

# 2024 Budget

As proposed to the Diocesan Convention



## IN CHRIST, CALLED TO COLLABORATE

---

238th Annual Convention  
Episcopal Diocese of Massachusetts  
Oct. 27-28, 2023

“Speaking the truth in love, we must grow up in every way into him who is the head, into Christ, from whom the whole body, joined and knit together by every ligament with which it is equipped, as each part is working properly, promotes the body’s growth in building itself up in love.” (Ephesians 4:15-16)





# **2024 BUDGET**

**As approved by the Diocesan Convention  
Oct. 27-28, 2023  
Danvers, Massachusetts**

**The following officers, staff and committee members have assisted the  
Diocesan Council with the preparation of the 2024 budget.**

**Treasurer**

Theodore (Ted) Ts'o

**Budget Committee**

The Rev. Stephen Voysey, Assistant Treasurer and Chair  
Denise Shea, The Rev. Joseph Mumita, Celia Bailey-Ochoa (2023)  
Tom Phillips, Holly Maze Carter, The Rev. Rowan Larson (2024)  
Peter Hughes, The Rev. Lori Mills-Curran, Lynn Smith (2025)

**Mission Initiatives Committee**

David Sullivan, Chair

The Rev. Walter Connelly, Helen Gordon, The Rev. Carol Morehead, The Rev. Derrick Muwina

**Assessment Coordinating Committee**

Connie Melahoures, Chair

Diane Grondin, Rob Kelleher, Ed Rewolinski, Lynn Smith

**Diocesan Staff**

Debra Thomas, Chief Financial Officer

Tom Hamel, Controller

The Rev. Canon Bill Parnell, Canon to the Ordinary

The Rev. Margaret Lias, Administrator for Governance and Grants and

Assistant to the Canon to the Ordinary

Tracy Sukraw, Director of Communications

**Trustees of Donations Staff**

Charles Jordan, Investment Coordinator

## Table of Contents

### Introduction

Letter of Introduction.....	5
Budget Resolution & Canon 10.3.....	6
Our Mission.....	7
Budget Overview.....	9
2024 Proposed Budget Summary Table & Charts.....	14

### Income

The Assessment Formula: Our Common Share.....	16
2024 Assessments by Deanery.....	19
Income from Investments, Endowments & Other Sources.....	23

### Expenses

Guide to Expense Tables and Narratives.....	28
Compensation and Benefits.....	29
Professional Fees and Consultants.....	30
Grants—Mission Initiatives.....	31
Grants—Support for the Wider Church.....	41
Grants—Congregations, Clergy and Special Ministries.....	42
Wider Church Assessments.....	45
Business and Property Maintenance Expenses.....	46
Reserves.....	47
Episcopate and Governance.....	48
Resources for Clergy.....	49
Resources for Congregations.....	50
Appendix A: Summary of Endowment Funds and Investment Accounts.....	51
Appendix B: 2022 Grants.....	64
Appendix C: Diocesan Staff Roster.....	70





## Episcopal Diocese of Massachusetts

138 Tremont Street Boston, Massachusetts 02111 • 617-482-5800 • [www.diomass.org](http://www.diomass.org)

Dear Friends in Christ,

This booklet presents the proposed budget for the Episcopal Diocese of Massachusetts for the calendar year 2024. The goal of the Budget Committee and the Treasurer's Office in preparing this booklet is to provide you with a clear picture of our diocese's financial operations and how we propose to use the resources entrusted to us to further our common mission.

In last year's budget booklet, we changed to a new format which was designed to make it easier to see the "big picture" of our spending priorities. We also started providing a three-year projection of changes in expected income and expenses so that Diocesan Convention and Diocesan Council can better plan our mutual work of ministry. This 2024 budget booklet continues using the new budget format and providing a three-year financial projection, with a lot of work by the Budget Committee and Treasurer's Office to refine them to provide more clarity and transparency, and to improve the model used to make the three-year forecast.

We continue to be blessed by the work of Debra Thomas, our CFO who joined us in September 2022. She has brought many new ideas, and perhaps more importantly, new eyes to see how our budget process works and where it could be improved. Her observations, together with those of the budget process subcommittee, have made it clear that the many rough spots in the budget process have a scope much broader than the work of the Budget Committee.

To that end, this spring the Diocesan Council chartered a new committee, the Budget, Strategy and Governance Committee, chaired by Holly Maze Carter. This committee has representation from past and current members of the Budget Committee, Mission Strategy Committee, Mission Initiatives Committee, Compensation and Benefits Committee and Assessment Coordinating Committee. Its charge is to investigate how we might improve the process of formulating our budget to best support mission strategy. You will be hearing more about the work of the new committee, but we are very grateful for Holly and the members of that committee for continuing the work to make our budget process more responsive to the needs of our diocese and our mission strategy.

As always, many hands have worked to produce the budget that you have in your hands. In particular, in this time of great change, we would like to call out and acknowledge the work of the Standing Committee, the Compensation and Benefits Committee, the Mission Initiatives Committee, the Budget Committee, the Diocesan Council, Bishop Alan Gates, Canon to the Ordinary Bill Parnell, Chief Financial Officer Deb Thomas and Controller Tom Hamel, all of whom have had a hand in the preparation of the 2024 budget.

Faithfully yours,

Theodore Ts'o  
Treasurer

Stephen Voysey  
Assistant Treasurer

## **BUDGET RESOLUTION**

MOVED, that the 238th Annual Convention of the Episcopal Diocese of Massachusetts approve the budget of revenue and expenses for 2024 as summarized on page 14, including the individual parish and mission assessments and approved adjustments for 2024 listed on pages 19-22.

### **Diocese of Massachusetts Canon 10.3: The Diocesan Budget**

*(a) The Treasurer and Diocesan Council, prior to each annual session of the Convention, shall prepare an itemized budget for the income and expenses of the Diocese in the next calendar year. Sources of income include the assessment, endowment and investment income, gifts, grants and undesignated fund balances. All expenses in the budget must be for purposes enumerated in the Diocesan Mission Strategy. Projected expenses may not exceed projected income.*

*(b) The budget shall be presented to Diocesan Council for its approval no later than September prior to the effective year of the proposed budget.*

*(c) The proposed budget shall be printed and sent, not less than four weeks prior to the annual session of Convention, to each member of the clergy, each congregation's treasurer, and to each delegate to the Convention. The Convention, without further reference to committee, shall consider and shall act on the same.*

*(d) Diocesan Council may amend the budget between the sessions of Convention, provided that new expenses conform to the Diocesan Mission Strategy, and that specific sources of income are identified to provide for such expenses.*

## OUR MISSION

*Our renewed mission strategy, adopted in November 2021, is summarized below. Find the full mission strategy document, complete with goals and actions, at [www.diomass.org/mission-strategy](http://www.diomass.org/mission-strategy).*

### **The people we long to be**

In tumultuous times, the center can be hard to find. We continue to be shaken by a global pandemic, a climate emergency and a new reckoning with racial and economic inequalities. These challenges add to the experiences many of us already have of disruption and decline in our church communities. As people of hope, we come together to find a way forward. Renewing our diocesan mission strategy at this crucial moment is one small part of a larger movement of individual Christians and congregations to reclaim our identities and our purpose.

From our own hearts to our shared altars and outward into our diocesan community, we are called to place God's love at the center of our lives. Because Jesus first loves us, we are able to love ourselves, our neighbors and all of creation.

Through this transforming grace, we are becoming the people God created us to be:

### **Disciples of Jesus**

We gather to break bread in Jesus' name, praying to become the Body of Christ in the world. We come together across all ages—children, youth, adults and elders—to teach one another about Jesus' redemptive way. We invite our neighbors to know Jesus, proclaiming the Good News by what we say and how we live.

### **Seekers of justice**

We recognize the dignity and inherent worth of every person, and we work to build communities where all people find fairness, compassion and the freedom to live fully. We persevere in resisting evil, not just our own sins but the deep, structural sins of racism and oppression perpetuated in our name. We turn to the Lord for the grace to create honest dialogue, lasting transformation and true reconciliation.

