



# A Year of Resiliency and Resolve



Dear Friends,

I hope you will find our annual State of the Parish Report as consoling as do I. The past year has been challenging on so many levels as individually and collectively we have tried to cope with the Covid-19 pandemic. While we are certainly not out of the woods yet, we continue to make our way toward the 'new normal'. And in the midst of all the challenges, St. Peter Parish has demonstrated not merely resiliency but resolve to come back better and stronger.

The end of fiscal year 2021 finds us in much better shape than anyone would have imagined last year. While the leadership of Father Shea, along with the Parish staff, the Pastoral Council and the Finance Council were critical to the Parish's resiliency, the real credit belongs to you, the parishioners. You remained faithful to the parish even when it was prudent to stay at home. Thanks to your generosity this past year, the parish is on a firm foundation to tackle the challenges that remain from the pandemic as well as the opportunities that lie ahead, especially those that had to be put on hold.

Let us continue to pray for each other that we as a parish may remain united in faith, hope and love. Let us continue to work together on our parish goals and programs in light of the Universal Apostolic Preferences of the Society of Jesus, which were confirmed by Pope Francis in 2019. The Universal Apostolic Priorities give direction to our identity and mission and call us:

*To show the way to God through the Spiritual Exercises and discernment.*

*To walk with the poor, the outcast of the world, those whose dignity has been violated, in a mission of reconciliation and justice.*

*To accompany young people in the creation of a hope-filled future.*

*To collaborate in the care of our common home.*

The year ahead is full of promise, thanks to your continued commitment. May God continue to bless and multiply our efforts.

Gratefully in Christ,

Fr. Tim Stephens, S.J.

**State of the Parish Report  
July 2020-June 2021**

## Message from the Pastoral Council Chair

First of all, on behalf of the Pastoral Council, I would like to thank all parishioners for their perseverance, understanding and flexibility during this past year. The 2020/2021 year has been defined, by many, as the year of the Pandemic and isolation. However, for our Parish, it was a year of continued growth, discernment and community even though we were not able to always be together in person.

We showed our strength by continuing active participation in the Mass, whether in person or on-line. Our ministries quickly flexed and ultimately embraced connections through on-line mediums instead of traditional face to face interactions. In person participation in the Mass was re-introduced in a thoughtful and safe manner. It felt very different at first, but ultimately very familiar and welcoming.

Despite all of the challenges experienced this past year, we as a Parish, came together and stayed engaged. Our Parish actually grew in membership and we maintained our financial support through on-line giving. Our continued growth will put pressures on our facilities and the Facilities Commission is actively working on proposals to address our physical requirements.

Finally, our Parish, saw the departure of Fr. Jim Shea, our Pastor for the last six years, and warmly welcomed Fr. Tim Stephens as our new Pastor. We are very blessed to have Fr. Tim and his appointment is a direct reflection of our growth and overall importance within the Jesuit parishes.

It has truly been an honor to serve as your Pastoral Council Chair this past year. The future looks bright for our Parish and I am happy to introduce Matt Springman as the Chair of the Pastoral Council for the upcoming 2021/2022 year.

Thanks to all for your continued commitment to St. Peter's,  
Chris Brown

### 2020-2021 Pastoral Council Lay Members:

Chair	Chris Brown
Vice Chair	Matthew Springman
Immediate Past Chair	David Schilli
Secretary	Moe Cieri

### Parish Highlights

1863	Registered Households
4529	Individual Members (including children)
2.4	Average Members per Household
35	Average age of parishioners

### Parish Staff

3	Jesuit Priests
2	Deacons
9	Staff Members (7 full-time, 2 part-time)

### Commission Leads:

Liturgy & Worship	Rick Hudson
Education & Formation	Michelle Maidt
Communication	Susan Long
Buildings & Facilities	Tom O'Brien
Parish Life	Jane O'Donoghue
Social Justice & Outreach	Karen Leggio
20s and 30s Ministry	Abbey Kinnaman
At Large Member	Tracy Stouse

### Sacramental Ministry

129	Baptisms
41	First Reconciliation / First Communion
53	Confirmation
16	RCIA & Adult Confirmation
50	Marriage Prep and Weddings

### Our Mission

As a Catholic Jesuit parish in Charlotte's Center City, we are animated by the spirit of St. Ignatius and welcome all to share in the joy of the Gospel and to come to know, love and serve God and one another.

