Report

It is such a joy to share with you the heart of our Episcopal Youth Community (EYC) over this past year. This report is more than just a list of events; it is a celebration of the moments where we saw God moving through our young people. I am so grateful to walk this journey alongside your children and your families, and I want to thank you for the warmth and support you have shown our ministry at every turn.

Following a parish-wide survey regarding Trinity's Youth Program, a dedicated task force of parents worked to create a clear vision for our EYC. Our goal was to define a "Portrait of a Trinity EYC Graduate"—the characteristics and formation goals we hope every youth carries with them into adulthood. We also established a set of core characteristics for the leaders and volunteers who shepherd them.

Trinity EYC Vision: Trinity EYC strives to nurture youth who are deeply rooted in the Episcopal faith, confident in articulating and living out their beliefs, actively engaged in church life, committed to service, encouraged to question and grow in their faith, and dedicated to appreciating the diversity of God's creation.

A Graduate of Trinity EYC is:

- Knowledgeable about the Bible, the Church, and the Episcopal faith and liturgy. They confidently articulate and defend their faith while living out the Baptismal Covenant.
- A valued member of the Trinity Parish who is active in the life of the church and develops an appreciation for lifetime involvement in parish life.
- Service-oriented, contributing to both Trinity and the broader community, and understanding that serving others is a vital expression of their faith.
- Confident in their own faith having felt encouraged and comfortable to question and develop a strong foundation throughout their time as a youth.
- Welcoming, accepting, and inclusive, respecting and embracing the diversity of God's creation in people, perspectives, the environment, and themselves.

A Leader of Trinity EYC:

- Fosters spiritual growth and empowers youth to develop healthy relationships with others and the church, and within themselves.

- Is warm, welcoming, inclusive, fun, relatable and authentic.
- Actively engages in the life of the parish, facilitating connections between members and youth, while prioritizing their own spiritual development.
- Cultivates a safe environment that is physically, emotionally, spiritually, and socially secure for all participants.
- Communicates effectively, in all types of communication, with all members of the community; parents, youth, parish, staff, and clergy.

Our commitment to service was most visible during our 2025 San Antonio Mission Trip. Our teenagers stepped outside their comfort zones to provide:

- Restoration: Essential housing and storage repairs.
- Relief: Urban and greenspace revitalization.
- Pilgrimage: A spiritual journey to the historic San Antonio Missions, connecting Texas history with modern discipleship.

This life-changing experience was fueled by our TCU parking lot fundraisers. The mobilization of parent participation and youth dedication provided every necessary resource to send our team into the field.

Beyond our travels, we remained committed to our own backyard through several key initiatives:

- Birthday Bags: Assembled and delivered for the 4Saints & Friends Food Pantry.
- Apartment Starter Bags: Supporting those transitioning into permanent housing through the Presbyterian Night Shelter.

None of these achievements would be possible without fiscal responsibility and strong leadership. Through regular consultation with Fr. Eric Baumgardner and Sarah Martinez, we have kept our ministry aligned with the parish's broader vision. We have also modernized our operations, working with the bookkeeper on budget discipline and utilizing the BAND app for real-time family communication.

I am overwhelmed by the support and generosity shown to me by the Trinity staff—including the cross-departmental help from Will Martinez—and our many families. Thank you for allowing me the space to live out my faith in action and for helping me grow in confidence in this position. It is a true honor to walk this journey with your children.

~ Carrie Stanley

Trinity Episcopal School Report

Trinity Episcopal School, established in 1952, had a strong and positive year as the parish's fully accredited half-day preschool and an important expression of the church's ministry to children and families. Rooted in Episcopal values of hospitality, compassion, and respect, the school serves children and families with care, creativity, and professionalism. Enrollment remained strong throughout 2025, averaging 96% capacity. This level of enrollment reflects sustained confidence from families and the broader community in the quality of Trinity Episcopal School's program and reputation. The school has a developmentally appropriate, play-based curriculum that supports children's social, emotional, cognitive, and spiritual growth. Classroom environments remain engaging, safe, and well-resourced, supporting positive outcomes for students and families alike. The school is fortunate to have an exceptional team of teachers and staff. Last year, adding to our staff Chaplin Rebecca Mattix. Their professionalism, dedication, and care for students are central to the school's success. Faculty demonstrates strong collaboration, consistent communication with families, and a deep commitment to early childhood best practices. At the end of the past year, the school began a search for a new director. This process is underway with the goal of identifying a leader who will uphold the school's mission, support faculty excellence, and guide Trinity Episcopal School into its next chapter. The school remains stable and well-supported during this transition. Parent engagement and community support remain strong. Looking ahead, Trinity Episcopal School is well-positioned for continued success, with solid enrollment, a dedicated staff, and a newly adopted strategic plan with a clear focus on the school's mission and vision.