### **Protectors of creation**

We cherish the wondrous works of God and strive to protect the beauty and integrity of all living beings. We recognize that our greed and thoughtless consumption has placed us at odds with the needs of our created world. We respond to the crisis of our climate, using resources rightly and advocating for the restoration of a healthy planet.

When we follow Jesus intentionally, creating justice in our communities and living wisely on our earth, then we find joy and meaning in our lives. Our churches grow strong, with deep and mutual relationships among our members and our neighbors near and far. Our shared mission comes alive, as a bold witness to God's love for this broken and beautiful world.

## **Our mission**

Our yearnings to be disciples of Jesus, seekers of justice and protectors of creation provide the foundation for us to do our shared work together. We will only reach these goals by becoming more completely the people Jesus calls us to be through the power of the Spirit.

First, last and always, we pray. We ask for God's abiding presence with us and we allow the love of Jesus to transform us. From this place of unconditional grace, mercy and love, we can trust in God's abundance, knowing we will have everything we need. We receive the courage to be agents of reconciliation and justice.

Devotion to the way of love demands vigilance, as the evil powers working to destroy the creatures of God remain unyielding in their attempts to distract us from our relationship to the Almighty. We must address the history and persistent reality of injustice in our church with honesty and humility. We must pray, learn, act and advocate for the world we want to create.

We must be bold. We must be hopeful. We are committed to the tasks being given us by the Spirit. We trust that God is with us in the joys and challenges of this moment. We dedicate ourselves once again as the Body of Christ in this place and time to work for the glorious reign of Jesus.

## **BUDGET OVERVIEW**

### **Introduction**

During late 2022 and 2023, our diocesan Treasurer's Office has continued to implement changes begun during the transition period of the previous two years. In September 2022, after an extensive search process led by Carney Sandoe, we welcomed Debra Thomas as our new chief financial officer. During the past year, under Deb's leadership, we have been able to rely less on the contractors who were so important to the transition and to employ new staff. Tom Hamel continues to serve ably as our controller, a position he has held since 2018. During the past year, Carolina Gomez joined us as an accountant, Matthew Jarrell as director of operations and Amal Armanyous as accounting assistant. Implementation of new communications, finance and development software, a key recommendation from the transition period, is largely completed. Last year, we contracted with a new firm, PKF O'Connor Davies, to conduct our annual audit. This year we contracted with a new managed internet technology provider, Usherwood Office Technology. These efforts undertaken over the past three years have positioned our finance, IT, development and administrative team of staff and contractors to serve our diocese well.

### **Budget, Strategy and Governance Committee**

Over the past year and a half, the Budget Committee of Diocesan Council has studied ways to improve the process by which we create the annual operating budget of our diocese, for approval by Council and Diocesan Convention. To improve the budget process to address the challenges of the next few years, the scope of potential changes goes beyond the Budget Committee, and instead, involves Diocesan Council and other committees of Council. In March 2023, Diocesan Council approved the formation of a Budget, Strategy and Governance Committee and charged it with studying the function and processes of structure, hierarchy and decision-making and proposing recommendations for change for approval by Council.

Budget preparation requires coordination of several committees of Council, including the Mission Strategy Committee, Compensation and Benefits Committee, Mission Initiatives Committee and Assessment Coordinating Committee. A complex and somewhat siloed process has led to communication difficulties, last-minute decisions, inadequate consultation and undue stress on staff and volunteers. Our system dysfunction has created barriers to appropriate fiscal review and analysis that are the foundation of budget formulation and implementation.

Per diocesan Canon 10, the annual operating budget is required to support the diocesan mission strategy. Recent articulations of our mission strategy have tended to be more aspirational, setting out goals and actions as we seek to be, in the words of our current mission strategy, "disciples of Jesus, seekers of justice and protectors of creation." The mission strategy, while focusing on these priorities, does not necessarily mention the ongoing and necessary work of proper governance, administration and operations. Most critically, in a time of limited financial resources, this approach does not give adequate guidance to determine relative priority across aspects of missional opportunities, diocesan staffing, program and operations, and which take precedence from a funding perspective.

Building on our efforts to provide greater clarity, organization and transparency in diocesan finances, further review and analysis of the overall function of diocesan systems and processes related to oversight and decision-making is needed. Diocesan Council has charged the Budget,

Strategy, and Governance Committee with studying ways of improving the budget process to best support mission strategy. Members of the Budget, Strategy and Governance Committee are nominated by the bishops and approved by Council.

## **Reparations Fund**

At the 237th annual Diocesan Convention held in October 2022, our diocese adopted a resolution which calls for the establishment of a Reparations Fund “as a part of our effort to address our legacy of the wealth accumulated through the enslaved labor of Africans and Afro-Caribbeans on our behalf and for our use today... .” Authority for making disbursements from this fund is to be in the hands of a body made up predominantly of people from the communities suffering generations of harm, a body whose composition and guiding principles will be presented by the Racial Justice Commission for approval at this year’s convention.

The resolution calls for an initial pool of resources totaling approximately \$3 million for generating investment income to the fund. The first part of this pool comes from an investment of 15% of Diocesan Council-designated and unrestricted agency funds, which were valued at \$11,896,047 as of June 30, 2023, with this initial investment being set aside no later than Dec. 31, 2023.

The second part of this pool comes from 15% of the draw the diocese receives from the Trustees of Donations on unrestricted trusts held by them on behalf of the diocese, which were \$11,131,960 as of June 30, 2023, beginning in 2024 and until the body of the Reparations Fund exceeds a value of \$11.1 million. Until the corpus of the Reparations Fund exceeds \$11.1 million, this portion of the draw from unrestricted trusts will be directed to the Reparations Fund in 2024 and in subsequent years. Fifteen percent of the draw from these resources applied to the Reparations Fund in 2024 is projected to be \$68,000.

The resolution calls as well for other resources to be applied to the Reparations Fund to help attain the goal of \$11.1 million. The resolution urges the bishop diocesan to commit annually the draw from 15% of the unrestricted bishop-directed funds, which were \$7,877,588 as of June 30, 2023, as the third part of the initial pool for this new diocesan Reparations Fund. The amount allocated to the Reparations Fund from unrestricted bishop’s directed funds in 2024 is projected to be \$24,000, with an additional \$24,000 used to fund the work of the Racial Justice Commission (in addition to the \$50,000 allocated in the 2024 budget, drawn from the John B. Coburn Endowment Fund [D7002C]), as well as the diversity, equity and inclusion work being undertaken with diocesan staff. In recent years, the bishop diocesan has committed approximately 85% of the draw from BDFs to the annual budget, reserving the balance to support initiatives identified by the bishop diocesan during the year. In 2024, the total amount of the draw from BDFs applied to the annual budget is \$606,442.

The resolution adopted last year also calls for 3% of assessment income to be allocated to the Reparations Fund, beginning in 2025, until the \$11.1 million goal is reached. While this will not apply to assessment income in the 2024 budget, it will be a part of annual budgets beginning in 2025 and continuing until the goal of the Reparations Fund is reached. (See the three-year budget forecast on page 13.) The resolution also urges individual Episcopalians and others to prayerfully consider what commitment they might feel called to make from their own financial resources to this fund. The establishment of the Reparations Fund is a reflection of the commitment of our diocese, our governing bodies and our leadership to continue fostering opportuni-

ties to engage in truth telling and repair, in hopes of racial reconciliation in the context of the diocese and its communities. Our congregations and affiliated organizations are urged to do likewise.

## **Life Together**

The landscape for young adult service programs has changed dramatically in recent years. Even large and well-established opportunities such as Americorps and Jesuit Volunteer Corps are struggling to recruit volunteers. A program model evaluation in 2022 with outside consultants also highlighted the ways that Life Together needs to be reimaged to meet the needs of a new generation of young adults.

