



**PEACE RIVER PRESBYTERY
STATED MEETING DOCKET
FIRST PRESBYTERIAN CHURCH
ARCADIA, FL
MAY 14, 2026**



PROPHETIC IMAGINATION

9:00 am	Opening Prayer	Vice-Moderator, Steven Dear
	Hymn #559	<i>Here I Am, Lord</i>
	Greetings from Host Church	Will Browne
	Report of the Stated Clerk	Randy Moody
	Report of the General Presbyter	Melana Scruggs
	Committee on Preparation for Ministry Report	Terri Jo Crego
	Committee on Ministry Report	Pam Masten
	Steering Committee Report	Rob Marrow
	Human Resource Committee Report	Mitzi McGavie
	Communication, Connection, Community Committee	Julia Piermont
	Finance Committee Report	Kevin Morris
	Report of the Treasurer	Wilson Wheeler
	Presbyterian Foundation	Dana Waters
	General Assembly Preview	Randy Moody
	Misión Peniel Report	Miguel Estrada
	Beth-El Mission	Teresita Post-Matos
	Cedarkirk Camp & Conference Center Report	Matt Schick
	FLAPDAN	Rachel Martin
	Hymn #614	<i>Let There Be Peace on Earth</i>
	Closing Prayer for Business	Vice-Moderator, Steven Dear
11:00 am	Worship including Celebration of the Lord's Supper	
	Preacher: Rev. Dana Waters, Ministry Relations Officer, Presbyterian Foundation	
	Offering Recipient: Beth-El Mission (<i>Payable to First Presbyterian Church, memo: Beth-El</i>)	
12:00 pm	Lunch and Fellowship	
12:45 pm	Continuation of Business, if required	

Peace River Presbytery Stated Meeting, May 14, 2026
Stated Clerk's Report

1. Approval of Docket
2. Appointment of Temporary Clerks
3. Seating Corresponding Members
4. Members of Presbytery who requested to be excused
5. Administrative Commissions
 - The commission to ordain Carson Brown and install him as Associate Pastor at First Presbyterian Church, Bonita Springs completed its work Sunday, March 29.
6. **Motion:** Presbytery authorize the Moderator, General Presbyter and Stated Clerk to read and approve the minutes of this meeting.

Committee on Preparation for Ministry Report
Stated Meeting, May 14, 2026

Inquirers under care:

- Rachel Mallet – Church of the Palms, Sarasota

Candidates under care:

- Amy Cerniglia (Certified Ready for a Call) – Peace Presbyterian Church

Motion:

The Committee on Preparation for Ministry moves that Kelly Marie Henry-Herbst, having been endorsed by the Session of Faith Presbyterian Church- Cape Coral and the CPM of Peace River Presbytery, be approved as an Inquirer under care of the Presbytery.

Note:

G-2.0103 Call to Ordered Ministry

The call to ordered ministry in the Church is the act of the triune God. This call is evidenced by the movement of the Holy Spirit in the individual conscience, the approval of a community of God's people, and the concurring judgment of a council of the Church.

G-2.0603 Purpose of Inquiry

*The purpose of the inquiry phase is to provide an opportunity for the church and those who believe themselves called to ordered ministry as **ministers of the Word and Sacrament to explore that call** together so that the presbytery can make an informed decision about the inquirer's suitability for ordered ministry.*

G-2.0604 Purpose of Candidacy

The purpose of the candidacy phase is to provide for the full preparation of persons to serve the church as ministers of the Word and Sacrament. This shall be accomplished through the presbytery's support, guidance, and evaluation of a candidate's fitness and readiness for a call to ministry requiring ordination

When individuals who have been endorsed by a session and CPM are presented before the presbytery for examination, questions should be limited to the biographical statement of faith and their sense of call.

Faith Journey Statement Kelly Henry-Herbst

“You don’t have to do this,” my mother said to me. We were sitting in the pews at St. Giles Presbyterian Church in Greenville, South Carolina, and I was in 8th grade and facing the question of Confirmation. Did I want to take confirmation classes, or did I want to attend regular middle school Sunday School? I knew the answer, without hesitation, and I was never sure of anything growing up, so the idea of *knowing* something overwhelmed me. God wanted me for the church. I don’t know how I knew, but I *knew*. I started to cry. My mother, as supportive as she always was, misread my emotion and gave me an out.

In high school, I was in church a minimum of four days a week. I went on every mission trip, volunteered for every service project, threw myself into every aspect of church that I could. I read my Bible, prayed throughout my day, and tried to remember God in everything I did. I knew that the church was where I was supposed to be. Then, three years later, at the tender age of sixteen, I realized something about myself: I was attracted to women. I didn’t fully live my truth for two years after this, but people talked and suddenly I found myself very, very alone. The church families I had created over the last five years suddenly dissolved. No one said it outright, but I wasn’t welcome. LGBT people were not welcome in God’s home.