### Our Vision

- Stronger Together** We are a joyful, supportive, engaged and connected parish community.
- Go Deeper** Parishioners have the tools to go deeper spiritually and are grounded in an Ignatian foundation and aware of a God who is trying to be known to them.
- Go Forth** United through our Ignatian spirituality, we lead and serve others in all our communities of engagement.
- Thriving Foundation** Our parish structure is well-organized and resourced to be responsive and support our mission.



## Message from Finance Council Chairperson

As Chair of our Finance Council, I am excited to advise that St. Peter’s financial position continues to remain healthy, despite the many challenges due to the COVID-19 pandemic. I am grateful to the members of our parish for their continued financial stewardship during these uncharted times. We are very fortunate to enjoy such support from our parishioners.

Our Parish operating revenue of \$1,887,538 exceeded our operating expenses of \$1,572,830. This surplus has enabled us to absorb over \$38,000 in capitalized expenditures and improvements while increasing our reserves. We expect this surplus will give us the flexibility to cover projected shortfalls and necessary facility maintenance of our aged campus this coming fiscal year.

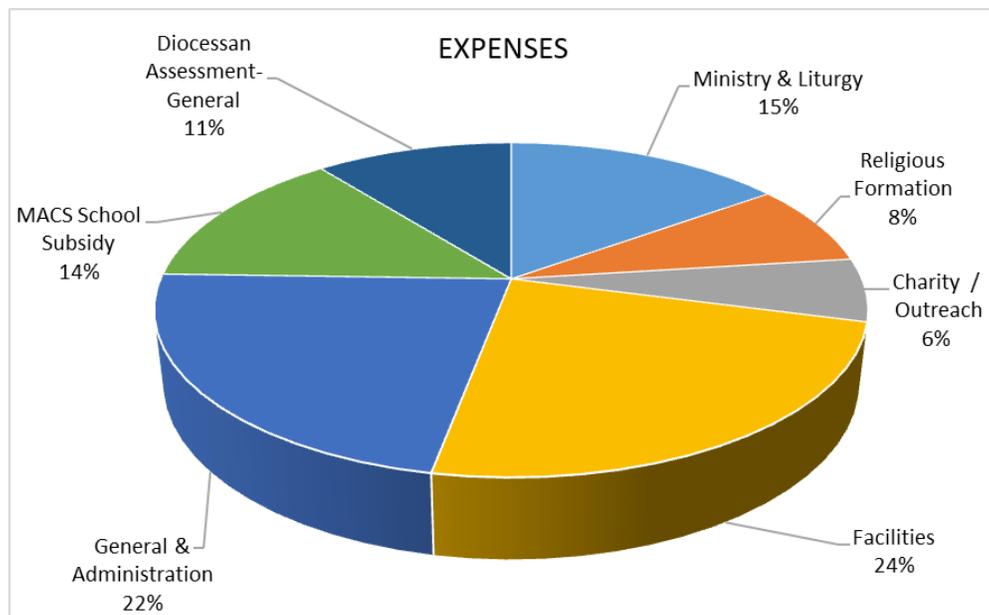
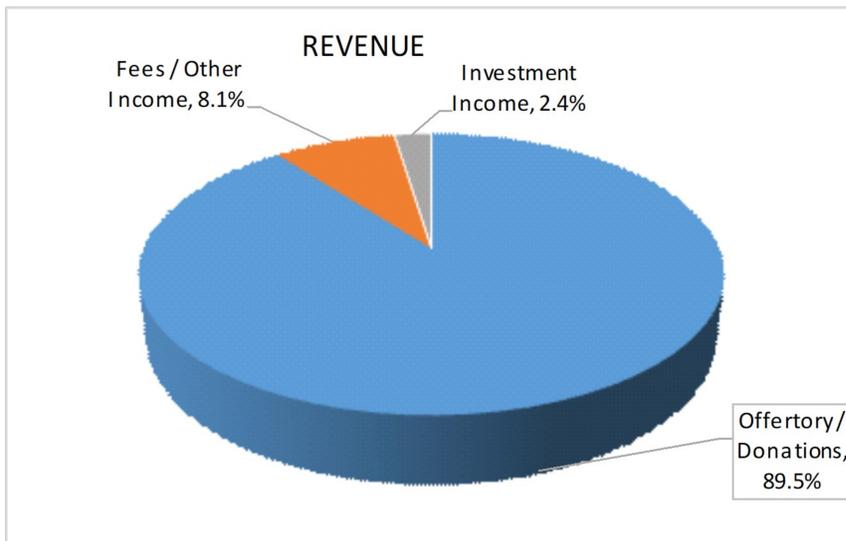
St Peter continues to grow. Our registered households increased by 5% to 1,863. Our operating revenue increased by 1% while our electronic giving has increased from 65% to 75%.