In light of all this, we have prayerfully decided to place Life Together on sabbath during the 2024-2025 program year to better discern our response to a changing context. These plans will not directly impact the 2023-2024 program year, for which our diocese will welcome young adult fellows from across the country to live and serve among us. However, we will not host fellows in the following program year, as we discern faithful next steps for a ministry that has formed more than 200 young adults in the past 24 years.

Plans for the sabbath include the formation of a Discernment Team to explore sustainable ways forward for our diocesan commitment to young adults. This team will include alumni and supporters of Life Together, as well as other diocesan leaders who care deeply about young adults. Just as a season of discernment for The Micah Project in 2007-2009 led to the emergence of Life Together, we take this step trusting that the discernment of 2023-2025 will give rise to the next iteration of young adult fellowships in the Diocese of Massachusetts. Entrepreneurial reinvention has been part of this work since the beginning, and we trust that the Holy Spirit is already swirling creatively in our midst to bring a new thing to life.

## **Higher Education Chaplaincies**

A key part of our diocesan ministry among young adults is our presence at institutions of higher education. The models for university and college chaplaincies have changed substantially from the days of individual denominational groups with offices on campus. Many chaplaincies are now ecumenical collaborations or multifaith efforts, sometimes as part of the staff of the institution of higher learning.

The Rev. Thea Keith-Lucas, who for many years served as the Episcopal chaplain for the Lutheran-Episcopal Ministry at the Massachusetts Institute of Technology, was named Chaplain to the Institute at the beginning of 2022 after serving for a year and a half in an interim capacity. During the past academic year, the Lutheran chaplain took on greater responsibilities, with a portion of their compensation funded by our diocese. As we move into a new academic year, an Episcopal chaplain will serve half-time alongside the Lutheran chaplain, who will return to half-time status.

Similarly, the Episcopal chaplaincies at Northeastern University and Boston College have been under review. The chaplaincies, which for many years have constituted one full-time position, are now divided into two half-time positions.

A more recent initiative has been the development of a campus chaplaincy at the University of Massachusetts–Dartmouth. Led by the Rev. Scott Ciosek, the rector of St. Peter’s Church,

Dartmouth, this new ministry has taken root in promising ways. Initial funding has been provided through a combination of a restricted gift from a generous donor, diocesan grants and other support.

In addition to these chaplaincies, our diocese partners with Boston University to provide a grant to the university for a full-time Episcopal chaplain, who serves as part of the chaplaincy team at Marsh Chapel, and with Tufts University to provide a grant for one half of the compensation package for the half-time Protestant chaplain.

### **Funding from Reserve Accounts**

After the last episcopal election in our diocese, Diocesan Council voted to set aside funds in each annual budget to prepare for future episcopal elections. While the election of our next bishop diocesan in 2024 is not reflected in the annual budget, funds have been set aside over the past decade to cover the costs of the coming episcopal election and transition. The balance of funds reserved for episcopal elections, as of June 30, 2023, is approximately \$495,000.

Since 1989, after the previous diocesan headquarters at 1 Joy Street on Beacon Hill were sold, our offices have been located at the Cathedral Church of St. Paul, 138 Tremont Street, Boston. A newly installed HVAC system at the cathedral will enable comfortable use of portions of the buildings that, until now, did not receive adequate cooling in summer or heating in the winter. This will enable the diocesan staff to move out of second floor office space and consolidate our offices to the fourth and fifth floors. While the necessary improvements will be drawn from capital reserves, substantial annual savings in our space use agreement with the cathedral will be reflected beginning with the annual budget in 2024.

Similarly, we are seeking new space out of central Boston for the diocesan archives. This will further reduce our footprint at 138 Tremont Street. Here too we anticipate that the relocation will be funded from capital reserves and that this will result in substantial annual budget savings in the coming years.

### **Budget Forecast and the Challenges Ahead**

In the 2023 budget book for the 2022 annual Diocesan Convention, a three-year projection (2024-2026) of diocesan income was presented. As is the case with any outlook, changed circumstances, unforeseen challenges and pleasant surprises alter the outcome of our educated guesses. Many convention delegates will recall that we projected a shortfall going into the 2024 diocesan budget of between \$850,000 and \$943,000. Canon 10 requires that projected expenses not exceed projected income, yet the overall budget for 2024 has decreased by approximately \$420,000. Several factors have made the 2024 outlook less drastic than originally anticipated.

Whereas the forecast presented last year anticipated a decline in assessment income of \$94,000, the assessment income anticipated in 2024 is increased by approximately \$283,000. This is due in part to an increase in calculated assessments (increased by \$143,000), reflecting an overall increase in normal operating income among our congregations, as well as a significantly lower estimate for restated 2022 Parochial Reports (down by \$140,000).

Additionally, the forecast presented last year anticipated a minimal increase in the draw on diocesan endowments, due to the downturn in the stock market at the time. The draw on endow-

ments is based on a 12-quarter rolling average to protect us from wild swings in market value. Whereas we projected a modest increase in endowment and investment income of \$57,000, the actual draw for the coming year anticipates an increase of \$157,000, thanks in part to better-than-expected market performance and to an increased draw on unexpended available funds from a small number of restricted endowments.

In spite of these encouraging line items, the loss of pandemic relief included in 2021-2023 poses a reduction in income of \$241,000 in 2024.

Undeterred by changing and unforeseen circumstances, we yet again provide our best estimates for a three-year projection of diocesan income and expenses in the table below, showing projected year-over-year changes that we anticipate for 2025-2027.

These projections assume a flat stock market and 3% annual increases in compensation and other expenses.

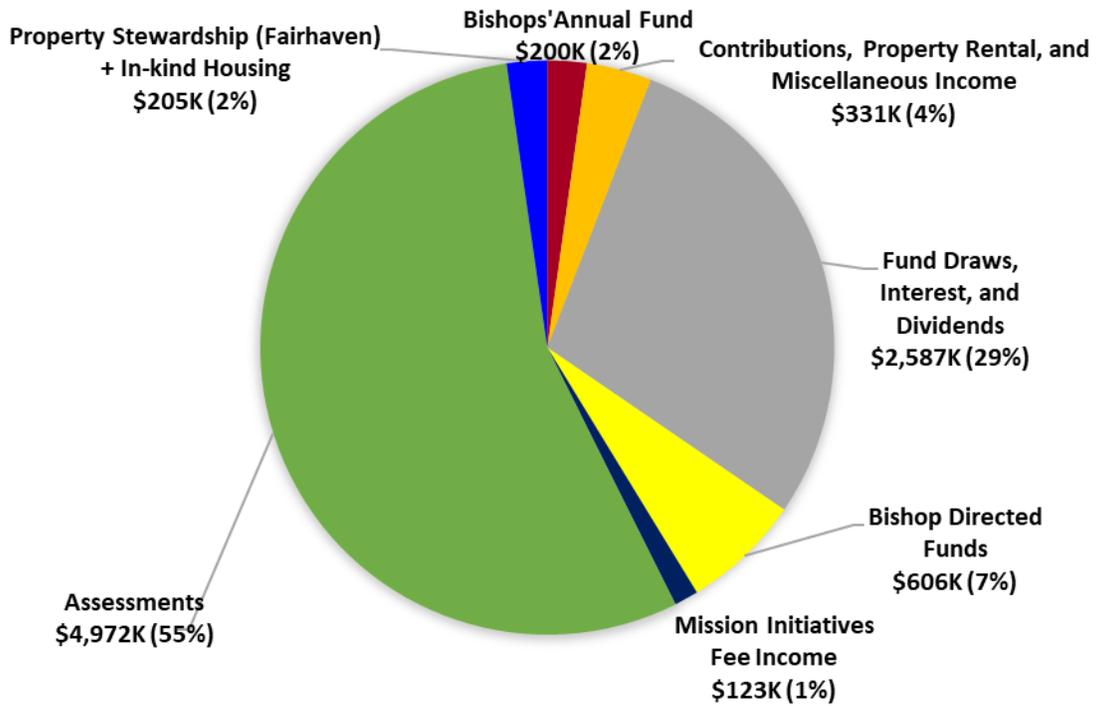
Numbers in parentheses indicate projected loss of income or projected increase in expenses. Numbers without parentheses indicate projected increase in income.