The next two decades were spent moving through various religious and spiritual faith pathways. I eventually settled into an Earth-centered religious practice and threw myself into studying science and education. The feeling of call into ministry never faded, but when I looked into seminaries for the Unitarian Universalist church, or the Unity church, or even Earth-centered faith practices, a little voice in the back of my head kept saying, “No. Not this one. Not yet.”

I became a teacher. I got married. We adopted two teens and lost two pregnancies and an embryo before everything I thought I knew shattered and a desperate cry to God shifted the entire direction of my life.

It took two more years before I was able to say it out loud: I wanted to go back to the Presbyterian church. I discussed it with my wife, and we decided I would go alone. It took three weeks before I could convince her to come with me, but she did. It was another couple of months, but when Pastor Gillian Weighton was installed, we sat in the pews watching.

Erin looked at me, “You’re thinking about it again.”

“About what?” I asked, playing dumb. I knew exactly what my wife was reading.

“About ministry. About seminary. You’re practically screaming it. You should talk to Pastor Gillian. Just send her an e-mail.”

I chewed on my lip. Then the ever-present little voice in the back of my head spoke up, “Yes, now. Now is the time. You’ve come home, now go.”

I e-mailed Pastor Gillian that night. We met for coffee a week later, and the process has been in motion ever since.

“You don’t have to do this,” my mother had said to me all those years ago.

Yes, I do believe that I do.

Committee on Ministry Report

Stated Meeting, May 14, 2026

We welcome:

Rev. Dr. Brad Clayton transferred from Florida Presbytery as Pastor/Head of Staff at Church of the Palms.

We recognize the new relationships:

Rev. Carson Brown was ordained as a Teaching Elder, also known as a minister of the Word and Sacrament, on March 29 and began ministry as an Associate Pastor at First Presbyterian, Bonita Springs, effective March 30, 2026.

We celebrate retirement:

Certified Christian Educator Deborah Wendell, Pine Shores, retired May 1 after 50 years of children's ministry.

We celebrate transition:

Presbyterian Church of the Covenant, Sarasota, is now Trailside Community Church, effective April 5, 2026.

Motions:

COM moves Peace River Presbytery commission RE Bill Kraft, who has completed the Commissioned Lay Pastor program at Dubuque, to limited pastoral service at First Presbyterian Church, Lehigh Acres, with authority to moderate the session/congregational meetings, administer the sacraments, and perform weddings of congregants; TE Brad Rogers to serve as mentor/supervisor.

Rationale: First, Lehigh has been without a pastor several years. The session believes he is a good fit to lead the congregation into the next season of ministry.

COM moves Peace River Presbytery recognize the ordination of Rev. Silvio Esteves in the Presbyterian Church of Canada and enroll him as a member of Peace River Presbytery according to provisions of G-2.0505.

Rationale: Rev. Esteves was ordained by the Presbytery of Kingston (PCC) in February 2021 shortly after he graduated seminary. He was enrolled as a Temporary Member of Peace River Presbytery in 2023 when he began serving First Presbyterian Church of Port Charlotte and wishes to be installed.

For information, only:

March 10, 2026

- Transferred TE Alan Adams to Shenandoah Presbytery.
- Approved ordination and installation commission for Carson Brown and First Bonita Springs per PRP approval February 19, 2026.
- Approve extension of Bridge Pastor contract between TE Bill Sitterly and Pine Shores PC Approve extension of Bridge Pastor contract between TE Bill Sitterly and Pine Shores PC.

- Authorized Pine Shores PC to elect a Designated Pastor Nominating Committee.
- Approved the MDP from Peace as presented.
- Granted permission for Burnt Store PC, Punta Gorda, to elect an Associate Pastor Nominating Committee.
- Endorsed the name change of Presbyterian Church of the Covenant to Trailside Community Church.

April 14, 2026

- Approved temporary pastor contract between TE Church Wiggins and Palmetto Presbyterian Church.
- Approved interim pastor contract between TE Bill Sitterly and Pine Shores Presbyterian Church.
- Voted to not publish ministers' terms of call; the stated clerk can provide congregations effective salaries of ministers serving similar size congregations when appropriate upon request.

Bill Kraft Statement of Faith

I believe and trust in the holy, sovereign God. I believe that God is a triune God whose trinity is manifest in God the Father, in Jesus Christ His only begotten Son, and in the Holy Spirit. I believe Jesus Christ came to earth fully human and fully God to serve the Father and to take on my sin as well as the sins of those who repent and believe in Him. I believe that Jesus was conceived by the Holy Spirit, born of the Virgin Mary and that He lived a sinless life. I believe that Jesus was unjustly condemned by men and was crucified, died, was buried, descended into hell, and then left an empty tomb and arose from the dead to offer eternal life. I believe He will return.

I believe that God is the Creator who created and loves each of us as He created us all in His image. I know I have sinned against God and that the only path to forgiveness is repentance and belief in Jesus Christ, my Lord. I believe God is loving, gracious, and merciful and that He looks upon me as one of His children. I believe that God wants us to love one another. I believe that salvation is by faith, alone, and is a gift from God.

I believe that Scripture is the inspired Word of God and the authoritative witness to Jesus Christ.