Highlights from this past fiscal year include:

- St. Peter contributed \$216,751 to support our children attending area Catholic Schools.
- The Parish donated \$179,975 to the Diocesan Support Appeal.
- The Parish donated \$37,847 to the Priest Retirement Fund.
- The Parish donated \$33,406 to numerous charitable agencies through our second collections.
- The total of all charitable donations and special collections was \$580,360.

I would like to thank the members of the Finance Council for their service...especially their discussion and discernment in making the necessary decisions during our budget process for the upcoming year. They have navigated a path to ensure the Parish’s financial solvency for this coming year while maintaining the ability to support and maintain our programs, staff, and campus. I would also like to thank Fr. Shea and Terrie Morin for their guidance and support of the Finance Council. We look forward to continuing our work with Fr. Tim Stephens and extend a very sincere welcome to him as our pastor.

Gregory Kurts – Chair, July 2020 – June 2021



## St. Peter Financial Dashboard - Fiscal Year 2021

*Mission: Financial Solvency, Growth and Guidance*



### Highlights

#### **Revenue**

Fiscal Year 2021 (July 2020 - June 2021) is \$614,000 above budget.

Fiscal Year 2021 Offertory is 1% above Fiscal Year 2020.

#### **Expense**

Fiscal Year 2021 expenses are \$29,000 below budget and \$145,000 below prior year.

Fiscal Year 2021 lower expenses due to:

Lower than expected payroll and benefits.

Projected equipment repairs/maintenance not needed.

Education/ministry/liturgical supplies/programming changes due to COVID-19.

Utilities lower due to COVID-19.

#### **Capital Improvements for Fiscal Year 2021 were \$38,137**

Master Planning \$18,000

Ignatius House—brick and mortar repairs \$9,800

Ignatius House—exterior window / sill repairs \$2,350

I-Wave units for HVAC Units for Biss Hall, Church, Administrative Building, and the Priest Residence \$7,980



Summer 2020 (top) to Summer 2021 (bottom): attendance increases with the installation of new environmental health systems.



## Income and Expense

	7/1/20 - 6/30/21				
	Actual \$	Budget \$	vs. Budget \$	Prior Year \$	vs. Prior Year \$
Income-Donations	1,794,701	1,200,413	594,288	1,794,953	-252
Income-Fees	92,837	73,067	19,770	76,230	16,607
<b>Total Revenue</b>	<b>1,887,538</b>	<b>1,273,480</b>	<b>614,058</b>	<b>1,871,183</b>	<b>16,355</b>
Expenses	1,572,830	1,602,287	-29,457	1,717,970	-145,139
<b>Net Income</b>	<b>314,708</b>	<b>-328,807</b>	<b>643,515</b>	<b>153,214</b>	<b>161,494</b>
Capital Interest	1,954	2,000	-46	4,588	-2,634
Capital Expenditures	38,137	-	-	-	-
<b>Net Operating Activity</b>	<b>354,799</b>	<b>-326,807</b>	<b>643,469</b>	<b>157,802</b>	<b>158,860</b>
Other Income:					
Income Bequest	-	-	-	26,601	-26,601
Capital Interest	-1,954	-2,000	46	-4,588	2,634
Subsidies - Non-Diocesan	102,448	-	-	-	-
Income FFHL	2,494	-	2,494	7,590	-5,096
<b>Total Other Income</b>	<b>102,988</b>	<b>-2,000</b>	<b>2,540</b>	<b>29,604</b>	<b>-29,063</b>

## Balance Sheet

	6/30/2020	6/30/2021	Year to Date Change
<i>Cash Accounts</i>	\$	\$	\$
Restricted & Designated Cash Accounts	1,480,861	1,651,900	171,040
Non-Restricted Cash Accounts	747,350	974,688	227,338
<b>Total Cash Accounts</b>	<b>2,228,211</b>	<b>2,626,589</b>	<b>398,378</b>
YE 2021 Expense Budget	1,748,721	1,602,287	
Months Operating Reserve*	5.1	7.3	