<b>Source</b>	<b>2024 to 2025</b>	<b>2025 to 2026</b>	<b>2026 to 2027</b>
<b>Income</b>			
Assessments	(25,000)	(26,000)	(27,000)
Investment/Endowment Income	(55,000)	(85,000)	(95,000)
Income from Fairhaven Sale	(150,000)		
Bishops' Annual Appeal	100,000	100,000	100,000
<b>Total Income</b>	<b>(130,000)</b>	<b>(11,000)</b>	<b>(23,000)</b>
<b>Expense</b>			
Compensation	(115,000)	(118,000)	(122,000)
Other Expenses	(78,000)	(78,000)	(78,000)
<b>Subtotal from Income/Expense</b>	<b>(193,000)</b>	<b>(196,000)</b>	<b>(200,000)</b>
<b>Reparations Fund</b>			
15% of Unrestricted Draw	(3,000)	(7,000)	(15,000)
3% of Assessment Revenue effective 2025	(149,000)	(1,000)	(1,000)
<b>Subtotal Reparations Fund</b>	<b>(152,000)</b>	<b>(8,000)</b>	<b>(16,000)</b>
<b>Total (annual)</b>	<b>(475,000)</b>	<b>(215,000)</b>	<b>(239,000)</b>
<b>Total (cumulative)</b>	<b>(475,000)</b>	<b>(690,000)</b>	<b>(929,000)</b>

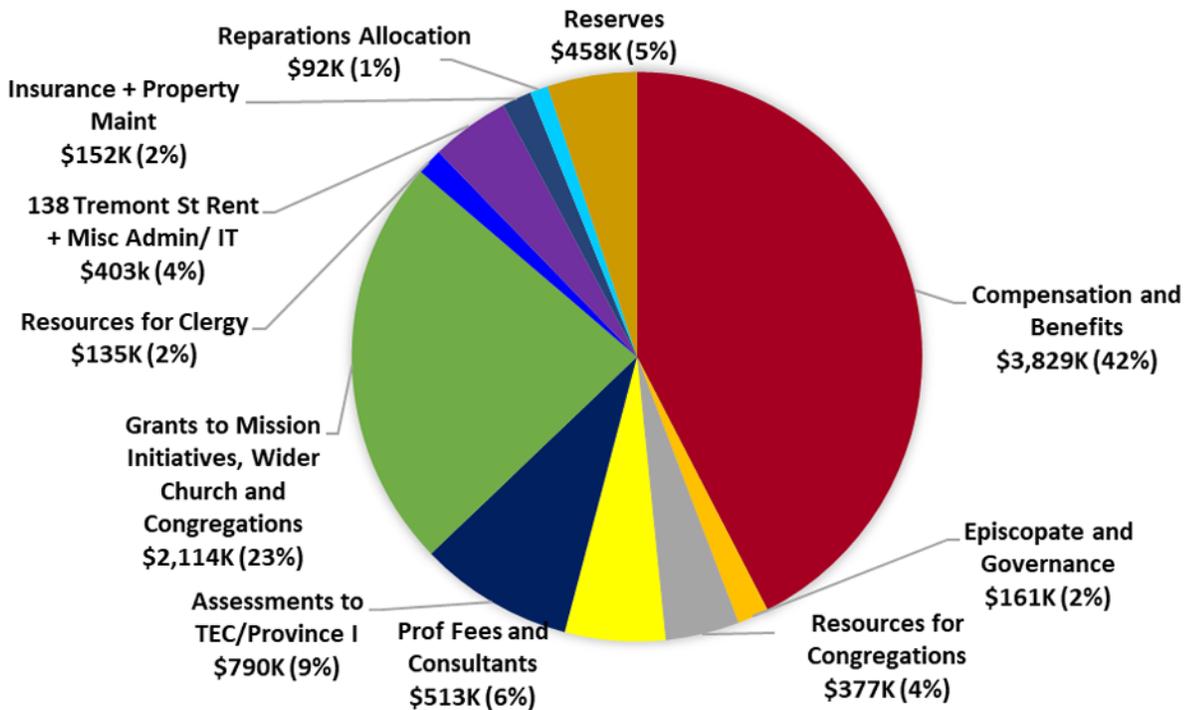
## BUDGET SUMMARY

	Subtotals	<b>2023 Budget</b>	<b>%</b>	Subtotals	<b>2024 Budget</b>	<b>%</b>
<b>INCOME</b>						
Assessments (net)		<b>4,693,968</b>	<b>50%</b>		<b>4,972,360</b>	<b>55%</b>
<b>Investments and Endowments</b>						
Restricted	1,752,330			1,883,930		
Unrestricted	1,283,986			1,309,299		
<b>Total</b>		<b>3,036,316</b>	<b>32%</b>		<b>3,193,229</b>	<b>35%</b>
<b>Other Income</b>						
Restricted	737,650			247,158		
Unrestricted	978,700			611,370		
<b>Total</b>		<b>1,716,350</b>	<b>18%</b>		<b>858,528</b>	<b>10%</b>
<b>TOTAL INCOME</b>		<b>9,446,634</b>			<b>9,024,117</b>	
<b>EXPENSES</b>						
<b>Compensation and Benefits</b>						
Bishops and Diocesan Staff	3,367,951			3,509,627		
Mission Initiatives Employees	568,922			319,445		
<b>Total</b>		<b>3,936,873</b>	<b>42%</b>		<b>3,829,072</b>	<b>42%</b>
<b>Professional Fees and Consultants</b>		<b>571,000</b>	<b>6%</b>		<b>513,200</b>	<b>6%</b>
<b>Grants</b>						
Mission Initiatives (excluding compensation)	1,198,412		13%	1,114,519		12%
Wider Church	136,629		1%	135,018		1%
Congregations, Clergy, Special Ministries	830,996		9%	864,573		10%
<b>Total</b>		<b>2,186,037</b>	<b>23%</b>		<b>2,114,110</b>	<b>23%</b>
<b>Assessments to TEC/Province I</b>		<b>819,169</b>	<b>9%</b>		<b>790,329</b>	<b>9%</b>
<b>Operational Expenses</b>		<b>657,335</b>	<b>7%</b>		<b>554,400</b>	<b>6%</b>
<b>Reserves</b>		<b>383,000</b>	<b>4%</b>		<b>458,015</b>	<b>5%</b>
<b>Episcopate and Governance</b>		<b>190,091</b>	<b>2%</b>		<b>161,091</b>	<b>2%</b>
<b>Resources for Clergy</b>		<b>132,600</b>	<b>1%</b>		<b>134,600</b>	<b>1%</b>
<b>Resources for Congregations</b>		<b>570,529</b>	<b>6%</b>		<b>377,300</b>	<b>4%</b>
<b>Reparations Fund Allocation</b>		N/A			<b>92,000</b>	<b>2%</b>
<b>TOTAL EXPENSES</b>		<b>9,446,634</b>			<b>9,024,117</b>	
<b>Net surplus / (deficit)</b>		<b>\$0</b>			<b>\$0</b>	

### INCOME



### EXPENSE



## **THE ASSESSMENT FORMULA: OUR COMMON SHARE**

The current assessment formula was adopted at Diocesan Convention in November 2021, and has been applied to assessment calculations in the 2022-2024 diocesan budgets. The objectives of the formula were to lighten the load on congregations with few financial assets and make a more gradual slope of percentages as assets increase. Unlike the expense-based assessment formula used for many years in our diocese, the current formula is based on income. The calculation is based on Line A (“Normal Operating Income”) of the Parochial Report, less Line 13 (“Outreach from Operating Budget”).