I believe that the Holy Spirit resides in me and in all who believe in Jesus Christ and that the Holy Spirit is my comforter and my guide to the will of God.

I believe that the church is a living entity that functions as the hands and feet of Christ, acting and working as a community of faith, hope, love, and witness to the good news of God's grace in Jesus Christ.

Curriculum Vitae C. William (Bill) Kraft, III

. Bill Kraft grew up on a farm in Pennsylvania, received a B.A. from the University of Pennsylvania, a *Juris Doctor* from Villanova University Law School, and a "mini-MBA" from Harvard. He tried lawsuits ranging from first degree murder defense to medical malpractice, air

crash, and railroad injury, as well as contract matters. He served as Regional General Counsel to a Fortune 100 company, served as an elected Township Supervisor in Pennsylvania, and was president of a resort in Princeville, Kauai. After 30 plus years of trying cases, Bill and his first wife (since deceased) operated a photo processing and portrait franchise for 3 years and thereafter, Bill began trading stock and options, lectured around the country on trading, and has authored two books on the subject.

Before moving to Florida, Bill served as a volunteer Victim's Advocate for the Jefferson County, Colorado Sheriff's Department. In 2015, after a life altering experience, Bill gave his life to the Lord. He and Patti joined Community Presbyterian Church in Englewood, Florida where both served as deacons and Bill has served as an elder on Session, and as president of the corporation. Bill underwent Stephen Minister basic and leadership training and has provided pastoral care to the congregation at Community. In response to God's call, Bill completed online courses at Union Theological Seminary under the guidance of the Presbytery's Committee on Ministry and is trained as a Commissioned Ruling Elder.

At Community, Bill has served on the finance, generosity, and mission and outreach committees, as well as on their Pastor Nominating Committee. At the Presbytery level, he was a member and co-moderator of the Committee on Ministry and is currently a member of the Human Resources Committee.

Bill and Patti met on a cruise ship in Ketchikan, Alaska and Bill fell in love at first sight. They were married on their sixth date and just celebrated their 27th anniversary. Bill has two grown children from his first marriage, one in Colorado and one in the Florida Panhandle, and has two spectacular grandchildren. Beyond his commitment to Jesus, he enjoys photography, fly-fishing, golf, travel, and dogs. Trader is his 31st dog.

Rev. Silvio "Syl" Esteves Statement of Faith

The faith I confess is in God the Father, God the Son, and God the Holy Spirit – one God in three persons. I confess Jesus Christ as the long-awaited Jewish Messiah as my Lord and the Savior of my soul. I see Jesus as the only sure hope for our broken world.

I subscribe to the Ancient and Ecumenical creeds of the Christian faith, especially the Nicene and the Apostles' Creeds. I also affirm the subordinate standards of the Reformed Tradition (The Scots Confession of 1560, The Second Helvetic Confession of 1561, The Heidelberg Catechism of 1563, and The Westminster's Confession, Shorter and Larger Catechism of 1647). Although I believe that some of the answers within a product of the time it was written. I also read and find no issue with the Theological Declaration of Barmen of 1934 or the Confession of 1967. I am also in agreement with PC(USA) A Brief Statement of Faith of 1991 and the Confession of Belhar of 2016.

I also believe I am called to proclaim the Good News of Jesus. At the same time, I hope to invite and help people to learn Jesus' teachings, urging them to observe His instructions. I believe we all need to acknowledge our sinful state and to repent from it. I believe we can rest on the assurance of salvation brought by the Lamb of God to the world.

As a Minister of the Word and Sacraments, I desire to continue the work initiated by the apostles, and to care for the community of the faithful in Port Charlotte, FL. Also, to welcome everyone who wants to hear the Gospel, regardless of their nationality, ethnicity, race, background, age, social status, sexual orientation or gender identity. All I want is to watch over and care for the piece of Christ's holy church entrusted to me, to the best of my abilities and with God's help.

Finally, I love being a Presbyterian, our tenets and the ways we do things. I believe God speaks to the church and through the majority, and I have no desire to take divisive stances, especially concerning the gender debates.

Rev. Silvio “Syl” Esteves Short Bio

Pastor Syl – whose name sounds like the first syllable of “Silver” – is an ordained minister of the Presbyterian Church in Canada, originally from Brazil. As the grandson of Spaniards, he holds dual citizenship in both Brazil (by birthright) and Spain (by bloodline).

- Family: Syl is married to Betania (pronounced like “Bethany” with an “a” at the end). Together they have two sons: Gabe, who is turning 28, and Pedro, who recently turned 24. Syl also has a daughter, Agnes (33), who lives in Canada.

- A Life Well Traveled: Syl and Betania have lived in many places across the Americas. In Brazil, they called the southern state of Paraná home. Their journey through the United States took them to Idaho, Colorado, Georgia, and now Florida. They also spent time in Canada, both in the French-speaking side and in Ontario, one of the English-speaking provinces.

- Before the Pulpit: Before entering ministry, Pastor Syl built a diverse professional background, working in the pharmacy, hospitality, banking, postal services, and the call center industries.