\*operating reserves are found in both checking and savings accounts



## Report to Parishioners as of June 30, 2021

## Parish Statement of Activities &amp; Cash Flows

	FY2021 Actual	FY2021 Budget	FY2022 Budget
Operating Revenue	\$	\$	\$
Offertory	1,689,259	1,112,664	1,683,681
Unrestricted Donations & Other Support	200,105	83,249	79,819
Fundraising Income	-	-	3,850
Religious Formation Fees	14,370	16,000	14,375
Cemetery/Columbarium Fees	4,100	4,000	4,000
Other Fees & Misc. Income	36,225	49,067	33,376
Total Operating Revenue	1,944,058	1,264,980	1,819,101
Operating Expenses			
Ministry & Liturgy	236,085	254,957	247,593
Religious Formation	124,180	143,518	150,404
Charity / Outreach	95,495	57,040	172,456
School Subsidy	216,751	215,551	250,596
Cemetery/Columbarium Expenses	6,642	700	837
Other Parish Program Expenses	-	600	500
Facilities Expenses	374,073	345,035	366,361
Diocesan Assessments	167,279	167,279	168,529
General & Administrative Expenses	352,298	417,289	387,261
Total Operating Expenses	1,572,802	1,601,969	1,744,537
Net Operating Activity	371,256	(336,989)	74,564
Capital Activity / Other Donations			
Receipts	12,234	6,500	5,850
Expenditures	28	(318)	(318)
Net Capital Activity, excluding debt principal payments	12,206	6,182	5,532
Endowment Earnings, Net of Income Spent	36,188	2,000	-
Restricted Donations (other than capital)			
Received	143,453	-	-
Expended	(21,631)	-	-
Net Restricted Activity (other than capital)	121,822	-	-
Total Surplus (Deficit) Before Depreciation	541,472	(328,807)	80,096
Total Surplus (Deficit) After Depreciation	541,472	(328,807)	80,096
Other Sources and Uses of Cash:			
Deduct increased assets - Equipment/Facilities	(38,137)		
Deduct increased assets - Endowment Accounts	(37,043)		
Deduct decreased liability - Debt Principle	(102,448)		
Add increased - sum of Other Assets & Other Liabilities	609		
Deduct decreased liability - Custodial Obligations & Unearned Income	(3,118)		
Deduct increased assets - Savings/Reserve Balances	(310,438)		
Total Increase (Decrease) in Checking Accounts	50,898		

	Amount:		Amount:
<b>Tithing and Charitable Donations from Fundraising: July 2020 - June 2021</b>	\$	<b>Second Collections and other charitable assistance: July 2020 - June 2021</b>	\$
Assistance League	2,611	Combined Missions	5,164
Care Ring	7,611	Seminary Education	5,372
Catholic Charities: Assistance for referred people	258	National / International Combined Collection	5,241
Center for Community Transitions	2,000	World Mission Sunday	2,294
Charlotte Rescue Mission: Dove's Nest - COVID19 Meals	5,000	Campaign for Human Development	5,524
Circle de Luz	2,000	Religious Retirement Collections	9,811
Community Culinary School (Encore)	2,000	MACS / Catholic School Subsidy	<u>216,751</u>
Diocese of Charlotte - Tribunal (Annulment)	150		<b>250,157</b>
Habitat for Humanity: Funds for 2 house builds	6,000	<b>Other Collections: January 2020 - December 2020</b>	
Hope Haven, Inc.	2,000	Priest Retirement Assessment	37,847
Jesuit Refugee Service	1,000	Diocesan Support Appeal Assessment	<u>179,975</u>
Leah's Hopes & Dreams	3,000		<b><u>217,822</u></b>
Loaves & Fishes	4,917	<b>Total of all Charitable Donations and Second and Other collections:</b>	<b>580,360</b>
Mecklenburg Ministries	1,250		
NC Med Assist	2,000		
Roof Above (Men's Shelter of Charlotte & Urban Ministry): General Funding; monthly meal; Souper Bowl of Caring	30,930		
Safe Alliance	2,000		
St. Peter Programs: Support for homeless and those in need by St. Peter Ministries	12,181		
Supportive Housing /McCreesh Place	10,278		
Thompson Child & Family Focus (A Child's Place)	4,917		
YWCA (Women's housing shelter)	<u>10,278</u>		
	<b>112,381</b>		

#### Get to Know the Newest Charitable Organizations St. Peter Assists

**Leah's Hope & Dreams**, provides homeless communities with resources enabling them to survive and thrive. They offer mobile showers; provide food, toiletries, and clothes to those on the streets once they are released from shelters; provide training for career advancement.