For many years, congregational assessments were based on data from the Parochial Report filed for the third year prior to the diocesan budget year. For example, in the 2023 diocesan budget, assessments were calculated using data from the 2020 Parochial Report filed by each congregation. This year, for the first time, assessment calculations are based on data from two years prior, i.e., 2024 assessments are based on 2022 Parochial Report data.

The deadline for filing 2022 Parochial Reports with the General Convention Office of The Episcopal Church was March 1, 2023. Diocesan Canon 9.2(d) requires that congregations be notified of their assessment for the forthcoming year not later than May 1. At its Jan. 21, 2023, meeting, Diocesan Council adopted the assessment formula, approved calculating it with the information from 2022 Parochial Reports and asked that congregations be reminded to file their reports in a timely manner. Congregations were sent a reminder on Feb. 27, noting that, unless a congregation’s 2022 Parochial Report was filed by April 15, 2023, the congregation’s 2024 assessment would be calculated at 20% higher than the data from their most recent prior-year Parochial Report, given the notification requirement of Canon 9.2(d). Congregations were also notified that they could request an extension beyond the April 15 deadline by notifying the Treasurer’s Office. The diocesan treasurer and chief financial officer were authorized to waive the 20% late filing surcharge for important and compelling reasons. One parish missed the April 15 deadline, filing in July, and its assessment has been calculated according to the assessment formula using its 2022 Parochial Report data. Eight congregations, however, have yet to file their 2022 Parochial Report, and their 2024 assessments have been calculated using their most recently filed Parochial Report (2021), plus 20%. These congregations may file a request with the Assessment Coordinating Committee for an adjustment, which must be approved by Diocesan Council.

When the new assessment formula was instituted, we discovered that many congregations had reported incorrect data in their Parochial Reports. (For example, some incorrectly included in Line A donations for capital expenditures, bequests or investment returns not used for the operating budget.) As local treasurers and finance committees have examined their reported income figures more closely, Parochial Report restatements have declined dramatically.

## Assessment Formula

Where BASE for 2024 is equal to Line A (“Normal Operating Income”) from the 2022 Parochial Report, less Line 13 (“Outreach from Operating Budget”), the following rates shall be applied:

BASE between 0 and \$49,999.99	0.50% of BASE
BASE between \$50,000 and \$99,999.99	\$250 plus 7% of BASE-\$50,000
BASE between \$100,000 and \$249,999.99	\$3,750 plus 12.70% of BASE-\$100,000
BASE between \$250,000 and \$499,999.99	\$3,750 plus 13.10% of BASE-\$100,000
BASE between \$500,000 and \$999,999.99	\$3,750 plus 13.25% of BASE-\$100,000
BASE between \$1,000,000 and \$1,999,999.99	\$3,750 plus 13.50% of BASE-\$100,000
BASE of \$2,000,000	\$3,750 plus 14.50% of BASE-\$100,000

For a mission, the 2024 assessment is two-thirds the parish amount.

This assessment formula generates a gross assessment for 2024 of \$5,057,551, before adjustments. In addition, there are contributions in lieu of assessment from the Cathedral Church of St. Paul of \$30,000, and from Christ Church (Old North) at \$15,000. The 2024 budget reserves \$110,191 for assessment adjustments based on need. To date, there have been six applications for need-based adjustment. These are still pending a recommendation from the Assessment Coordinating Committee and will need approval by Diocesan Council during the budget year. A total of \$20,000 is reserved for churches that restated their 2022 Parochial Reports (of which \$12,147 has been included in the assessment charts). The net budgeted income from assessments and payments in lieu of assessments is \$4,972,360, or 55% of the total budget.

### Assessment Relief to Congregations

The Assessment Coordinating Committee is a committee of Diocesan Council whose charge is working with congregations to determine equitable assessments relative to each congregation’s particular circumstances. A congregation wishing to apply for an assessment adjustment is encouraged to contact the Assessment Coordinating Committee as soon as it identifies the challenging situation affecting the ability to meet the annual assessment. Each spring, the committee receives applications for adjustments and makes recommendations to the Diocesan Convention. The usual criteria used by the committee and its recommendations for assessment adjustments are noted below. Adjustments granted to date are reported in this section and on the assessment charts by deanery which follow. Additional adjustments may be granted, with the approval of Diocesan Council, during the year.

### Criteria for Adjustment

Congregations may submit applications for adjustments to their assessments in one of two ways. Recommendations for adjustments are made to Diocesan Council on one or more of the following conditions:

- Each year, a change in circumstance of a congregation can create significant opportunities or undue hardships. In either case, the financial stresses resulting from changes in circum-

stances motivate congregations to seek adjustments to their annual assessments. Congregations that realize a change in circumstances that will result in the inability to meet their annual assessment are invited to apply to the Assessment Coordinating Committee for a need-based adjustment.

- On occasion, a congregation determines that it has made an error or oversight in completing its Parochial Report. Errors may result in incorrect congregational assessment. Congregations are invited to discuss Parochial Report recalculations with the diocesan Treasurer’s Office as soon as possible after their originally reported information was used to compute their assessment.

**Adjustment Recommendations**

**Adjustments based on changed circumstances**

*No need-based assessment adjustments have been recommended by the Assessment Coordinating Committee at this time. Six applications are pending a recommendation and will need approval by Diocesan Council during the budget year.*

**Adjustments based on corrected Parochial Reports**

<b>City/Town</b>	<b>Congregation</b>	<b>2024 Formula Assessment</b>	<b>Adjustment</b>	<b>2024 Assessment (for vote)</b>
Watertown	Church of the Good Shepherd	\$28,926	\$12,147	\$16,779

## 2024 Assessment By Deanery

Code = Diocesan Church Code

\*\*\* Mission (2/3 calculated assessment)