- Education: Syl's academic journey is as well-traveled as his life. He began his Master of Divinity studies at Columbia Theological Seminary (PC USA) in Decatur, Georgia, then continued at the prestigious McGill University and the Presbyterian College in Montreal, where he received his M. Div. Along the way, he also earned a lay-leadership certificate from the Presbytery of Atlanta and a certificate from the Haggai Institute of Christian Leadership, in Maui, Hawaii. He later pursued a Master of Theology in New Testament at Tyndale University in Toronto, focusing his research on the Afterlife.

- Life in Port Charlotte: Syl and Betania love taking long walks and meeting new people. They share a passion for Mexican and Italian food – and, above all, for Jesus. They are grateful to be in Port Charlotte, and look forward to growing in Christ alongside a community that has already meant so much to them.

Peace River Presbytery
Steering Committee Report
May 14, 2026

The FLAPDAN Covenant Agreement expired December 31, 2024 and FLAPDAN did not propose a renewal agreement until February 26, 2026. The committee reviewed the proposal and has no recommendation to presbytery at this time pending further examination and investigation.

The committee authorized the Stated Clerk to finalize the dates and locations for 2027 Stated Meetings of Peace River Presbytery.

**Peace River Presbytery
Human Resources Committee Report
Stated Meeting, May 14, 2026
First Presbyterian Church of Arcadia**

For Presbytery Approval:

1. The Human Resources Committee nominates the following:

Communication, Connection, Community:

Conor Peters TE, Church of the Palms, Class of 2027-1 (Partial term)

Committee on Ministry:

Larry Cristman RE, The Community Church Babcock Ranch, Class of 2028-1

Florida Presbyterian Disaster Assistance Network (FLAPDAN):

Eric Robinson RE, First Sarasota, Class of 2028-2

Permanent Judicial Commission:

Bill Kraft RE, Community Englewood, Class of 2031

Rob Marrow TE. Vamderbilt Napes, Class of 2031

2. The Human Resources Committee moves that Randy Moody be paid \$3,000 per month To fill in for Melana while she is on sabbatical. If emergencies arise requiring excessive workload, additional compensation will be reviewed.
3. The Human Resources Committee will perform reviews in conjunction with salary reviews.

Peace River Presbytery
Communications, Connections, and Community Committee
May 14, 2026 Stated Meeting of Presbytery

Information Only:

- Rev. Jaco Besto, Pastor of Burnt Store Presbyterian Church, will share with the presbytery today regarding the difference that receiving a \$55,000.00 from the new Viability Grant program is making for their congregation's mission and ministry.
- Since our last report to presbytery (at the 10/18/2025 meeting), the CCC Committee has met by Zoom five times (11/4/2025, 12/2/2025, 2/3/2026, 3/3/2026, and 4/14/2026).
- Grants awarded:
 - From the Chapel Brachman Music Fund (designated for "purchase of music composed and published before 1938, and for classical oratorio scores"):
 - \$1,000 to Presbyterian Church of the Covenant/Sarasota for the purchase of hymn slides for hymns composed and published before 1938.
 - \$1,084 to Burnt Store Presbyterian Church for the purchase of music for a presentation of Handel's *Messiah* during the Lent/Easter season. This grant came with a stipulation that acknowledgment of Peace River Presbytery appear in the program.
 - \$450 to Siesta Key Chapel for music purchased for a "Palm Sunday Community Concert," offered in coordination with Westcoast Black Theatre Troupe (WBTT), featuring the 1920s and 1930s music of Thomas Andrew Dorsey.
 - From a fund designated to send Presbyterian women to events regarding women:
 - \$2,000 to Serena Dowling, member of Moorings P.C, Naples, and a student at Stetson University, to meet expenses associated with serving as a part of PC(USA) delegation at the 70th Session of the United Nations Commission on the Status of Women at the United Nations in March.
- At our December 2025 meeting, Stated Clerk Randy Moody reported that the agreement had been reached between Peace River Presbytery and The Florida-Bahamas Synod of the ELCA and documentation signed officially establishing the Community Church (Babcock Ranch) as a congregation of the PC(USA and ELCA.
- At our April 2026 meeting, we received an orientation to the new **Viability Grant** from Jay Mumper and Janice Crowley (members of the original committee). Materials are available now for the next grant cycle. **The deadline for applications is October 15, 2026.**

Respectfully submitted,
Julia Wharff Piermont, Moderator

Finance Committee Report

May 14, 2026

In February, the committee met in person with our New Covenant Trust Company investment advisors to receive a review of investments. Because of the presbytery investment relationship, Peace River Presbytery congregations who invest with NCTC enjoy a unique relationship reducing fees. Strong gains received in the last ten years can't be expected to continue indefinitely and we are working closely with our investment advisors.

Having received the corpus of the Lovell Estate Settlement funds from the required Schwab brokerage account opened to meet IRS reporting requirements, the committee voted to request a check for the last dividends recently deposited and close the account. An additional \$10,000.00, separate from investments received, is anticipated. A working group is developing a proposal for distribution and management of this Retired Pastor Fund within the donor restrictions.