~ David McClellan, TES Board

Newcomers Ministry Group

The Newcomers Ministry began in April 2025 with a focus on welcoming and connecting with those who are new to Trinity. We started by hosting Newcomers Receptions, followed by classes that introduce the Episcopal Church, its history, and beliefs.

Our first reception was held on August 17 with eight newcomers in attendance, including several first-time visitors. We met additional newcomers on Ministry Sunday, September 21, and held a second reception on November 9 with thirteen attendees. This was followed by our first Embarking on the Episcopal Way series, where several participants expressed

interest in Confirmation, Reaffirmation, or Reception.

We plan to continue offering regular receptions and learning opportunities. The Newcomers Working Group has also made recommendations to help newcomers more easily connect and feel at home at Trinity, which we hope to implement as the ministry grows.

~ Amy Butler, Chair

Senior Ministry

This ministry is open to our parishioners of any age who consider themselves seniors or are caring for elderly family members. Our focus is on the spiritual, social and emotional needs of our aging population. We meet the second Thursday of the month at 12 noon, except for announced changes. We do not meet in January or August. In 2025, we have had four restaurant lunches, one brunch, with an average attendance of 25. In coordination with Trinity's summer of renewal program, we hosted a museum tour at Sid Richardson Museum, with lunch following.

To continue our spiritual growth, we had a guest speaker on *Cultivating Balance in Aging*, our Senior Spiritual Retreat, and a guest speaker on *Telling Your Story Through Writing and Prayer*. We also had a gathering to share individual prayers while enjoying brunch. To share joy, we had a Texas Rangers game last summer (they won!), and the year's highlight was our catered Christmas Party with our Gathering Band performing, THREE dancing Santas, and a sing along to our favorite Christmas tunes.

Senior Ministry sponsored Widowed Person's Support Service of Tarrant Co, meeting in July and August in our church, and An Experiential Look at Dementia, presented by Gail Snyder of Dementia Friendly Fort Worth.

Our goals remain the same for 2026. Speakers will include Dr. Al Mathe, an inpatient Palliative Care Physician, speaking on the medical specialty of palliative care and hospice, and the hospital experience as a senior. John Loggins will present on finding your hobby/passion in retirement, and there will be a program presented by TCC on Cyber Security for Seniors.

We will continue to have announced restaurant lunches, we ask for prayerful donations as participants are able, but there are no charges for this ministry. Lunch provided at our events.

Our new email is seniors@fortworthtrinity.org. We welcome suggestions for programming, questions, as well as using this site to reserve a spot for programs.

Respectfully submitted,
Senior Ministry Committee

Golf Tournament

The 5th annual Trinity Golf Tournament was held on October 20 at Hawks Creek Golf Club in Fort Worth. The tournament was a huge success as we netted over \$23,300. Last year we netted \$18,000 so we continue to grow the event each year. This year we received \$4,000 dollars in silent auctions compared to \$2,000 a year ago, and we had 21 hole sponsor signs as compared to 19 the prior year. We sold \$4,600 in raffle tickets compared to \$2,900 last year. A very special thanks to everyone who purchased raffle tickets and a very special thanks to the 56 players who played in the tournament. Raffle ticket winners in our congregation were Rick Wells, Jim Lott, Frank Quattrochi, Colonel Massad, Mary Kelly, and the closest to the hole was awarded to Victor Mashburn. Congratulations to all the winners! The 2026 tournament is scheduled for October 19, so put it on your calendar. Planning is underway to bring you new and exciting ideas for 2026's event with bigger and better and more prizes! It has all the makings of something special!

Respectfully submitted,
Mark Neyland