Code	Church	Location	Base	Formula Assessment	Adjustments	2024 Assessment (for Vote)	Prior Year Assessment
<b>ALEWIFE DEANERY</b>							
2010	Church of Our Saviour	Arlington	188,042	14,931	0	14,931	11,731
2015	St. John's Church	Arlington	179,097	13,795	0	13,795	11,411
2025	St. Paul's Church	Bedford	296,301	29,465	0	29,465	30,159
2030	All Saints' Church	Belmont	317,058	32,185	0	32,185	28,014
2045	St. Mark's Church	Burlington	126,605	7,129	0	7,129	4,130
2050	Christ Church	Cambridge	1,013,041	127,011	0	127,011	161,589
2055	St. Bartholomew's Church	Cambridge	117,543	5,978	0	5,978	11,891
2060	St. James's Church	Cambridge	338,866	35,041	0	35,041	44,048
2065	St. Peter's Church	Cambridge	346,120	35,992	0	35,992	35,386
2085	Church of Our Redeemer	Lexington	488,638	54,662	0	54,662	45,767
2135	St. James's Church	Somerville	68,550	1,549	0	1,549	393
2145	Christ Church	Waltham	209,151	17,612	0	17,612	14,016
2155	<i>St Peters Congregation***</i>	<i>Waltham</i>	-	711	0	711	592
2150	Church of the Good Shepherd	Watertown	292,182	28,926	12,147	16,779	12,562
				<b>404,987</b>	<b>12,147</b>	<b>392,840</b>	<b>411,689</b>
<b>BOSTON HARBOR DEANERY</b>							
4010	Church of the Advent	Boston	1,155,935	146,301	0	146,301	142,078
4025	Emmanuel Church	Boston	480,642	53,614	0	53,614	43,409
4035	St. Augustine's & St. Martin's Ch.	Boston	127,209	7,206	0	7,206	9,232
4070	<i>St. Stephen's Church***</i>	<i>Boston</i>	120,904	4,270	0	4,270	3,151
4075	Trinity Church	Boston	3,082,177	436,166	0	436,166	390,493
1030	St. John's Church	Boston (Charlestown)	228,985	20,131	0	20,131	19,122
4055	St. Mark's Church	Boston (Dorchester)	98,661	3,656	0	3,656	1,188
4060	St. Mary's Church	Boston (Dorchester)	217,104	18,622	0	18,622	11,218
3020	St. John's Church	Boston (Jamaica Plain)	235,540	20,964	0	20,964	21,656
4040	St. Cyprian's Church	Boston (Roxbury)	-	13,326	0	13,326	11,105
4050	<i>St. John St. James Church***</i>	<i>Boston (Roxbury)</i>	65,000	867	0	867	396
				<b>725,123</b>	<b>0</b>	<b>725,123</b>	<b>653,048</b>
<b>CAPE AND ISLANDS DEANERY</b>							
6005	St. Mary's Church	Barnstable	695,391	82,639	0	82,639	78,941
6010	St. Peter's Church	Buzzards Bay	126,160	7,072	0	7,072	6,738
6015	St. Christopher's Church	Chatham	687,126	81,544	0	81,544	82,787
6020	St. Andrew's Church	Edgartown	463,416	51,357	0	51,357	53,816
6030	St. Barnabas's Church	Falmouth	720,626	85,983	0	85,983	70,712
6040	Christ Church	Harwich Port	259,486	24,643	0	24,643	17,695
6045	St. Paul's Church	Nantucket	650,801	76,731	0	76,731	68,123
6050	Trinity Church	Oak Bluffs	31,754	159	0	159	127
6055	Church of the Holy Spirit	Orleans	597,623	69,685	0	69,685	59,968
6060	St. Peter's Church	Osterville	346,280	36,013	0	36,013	30,245
6065	Christ Church	Plymouth	363,231	38,233	0	38,233	39,414
6070	St. Mary's Church	Provincetown	219,378	18,911	0	18,911	14,696
6075	St. John's Church	Sandwich	221,124	19,133	0	19,133	25,915
6095	St. David's Church	South Yarmouth	334,466	34,465	0	34,465	32,135
6080	Grace Church	Vineyard Haven	279,309	27,239	0	27,239	34,806
6085	Church of the Good Shepherd	Wareham	223,704	19,460	0	19,460	13,960
6090	Chapel of St. James the Fisherman	Wellfleet	-	119	0	119	99
6025	Church of the Messiah	Falmouth (Woods Hole)	305,066	30,614	0	30,614	27,772
				<b>704,000</b>	<b>0</b>	<b>704,000</b>	<b>657,949</b>

## 2024 Assessment By Deanery

Code = Diocesan Church Code

\*\*\* Mission (2/3 calculated assessment)

Code	Church	Location	Base	Formula Assessment	Adjustments	2024 Assessment (for Vote)	Prior Year Assessment
<b>CHARLES RIVER DEANERY</b>							
3030	All Saints Parish	Brookline	580,469	67,412	0	67,412	75,952
3035	Church of Our Saviour	Brookline	426,745	46,554	0	46,554	27,857
3045	St. Paul's Church	Brookline	591,743	68,906	0	68,906	61,224
3125	Church of the Redeemer	Newton (Chestnut Hill)	996,535	122,541	0	122,541	126,012
3060	St. Dunstan's Church	Dover	295,906	29,414	0	29,414	29,734
3105	Christ Church	Needham	506,512	57,613	0	57,613	61,785
3110	Grace Church	Newton	493,776	55,335	0	55,335	45,974
3145	Trinity Church	Newton Centre	407,919	44,087	0	44,087	41,166
3135	St. Paul's Church	Newton Highlands	170,242	12,671	0	12,671	10,509
3140	St. Mary's Church	Newton Lower Falls	467,488	51,891	0	51,891	54,620
3130	St. John's Church	Newton (Newtonville)	165,628	12,085	0	12,085	11,460
3115	Church of the Good Shepherd	Newton (Waban)	456,034	50,390	0	50,390	38,267
3165	St. Andrew's Church	Wellesley	1,503,440	193,214	0	193,214	176,706
				<b>812,113</b>	<b>0</b>	<b>812,113</b>	761,267
<b>CONCORD RIVER DEANERY</b>							
2005	Church of the Good Shepherd	Acton	359,213	37,707	0	37,707	40,639
2020	St. Andrew's Church	Ayer	214,118	18,243	0	18,243	16,499
2075	Trinity Church	Concord	929,073	113,602	0	113,602	99,040
3065	St. Andrew's Church	Framingham	300,492	30,014	0	30,014	35,393
3075	St. Michael's Church	Holliston	193,820	15,665	0	15,665	16,426
3080	St. Paul's Church	Hopkinton	118,413	6,088	0	6,088	683
2080	St. Luke's Church	Hudson	58,590	851	0	851	1,896
2090	St. Anne's-in-the-Fields Church	Lincoln	621,403	72,836	0	72,836	67,682
3100	St. Paul's Church	Natick	387,015	41,349	0	41,349	53,249
2125	Trinity Chapel	Shirley	78,207	2,224	0	2,224	1,810
3155	St. Mark's Church	Southborough	298,312	29,729	0	29,729	33,723
2140	St. Elizabeth's Church	Sudbury	-	60,289	0	60,289	50,241
2165	St. Peter's Church	Weston	517,108	59,017	0	59,017	51,204
				<b>487,614</b>	<b>0</b>	<b>487,614</b>	468,485
<b>MERRIMACK VALLEY DEANERY</b>							
1005	St. James's Church	Amesbury	219,145	18,881	0	18,881	14,324
1010	Christ Church	Andover	521,148	59,552	0	59,552	72,210
2070	All Saints' Church	Chelmsford	376,524	39,975	0	39,975	34,725
1055	St. James's Church	Groveland	113,399	5,452	0	5,452	8,331
1065	Trinity Church	Haverhill	203,221	16,859	0	16,859	19,637
1075	Grace Church	Lawrence	219,928	18,981	0	18,981	17,271
2095	St. Anne's Church	Lowell	246,267	22,326	0	22,326	24,858
2100	St. John's Church	Lowell	55,872	661	0	661	245
1125	St. Andrew's Church	Methuen	132,471	7,874	0	7,874	3,673
1130	St. Paul's Church	Newburyport	-	37,265	0	37,265	31,055
1135	St. Paul's Church	North Andover	205,733	17,178	0	17,178	18,858
2040	St. Anne's Church	North Billerica	181,966	14,160	0	14,160	7,158
1195	All Saints' Church***	West Newbury	-	2,762	0	2,762	2,302
2160	St. Mark's Church	Westford	168,535	12,454	0	12,454	9,709
				<b>274,381</b>	<b>0</b>	<b>274,381</b>	264,356

## 2024 Assessment By Deanery

Code = Diocesan Church Code  
 \*\*\* Mission (2/3 calculated assessment)