The Deibert house, in which presbytery had an equity share in her terms of call, sold. The presbytery received \$204,775.51 according to the agreement which is now satisfied.

Reviewing the Financial Policies document, it was noted that several edits are required primarily to conform with previous presbytery actions, depleted funds, and Standing Rules.

MOTION: Peace River Presbytery approve the updates highlighted in the attached 2026 Financial Policies document.

Recent financial statements are posted on the presbytery website adjacent to this meeting packet for your review. Thank you for financially supporting the ministry of Peace River Presbytery. We recognize that donations from several congregations arrived shortly after March 25 which is the date the financial month was closed; some congregational giving is not yet reflected in this report.

Proposed

Peace River Presbytery

Presbyterian Church (USA)

Financial Policies

*Procedures have been placed in an expanded document of procedures and record keeping information,
were approved by the Finance Committee on March 18, 2026
and are available on request from the Treasurer*

Former Version of Financial Policies
Approved by Peace River Presbytery February 22, 2024
Policy Approved by Peace River Presbytery February 20, 2025
Policy Approved by Peace River Presbytery TBD

Purpose

These Policies and the companion procedures and record keeping information are to ensure Peace River Presbytery's (Presbytery or Presbyteries) assets and financial operations are protected, managed and controlled using financial reports produced accurately and on a timely basis.

Organization

The Presbytery finance organization is comprised of the following areas:

Finance Committee is responsible for:

- Creating investment policies including investment goals and allocations
- Recommending an investment management firm(s)
- Reviewing the investment performance
- Developing, modifying and recommending the financial policies to the Presbytery
- Reviewing, recommending and presenting collating and presenting the Presbytery's annual budget to the Presbytery
- Reviewing, co-signing or denying church loans
- Ensuring, with the Treasurer, the Presbytery's finances are properly controlled and accurate
- Approving an independent public accounting firm for reviews/audits
- Reviewing and accepting the annual financial review or audit
- Assisting member churches with their financial matters, as requested

Treasurer is responsible for:

- Coordinating the financial operations of the Presbytery
- Providing guidance to the Finance Committee and the General Presbyter
- Insuring, with the Finance Committee, the Presbytery's finances are properly controlled and accurate
- Managing the annual budget process
- Retrieving all mail, including financial related items
- Receiving, recording and depositing all receipts
- Preparing non-recurring checks for signature by an authorized signor (s)
- Forwarding investment statements to Accounting Services

Accounting Services is responsible for:

- Updating the Presbytery's financial records
- Maintaining the financial systems
- Paying the Presbytery's invoices
- Reconciling bank statements monthly
- Recording and filing all investment statements, confirmations and reports
- Creating the monthly financial reports
- Responding to request for information, e.g. audit, insurance, etc.
- Maintaining log-in and password information
- Preparing Federal Payroll Tax reporting and Federal Tax Exempt Status filing

General Presbyter who is responsible for:

- Overseeing the financial organization.
- Forwarding all invoices to Accounting Services
- Conducting background checks for those subject to the Financial Policy
- Making the Finance Committee aware of General Presbyter activities as they relate to financial matters.
- Coordinating activities between congregations, the Committee on Ministry, the Stated Clerk of the Presbytery, and the Finance Committee

If the Treasurer is not able to fulfill his or her responsibilities within the scope of these policies, the Steering Committee shall appoint a Treasurer Pro-Tem who shall serve until a new Treasurer, nominated by the Human Resources Committee, is approved by the Presbytery.

If the General Presbyter is unable to fulfill his or her responsibilities within the scope of these policies, the Stated Clerk may act on their behalf until the situation is resolved.

Responsibilities

The Finance Committee, Treasurer, and General Presbyter are responsible for reviewing and assuring compliance with these policies and procedures.

These policies and any changes shall be prepared for presentation to the Presbytery for approval after informing the Steering Committee.

The Finance Committee may select and contract for the services of an independent accounting firm to provide such financial accounting and services as deemed necessary.

Audits and Reviews: Finance Committee, working with the Treasurer, will contract with an independent Public Accounting firm to do a review each year for two (2) years and an audit on the third year, or whenever there is a change in financial management/oversight.

Insurance: Maintain the following insurance coverage: employee theft coverage, forgery and alterations coverage, outside theft coverage in the amount of \$1 million.

The Presbytery shall maintain adequate liability insurance for its officers and directors.

Background Checks: Conduct background checks for the General Presbyter, Treasurer, and anyone else directly involved in handling funds, every three (3) years.

Gifts as Described Below

The Presbytery reserves the right to decline any gift. The disposition of securities, land or property described below, donated to the Presbytery shall come to the Presbytery as a recommendation from the Finance Committee.

Definition of Terms:

Restricted Funds – Any restricted fund contains donor-restricted money that is earmarked for specific stated purposes.

Designated Funds – Any designated funds contain money that has been designated by action of the Presbytery. All Presbytery-designated funds can be redirected at any time.