**Roof Above**, formerly Urban Ministry Center and Men's Shelter of Charlotte, an interfaith organization dedicated to bringing the community together to end homelessness. They provide a continuum of services to the homeless—from street outreach and basic services, to emergency shelter and permanent supportive housing.

<b>Parish Statement of Financial Position</b>	<b>6/30/21</b>	<b>7/1/20</b>
<b>Assets</b>	\$	\$
Checking Account Balances - Operating	571,291	545,780
Checking Account Balances - Other	204,754	179,367
Savings Accounts - Operating Reserves	403,397	201,570
Savings Accounts - Restricted	1,315,117	1,206,506
Endowment Accounts	132,030	94,987
Receivables and other Current Assets	4,889	4,437
Property, Plant, and Equipment	<u>6,388,220</u>	<u>6,350,082</u>
<b>Total Assets</b>	<b>9,019,697</b>	<b>8,582,730</b>
<b>Liabilities and Net Assets</b>		
<b>Liabilities</b>		
Accounts Payable and Accrued Expenses	22,819	21,758
Custodial Obligations	13,329	15,031
Loan Payable - PPP	-	102,448
Other Liabilities	<u>144,414</u>	<u>145,830</u>
<b>Total Liabilities</b>	<b>180,562</b>	<b>285,067</b>
<b>Net Assets</b>	<u><b>8,839,135</b></u>	<u><b>8,297,663</b></u>
<b>Total Liabilities and Net Assets</b>	<b>9,019,697</b>	<b>8,582,730</b>



## Ignatian Spirituality and Formation

We are grateful to our parishioners, volunteers and staff who adapted our spiritual and faith formation programs during the last year. The parish provided the ability to meet virtually for the benefit of all.

Ignatian Spirituality emphasizes finding God in our ordinary experience, discerning God's will in our lives, and living as disciples of Jesus committed to a faith that does justice. Ignatian spirituality is at the heart of St. Peter and the lens through which we design faith formation programs. All are designed to foster prayer, graced decision making and an active life of service to others, especially the poor and marginalized.

Here are some of our distinctive formation programs:

### **Catechesis of the Good Shepherd —**

The CGS curriculum for Preschool - 6th grade youth is rooted in the Bible, the liturgy of the Church, and the educational principles of Maria Montessori. Each level consists of developmentally appropriate materials..

### **Teen Service Week —**

The purpose of this summer week of service is to go forth and be with those who live on the margins, build community among our parish teens, and deepen each person's relationship with Christ.

### **Catholic Social Teaching Series —**

Based on the United State Catholic Conference of Bishops principles of Catholic Social Doctrine and Faithful Citizenship.

### **The Ignatian Prayer of the Daily Examen —**

The Examen is a daily prayer of honest self-assessment and reflection and is a founding principle of Ignatian spirituality. The workshop meets over five weeks to learn and practice this prayer.

### **Advent and Lenten Virtual Retreats —**

Saturday morning Ignatian Spirituality retreats that combine a guided reflection on the theme of the liturgical season, a guided group meditation of imaginative contemplative prayer, private meditation and paired participant sharing.

### **Care for Creation Spiritual Retreats —**

Responding to Pope Francis' call to an integral ecology, the parish Care for Creation committee fosters a spiritual and practical response to our connection to God's creation. We join the Jesuits worldwide in confronting the degradation of our environment and living conditions, especially effecting the poor.

### **Individual Spiritual Direction —**

For those who pray regularly and want to share their journey with a spiritual companion. Spiritual direction is a proven way to grow in your relationship with God.

### **Ignatian Encounter: Encountering the Living God —**

An eight-week Individually Directed Retreat with a Spiritual Director for those who want to experience God's presence and activity in one's life.

### **Everyday Discernment: An Ignatian Approach to Understanding God's Will —**

Based on the insights of St. Ignatius, this workshop focuses on how to recognize God in our decision making.

### **The Spiritual Exercises in Daily Life —**

The Spiritual Exercises are a compilation of meditations, prayers, and contemplative practices developed by St. Ignatius to help people deepen their relationship with God. Directed on an individual basis or in a small group.

### **After The Spiritual Exercises —**

For those who have completed the Spiritual Exercises to gather in a community of shared experience and to deepen their journey with God.



**St. Peter Catholic Church**

*The Jesuit Church in Charlotte's Center City*

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[www.stpetercatholic.org](http://www.stpetercatholic.org)