Code	Church	Location	Base	Formula Assessment	Adjustments	2024 Assessment (for Vote)	Prior Year Assessment
<b>MOUNT HOPE - BUZZARDS BAY DEANERY</b>							
5020	St. Peter's Church	Dartmouth	87,429	2,870	0	2,870	2,744
5035	Church of the Holy Spirit	Fall River	295,767	29,395	0	29,395	27,071
5045	St. Luke's Church	Fall River	44,716	224	0	224	196
5070	St. Gabriel's Church	Marion	475,142	52,894	0	52,894	55,231
5080	Grace Church	New Bedford	557,727	64,399	0	64,399	55,492
5085	St. Andrew's Church	New Bedford	85,946	2,766	0	2,766	1,602
5090	St. Martin's Church	New Bedford	100,430	3,805	0	3,805	3,715
5110	Church of Our Saviour	Somerset	165,169	12,026	0	12,026	8,123
5115	Christ Church	Swansea	261,378	24,891	0	24,891	3,271
				<b>193,270</b>	<b>0</b>	<b>193,270</b>	157,445
<b>MYSTIC VALLEY DEANERY</b>							
1035	<i>St. Luke's/San Lucas Church***</i>	<i>Chelsea</i>	144,705	6,285	0	6,285	8,724
1025	<i>Grace Church Federated***</i>	<i>Boston (East)</i>	12,000	40	0	40	68
1045	Grace Church	Everett	-	251	0	251	209
1095	St. Paul's Church	Lynnfield	368,086	38,869	0	38,869	31,876
1105	St. Paul's Church	Malden	82,348	2,514	0	2,514	2,068
2115	Grace Church	Medford	340,782	35,292	0	35,292	44,437
1120	Trinity Church	Melrose	244,753	22,134	0	22,134	15,576
1145	Church of the Good Shepherd	Reading	248,861	22,655	0	22,655	18,685
1170	St. John's Church	Saugus	153,742	10,575	0	10,575	11,774
1190	Emmanuel Church	Wakefield	238,195	21,301	0	21,301	17,233
2170	St. Elizabeth's Church	Wilmington	38,893	194	0	194	196
2175	Parish of the Epiphany	Winchester	1,135,005	143,476	0	143,476	104,909
1200	St. John's Church	Winthrop	177,251	13,561	0	13,561	8,384
2180	Trinity Parish	Woburn	93,295	3,281	0	3,281	2,275
				<b>320,428</b>	<b>0</b>	<b>320,428</b>	266,413
<b>NEPONSET RIVER DEANERY</b>							
4085	Trinity Church	Canton	179,350	13,827	0	13,827	3,571
3050	Church of the Good Shepherd	Dedham	141,515	9,022	0	9,022	9,828
3055	St. Paul's Church	Dedham	313,736	31,749	0	31,749	48,374
4015	All Saints' Church	Boston (Dorchester)	509,444	58,001	0	58,001	51,270
3005	Christ Church	Boston (Hyde Park)	16,468	82	0	82	6,408
3015	<i>Iglesia de San Juan***</i>	<i>Boston (Hyde Park)</i>	-	-	0	0	10
4030	Church of the Holy Spirit	Boston (Mattapan)	-	36,444	0	36,444	30,370
3085	Church of the Advent	Medfield	207,267	17,373	0	17,373	6,928
3090	Christ Church	Medway	45,572	228	0	228	1,043
4130	St. Michael's Church	Milton	641,028	75,436	0	75,436	61,341
3150	Grace Church	Norwood	144,797	9,439	0	9,439	8,896
5105	St. John's Church	Sharon	65,722	1,351	0	1,351	172
4160	Trinity Church	Stoughton	102,399	4,055	0	4,055	6,428
3160	Epiphany Church	Walpole	183,830	14,396	0	14,396	11,677
3010	Emmanuel Church	Boston (West Roxbury)	43,997	220	0	220	178
3170	St. John's Church	Westwood	230,848	20,368	0	20,368	16,273
				<b>291,991</b>	<b>0</b>	<b>291,991</b>	262,765

## 2024 Assessment By Deanery

Code = Diocesan Church Code

\*\*\* Mission (2/3 calculated assessment)

Code	Church	Location	Base	Formula Assessment	Adjustments	2024 Assessment (for Vote)	Prior Year Assessment
<b>NORTH SHORE DEANERY</b>							
1021	St. Peter's Church	Beverly	313,501	31,719	0	31,719	34,062
1015	St. John's Church	Beverly Farms	739,325	88,461	0	88,461	89,391
1143	All Saints Episc. Church of N. S.	Danvers	237,782	21,248	0	21,248	19,651
1050	St. John's Church	Gloucester	278,637	27,151	0	27,151	24,989
1070	Ascension Memorial Church	Ipswich	313,796	31,757	0	31,757	28,943
1090	St. Stephen's Church	Lynn	407,337	44,011	0	44,011	35,472
1110	St. Andrew's Church	Marblehead	452,533	49,932	0	49,932	43,492
1116	St. Michael's Church	Marblehead	323,369	33,011	0	33,011	27,544
1155	St. Mary's Church	Rockport	164,255	11,910	0	11,910	9,746
1160	Grace Church	Salem	172,479	12,955	0	12,955	11,586
1165	St. Peter's Church	Salem	171,826	12,872	0	12,872	8,080
1060	Christ Church	South Hamilton & Wenham	569,135	65,910	0	65,910	69,416
1180	Church of the Holy Name	Swampscott	-	10,890	0	10,890	9,075
1185	Trinity Church	Topsfield	-	23,026	0	23,026	19,188
				<b>464,853</b>	<b>0</b>	<b>464,853</b>	430,635
<b>SOUTH SHORE DEANERY</b>							
4080	Emmanuel Church	Braintree	118,411	6,088	0	6,088	3,342
4170	<i>Grace Chapel***</i>	<i>Brockton</i>	35,101	117	0	117	451
4090	St. Stephen's Church	Cohasset	419,681	45,628	0	45,628	41,115
4095	Church of St. John the Evangelist	Duxbury	510,395	58,127	0	58,127	40,658
4100	St. Andrew's Church	Hanover	157,227	11,018	0	11,018	8,715
4105	St. John's Church	Hingham	754,441	90,463	0	90,463	94,438
4110	St. John's Church	Holbrook	101,143	3,895	0	3,895	3,280
4120	Trinity Church	Marshfield Hills	128,867	7,416	0	7,416	11,668
4125	Church of Our Saviour	Milton	197,733	16,162	0	16,162	19,749
4135	Christ Church	Quincy	103,678	4,217	0	4,217	7,680
4140	Parish of St. Chrysostom	Quincy (Wollaston)	195,495	15,878	0	15,878	9,194
4145	Trinity Church	Randolph	100,751	3,845	0	3,845	1,177
4150	Trinity Church	Rockland	85,211	2,715	0	2,715	2,452
4155	St. Luke's Church	Scituate	237,896	21,263	0	21,263	20,067
4165	Church of the Holy Nativity	South Weymouth	163,394	11,801	0	11,801	9,242
5130	All Saints' Church	Whitman	79,822	2,338	0	2,338	2,862
				<b>300,971</b>	<b>0</b>	<b>300,971</b>	276,090
<b>TAUNTON RIVER DEANERY</b>							
5005	All Saints' Church	Attleboro	100,740	3,844	0	3,844	3,050
5010	Trinity Church	Bridgewater	126,825	7,157	0	7,157	5,373
5060	St. Mark's Church	Foxboro	212,398	18,025	0	18,025	17,784
3070	St. John's Church	Franklin	149,163	9,994	0	9,994	8,048
5075	Church of Our Saviour	Middleborough	159,835	11,349	0	11,349	7,487
5095	Grace Church	North Attleboro	165,058	12,012	0	12,012	8,212
5135	Bristol Trinity Episcopal Church	North Easton	100,712	3,840	0	3,840	5,928
5125	St. Thomas's Church	Taunton	194,876	15,799	0	15,799	30,873
3175	Trinity Church	Wrentham	133,054	7,948	0	7,948	7,068
				<b>89,968</b>	<b>0</b>	<b>89,968</b>	93,825
				<b>0</b>	<b>0</b>	<b>0</b>	
<b>TOTAL</b>	<b>ALL CONGREGATIONS</b>			<b>5,069,698</b>	<b>12,147</b>	<b>5,057,551</b>	4,703,968

## **INCOME FROM INVESTMENTS, ENDOWMENTS & OTHER SOURCES**

*See Appendix A, pages 51-63, for a summary of the history and use of endowments with tables showing market values and draws.*

The annual budget of our diocese is supported by various endowment funds. Endowment funds fall within one of three categories: Agency Endowment Funds; Trust Endowment Funds; and Bishop's Directed Funds.