Receiving Donor-Restricted Funds. A permanent record shall be kept of funds received by the Presbytery that have a restriction on their use. The record should include the Fund Name, Date, Value, Donor Name, and any special instructions that might accompany it. If funds are not used for the restricted purpose within five years, the Presbytery will contact the donor (or heir) for permission to redirect the money. If the donor or heir is not available to be consulted, the Presbytery reserves the right to apply the principles of the cy pres doctrine. ('Cy pres,' a French term for 'as near as may be,' has been incorporated in the Florida Trust Code, in section 736.0413 Florida Statutes [2018]).

Any monies restricted for a named covenant partner will be forwarded in a timely manner, ordinarily within 60 days.

Presbytery-designated funds will be used in accordance with Presbytery action. In the case of a Presbytery-designated offering funds are to be forwarded to the designated covenant partner in a timely manner, ordinarily within 60 days.

Unrestricted Estate Gifts will be directed as follows:

10% to be distributed to current mission partners in proportion to their budgeted amount in the then current year's Presbytery budget.

90% to be added to the Presbytery's undesignated funds.

Publicly Traded Securities: Publicly-traded securities will be sold as soon as is reasonably practical. The gift value of securities is determined by the date the securities are "booked" into the investment account.

Gifts of Life Insurance: The Presbytery will accept gifts of life insurance as outright gifts or deferred gifts.

- 1) Gifts can be made by giving existing policies, by change of beneficiary, or by purchasing new insurance.
- 2) The Presbytery never recommends agents or agencies and never endorses insurance programs.

Gifts of Real Property: There are benefits to using real property as an expression of stewardship. However, real property is also the most difficult to liquidate. Therefore, certain steps and precautions are necessary to make such a gift transaction complete. The Finance Committee, in consultation with the Steering Committee, will determine the timing of the property sale. The following steps are intended to make such a transaction as beneficial to all parties as possible.

- 1) All gifts of real property will require a title policy, a survey, and evidence that the property is free from environmental hazards. An Environmental (EPA) Level I Inspection is required. An Environmental Waiver is required at both the time of receipt and sale of the property. The Presbytery reserves the right to decline the gift of real property if an Environmental Waiver is not received.
- 2) The donor is responsible for establishing the value of property donated to the Presbytery. The Presbytery staff or officers will notify the donor and his/her counsel in writing about the requirements of the Internal Revenue Code for a qualified appraisal. The Presbytery will provide Form 8283 to the donor, upon request.

According to IRS guidelines, for the purpose of valuing the gift, an appraisal by a certified appraiser must be obtained no earlier than 60 days prior to the date of the gift, and no later than the due date of the return on which the contribution is first claimed as a deduction. Form 8283 will be provided to the donor upon request. Form 8282 will be filed with the IRS on a timely basis, if the property is sold within two years.

- 3) Gifts of real property will be sold as soon as practical, unless the property is determined to have significant potential increase in value and is producing income sufficient to pay taxes, insurance, and any other costs related to the property.
- 4) Gifts of real property must have a clear title, including current leaseholds, and evidence of marketability or adequate income to meet any expenses involved with receipt and/or disposition of same.
- 5) Donor must guarantee taxes, insurance, legal, and other expenses, until liquidation, unless the property has adequate income to support these expenses.
- 6) Donor will be informed that the value of the gift will be based on the sales price, reduced by sales commissions, taxes, legal, and other expenses at the time of sale of the property.

Gifts of Tangible Personal Property: Gifts of tangible personal property will be considered and received by Presbytery on an individual basis. The donor is responsible for establishing the value of tangible personal property donated to the Presbytery. Gifts of tangible personal property will be sold as soon as is reasonably practical.

Life Income Gifts: Life income gifts, such as Charitable Gift Annuities and Charitable Remainder Trusts, will be administered by one of the denominational foundations.

Procedures and Record Keeping

Procedures and record keeping matters related to specific accounting record keeping, financial management, annual budget, receipts, disbursements, payroll, banking, investment posting, distribution practices of designated memorial funds, allocation of undesignated mission and record retention are documented in a Financial Procedures and Record Keeping document, reviewed annually by the Finance Committee, and available from the Treasurer, Finance Committee moderator or General Presbyter.

Investment Policy

Purpose: The purpose of this policy is to establish clear responsibility and authority with guidelines and goals for funds not being used for current expenditures of Peace River Presbytery. This investment policy may be revised and updated by Presbytery.

Goals:

- To preserve and grow Presbytery funds through approved investments and defined asset allocation.
- To provide conservative-to-moderate return on invested funds.
- To provide adequate liquidity to meet normal and extraordinary cash needs.
- To suggest ways the funds can be used to achieve the Presbytery's goals.

Responsibility and authority: The Finance Committee, with the support of the Treasurer, will research and recommend a qualified investment management firm(s). Periodically, generally every 4-6 years, the Finance Committee may conduct a Request For Proposal process to better understand market offerings and in doing so, recommend the best investment management firm to Peace River Presbytery. The selection will be approved by Presbytery. The investments shall be made by the Presbytery's Finance Committee within the constraints of this policy and shared with Steering Committee.

Guidelines: The Finance Committee shall share with the Steering Committee and provide to Presbytery at its stated meetings reports showing the receipts, disbursements and market adjustments for the Presbytery's investments.

The Presbytery shall be guided, but not bound, by investment recommendations of all agencies of the PC(USA), in consideration of the social impacts of particular investments and strategies, thus directing the investment advisors to use a socially responsible screen in selecting investments for the portfolio.

Risk Tolerance: The Finance Committee recognizes that, over the long term, the risk of owning equities has been, and is expected to continue to be, rewarded with a relatively greater return than what has been historically available from fixed income investments. The role of fixed income investments is to reduce the volatility of the overall portfolio, while providing a predictable stream of income or investment gains.

- Generally, the asset allocation shall be equities at 50-70% and fixed income at 30-50%, with the following targets: equities – 60%, fixed income – 38%, cash/money market account – 2%, affirming the importance of diversification across all asset classes and sectors to reduce risk. New Covenant Trust Company (NCTC) shall be responsible for managing the portfolio within the asset allocation ranges and ensure that no single investment or asset class holds an oversized percentage of the portfolio.
- Target allocation with a 7% rebalancing trigger to ensure that asset classes remain within policy and are not deviating from the targets.

- The investment performance will be measured against the following benchmarks:
 US Equities: Russell 3000 Index
 International Equities: MSCI ACWI except USA
 Bonds: Bloomberg AGG Bond Index
 Money Market: 90 Day T-Bill

Approved Investment Vehicles:

Short term vehicles (one year or less)

- Certificates of Deposit
- Insured Money Market Accounts
- U.S. Treasury Notes

Long Term Vehicles (more than one year)

- Presbyterian Foundation Funds
- Presbyterian Loan and Investment Funds
- Exchange Traded Funds for: S&P 500, Dow Jones Industrial Average, Nasdaq
- Publicly Traded Equities and Mutual Funds
- U.S. Treasury Notes and Bonds
- Bonds must be rated investment grade

The Finance Committee will propose new investment vehicles and shall have prior approval of the Presbytery

Governance Reporting and Communication:

The Finance Committee shall meet with NCTC representatives to review investment performance at least on a semi-annual basis, either in-person, or via ZOOM. On a quarterly basis NCTC will provide a written summary comparing investment performance to benchmarks. If the Finance Committee deems it appropriate to schedule NCTC representatives for a ZOOM meeting to review that performance, an order of the day will be scheduled during a stated meeting time of the Finance Committee.

Spending Formula: Peace River Presbytery manages one investment account, with several sub-accounts designated for distribution as:

- 1) ~~Blessing Grant (Presbytery designated)~~
- 2) Viability Grant (Presbytery designated) – consolidation of Blessing and Chapel Legacy
- 3) ~~Church Development (Donor restricted) – depleted with distribution to Babcock Ranch~~
- 4) ~~Chapel by the Sea Legacy – Presbytery designated)~~
- 5) Unrestricted/General
- 6) Retired Pastor Fund (Carol Lovell Estate)

The spending formula shall be applied to investment sub accounts for ~~Blessing, Chapel~~ the Viability Grant and Unrestricted/General. There is no spending formula restriction for the Retired Pastor Fund ~~Church Development Fund.~~

To calculate the Spending Formula, the average account market value as reported on quarterly account statements for the previous 12 quarters shall be multiplied by 4%. In the event there are not 12 quarters worth of account market value history, the average account market value for as many quarters possible should be used.

For the accounts limited by the spending formula that calculation will be made after the first quarter investment account reports are available. The Finance Committee will review the calculations and declare the distribution.

The amount available for **Blessing Viability** Grant distribution will be posted on the Presbytery's website as available for the next cycle of **Blessing Viability** Grant applications.

The amount available from the undesignated/unrestricted account will be available to supplement revenues for any of the three streams of revenue for Peace River Presbytery as the budget is prepared for the upcoming year.

Whenever funds are drawn from any of the sub-accounts it will not impact the balance of the other sub-accounts. Future investment account gains or losses will be properly allocated to the sub-account by NCTC and reported by Accounting Services on the Presbytery's Funds and Accounts report..

If the distribution amounts from any of the sub-accounts are not needed for their designated purpose, the funds will be retained in the investment account.

Access to Investment Account Information: Only the Treasurer, General Presbyter, Accounting Services provider and Finance Committee Moderator will have online access to investment account information. The Treasurer is the only individual authorized to move money from the investment accounts within the parameters described in the banking section of the Financial Procedures and Record Keeping document. The President of Peace River Presbytery, Inc. will have authority to access these funds if the Treasurer is not available.

Sale of Assets Policy

Any and all assets resulting from the dissolution of any congregation within the Presbytery, including, but not limited to, the net proceeds of sale of real and/or tangible and intangible property, personal property, bank accounts, pledges received, securities and other investments, cash on hand, and notes and loans receivable, shall be used and distributed as determined by the Presbytery, upon recommendation from the Finance Committee, in keeping with the values and priorities of the Presbytery.

Official signatories for the sale of property will be the President of Peace River Presbytery, Inc. and the Treasurer.

The Finance Committee, in making its recommendation for the use of such assets, and the Presbytery, in acting on such recommendation, shall give priority to the Presbytery's current mission and ministry priorities.

Consideration should also be given to the wishes of the dissolving congregation.

The assets/funds shall be administered by the Finance Committee. The liquid funds shall be deposited in the Presbytery's investment accounts.

Responsible Committees: Finance Committee and Committee on Ministry.

Per Capita Policy and Administration

Background: *Per Capita is the means by which our denomination funds its "ecclesiastical" expenses. That is, all the expenses required to run the church, but not including "mission" expenditures. The Book of Order (BOO), in the last paragraph of Section G-3.0106, states, "Each council above the session shall prepare a budget for its operating expenses, including administrative personnel, and may fund it with a per capita apportionment among the particular congregations within its bounds. Presbyteries are responsible for raising their own funds and for raising and timely transmission of per capita funds to their respective synods and the General Assembly. Presbyteries may direct per capita apportionments to sessions within their bounds, but in no case shall the authority of the session to direct its benevolences be compromised."*

Policy

Presbytery shall remit ~~75% of the Synod and 50% of the General Assembly per capita goal, OR, the actual amount collected from the churches, whichever is greater,~~ in a timely fashion.

Before the start of the new budget year, the Finance Committee shall communicate the per capita request to each member church. It is suggested that member churches consider paying their full per capita amount.

The Presbytery operating budget will be funded separately from per capita. Each congregation will be asked to make a pledge to the operating budget so that the ecclesiastical work of the connectional church can be accomplished.

The Presbytery shall also have a separate Mission budget that is funded by pledges from congregations for the connectional mission work.

Peace River Presbytery
Beth-El Farm Worker Ministry, Inc.
May 14, 2026

Mission: Beth-El Mission: Feeding the Mind, Spirit, and Body of the farm working community and our neighbors in need through opportunities for hunger relief, education, healthcare, and spiritual growth.

Mission Gratitude: Grace and peace to you. We are grateful for your continued partnership in ministry. At Beth-El Farmworker Ministry, we remain committed to our mission while staying steadfast in addressing the emerging needs and challenges the families we serve face daily. From accompaniment for mothers whose partners have been detained by immigration enforcement, to hosting mission groups who lighten the workload, and growing partnerships that help us solidify our work in changing conditions for farm workers at home and in the fields. We could not do this work without you!

Ministry Update: Beth-El serves families facing food insecurity and economic hardship weekly. Food pantry visits drop when immigration activity rises, as families skip trips to avoid intervention while driving. This may lead to babies and children missing meals. We are currently working with solidarity groups to coordinate home deliveries of groceries. On the other hand, we have seen an increase in visits to our client-choice food market because families can schedule food pickups at different times, allowing them to coordinate food pickups with other errands.

It's Not Too Early for Back-To-School: We strongly encourage church partners interested in collecting backpacks and school supplies for children of immigrant farmworkers to start promoting their collections soon! We saw an increased need last year and used up all our supplies. So, this year we are starting from scratch! See our Wishlist [here](#)!

Nuevo Camino at Beth-El: Our new worshipping community continues to face challenges, including illness, Sunday work schedules, transportation barriers, and immigration concerns. In response, we remain committed to gathering in faith—worshipping, sharing life together, and staying connected even when we cannot meet in person. In this Easter season, we are reminded that God in Christ walks with us always. We continue to nurture community through intergenerational Sunday school, special celebrations, inviting others to worship, and caring for one another through prayer, calls, and visits. We invite your continued prayers and welcome your visit. Please pray especially for Israel, Lizbeth Amanda, and Maria.

Celebrate 50 Years of Ministry: Have your church, small group, family, and friends join in our “50 Acts of Solidarity” campaign — 50 ways to serve, give, or bless farm workers in your own creative way. Whether it's 50 hours of volunteering or donating 50 cans of food, every act of solidarity counts and brings hope to those we serve. Show your impact and inspire others by sharing your story with **#BethEl50** and **#50ActsOfLove**!

SAVE THIS DATE: 50th Special Worship Celebration, **Saturday, October 3rd, 2026**, at 4:00 p.m., Beth-El.

2025 Impact Report: You can explore the full scope of Beth-El's 2025 ministry in our Annual Report, which highlights program impact, financial stewardship, and stories of faithful accompaniment. [View the 2025 Annual Report here](#)

Immediate Needs: *Clothing Items: Long-sleeve UV-protected shirts and cooling bandanas. General Items: Paper products, laundry detergent. Back-to-school supplies.*

Report respectfully submitted by Dr. Teresita Matos-Post, Executive Director, and Rev. Tamara Leonard-Lara, Mission Pastor.

Beth-El Farmworker Ministry, Inc. is a 501(c)(3) nonprofit organization (EIN: 59-3004876)

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