Approximately 35% of total income in 2024 is in the form of draws from investments. All endowment draws are currently based on 4% of a 12-quarter rolling average balance. Some endowment funds, whether owned by the diocese or by the Trustees of Donations, are unrestricted and not subject to restriction or designation regarding the use of the income provided through appropriate draws. These unrestricted funds represent approximately 21% of total budget income. The remaining funds, representing approximately 14% of the budget, have some restriction on the use of the income, but in many cases the restriction is consistent with the regularly anticipated expenses of the diocese. There are a few funds, however, where the restrictions call for close monitoring and measurement. In some cases, not all available funds are utilized within a given year, resulting in surplus funds from an endowment that can build up over time. For 2024, the budget includes the use of \$83,667 from three restricted endowment funds with such an available surplus. Bishop's Directed Funds applied to the annual budget account for an additional 7% of the overall budget. Dividend and interest income account for an additional 1% of the total budget.

### **Agency Endowment Funds**

Agency Endowment Funds are a collection of funds owned outright by the diocese. The treasurer and Diocesan Council are ultimately responsible for the investment and use of these funds, though the Trustees of Donations serves as investment manager for most of the Agency Funds. Some of these "endowments" were established through fundraising efforts by the Diocese of Massachusetts, i.e. the Diocesan Advance Fund (DAF) in 1964, Adventure in Mission (AIM) in 1983 and the Global Mission Grant Fund in 2022 (with designated funds from the Together Now campaign completed in 2013). Some are Diocesan Council-designated funds, i.e. the "endowments" were established by Diocesan Council and therefore are considered "unrestricted" in that the council has the ability to "undesignate" at any time.

Diocesan Council relies on its Financial Advisory Committee to monitor these funds, and the council has in place a written Investment Policy Statement (see [www.diomass.org/inside/docs/investment-policy-statement](http://www.diomass.org/inside/docs/investment-policy-statement)). The spending policy draws from these funds are voted by either Diocesan Convention as part of the annual budget consideration or by Diocesan Council as needed during the year. In the audited financial statements of the diocese, the Agency Funds are included as "Investments" within the listing of Assets of the Diocese. As of June 30, 2023, the reported value of Agency Investments was \$34,104,801.

The proposed spending policy for 2024 is the same formula used by the Trustees of Donations: to draw 4% of a base that reflects the average of the market value over the past 12 trailing quarter average, calculated as of June 30, 2023. The total spending policy income available to the 2024 budget for Agency Funds is \$1,359,094, which is \$50,278 more than in 2023. The increase reflects the impact of market appreciation. The draw from two Agency funds, totaling \$18,336, is not budgeted in 2024, reducing the actual draw from Agency funds to \$1,340,758. One is the newly established Global Mission Grant Fund (with funds set aside from the Together Now campaign). The draw is being withheld to increase the fund value while other funds are used.

The second, the A.C. Bullard Fund, is under review as we seek to broaden the pool of potential recipients.

Diocesan Council has unrestricted access to several funds in the endowment; both principal and income can be spent if Council approves. Such draws above and beyond the normal 4% draw are not treated as annual budget income, thus flagging them as special actions in response to extraordinary circumstances. It is possible that some future strategic draw on the endowment could be needed if actual diocesan operations run at a significant deficit. Ideally, setting sufficient levels of reserves for adverse outcomes and maintaining strong financial controls throughout the year will prevent or minimize this type of supplemental draw.

Each fund has a history. Some are created by a gift or bequest, at times accompanied by a firm restriction or gentle guidance about the intended use of the gift. Some funds are designated by Diocesan Council; in these instances, future Council actions can revise or reverse the initial conditions applied. There are a variety of legal considerations, including what happens when the original intentions for a gift cannot be fulfilled. The Trustees of Donations and the chancellor of the diocese provide guidance when questions arise.

Our 2024 budget addresses expected needs of the diocese, consistent with fund restrictions and the mission of the diocese. Most diocesan income is from congregational assessments and unrestricted endowment income, so the issue of fund restrictions arises for just a small part of the budget. Furthermore, many restrictions are consistent with current needs.

### **Trust Endowment Funds**

Trust Endowment Funds are funds owned by the Trustees of Donations (TOD) which is an entity separate from the diocese. As the appointed trustee of these funds, the TOD manages the trusts according to conditions in the legal documents that created the trusts and identify the beneficiaries. The TOD controls the investment of these funds.

In 2024 the TOD will distribute 4% of a base amount defined as the average of the market value of each fund measured at the end of each calendar quarter from September 2020 through June 2023. As of June 30, 2023, the reported value of these trust investments was \$25,900,885.

There are a few circumstances which would require the TOD to deviate from the general spending policy formula. In certain cases, the distribution would be limited to dividend income produced by the fund, or, in other cases, all income must be reinvested for a specific period.

The total spending policy income available in 2024, \$1,029,122, is an increase of \$15,167 from 2023, primarily due to market changes.

Almost all of the trust funds for which the diocese is a beneficiary are owned and managed by the TOD. There are three other trust funds with different trustees, and the projected income from these trusts is included as trust dividends and other interest income.

The TOD is the legal owner of most of the relevant trust funds and is also the investment manager for most of the agency funds directly controlled by the diocese. The TOD's investment vehicles—the Diocesan Investment Trust (DIT) Stock Fund and the DIT Bond Fund, as well as

the Fossil Fuel Free Fund—are also available to individual congregations and other Episcopal organizations for their own agency funds. There are 147 DIT participants.

There are 28 seats for Trustees of Donations. Three trustees are diocesan officers, five are elected by Diocesan Convention, five are appointed by the bishop and 15 are elected by the trustees themselves. Additional information about the TOD is found at [www.trusteesofdonations.org](http://www.trusteesofdonations.org).

### **Interest and Dividends**

The estimate for 2024 dividend and interest income is \$133,240. Of this, approximately 76% is restricted. The other sources of income recorded here are three charitable remainder trusts not held by the Trustees of Donations. Interest income is primarily from clergy loans.

The diocesan portfolio also includes loans to congregations (separate from those made through the Stokes Fund loan program).

### **Bishop’s Directed Funds**

Within the business affairs of the diocese, as organized by its constitution and canons and legal incorporation within Massachusetts, the bishop diocesan is an officer of the diocese. There is no legally distinct entity distinguishing the office of the bishop from the diocese itself. However, there is a historical precedent and tradition within the Trustees of Donations to identify “the diocese” as the beneficiary of some trust funds and “the bishop” as the beneficiary of other trust funds. The latter group is known as the Bishop’s Directed Funds (BDFs).

Of the many funds owned by the Trustees of Donations, 30 funds with a market value of \$15,410,049 (as of June 30, 2023) are for the benefit of our diocese as determined by the bishop diocesan, and the Trustees of Donations provide an annual spending policy for these trusts. The generosity of past donors and the bishop diocesan makes it possible to fund new ventures in mission and mission initiatives through the diocesan budget.

The 2024 budget includes \$606,442 of income, primarily from Bishop’s Directed Funds but also includes \$24,000 from Bishop’s Discretionary Funds. The amount from Bishop’s Directed Funds represents all of the restricted draw and 85% of the unrestricted draw for the year. The other 15% is retained to support initiatives identified by the bishop diocesan during the year. Bishop’s Discretionary Funds, as opposed to Bishop’s Directed Funds, are generally not included in the annual budget. This year, however, \$24,000 is included to cover the cost of diversity, equity and inclusion consultants. Bishop’s Directed Funds in our diocese come from endowments established by many generous donors and entrusted to the bishop diocesan for distribution (see the details in Appendix A, pages 60-62). Discretionary funds for the bishops, by contrast, are akin to those for parish clergy and follow similar guidelines for appropriate charitable purposes. For a detailed explanation of clergy discretionary funds, see chapter five of the Manual of Business Methods in Church Affairs, available for download in English or Spanish at <https://www.episcopalchurch.org/finance-office/manual-of-business-methods/>.

## INCOME FROM OTHER SOURCES

Various other sources of income are estimated at 10% of total income for 2024.

	<b>2023 Budget</b>	<b>2024 Budget</b>
Property Rental	\$50,000	\$56,000
Unrestricted Contributions & Miscellaneous Income	\$324,800	\$274,800
Bishops' Annual Appeal	\$300,000	\$200,000
Mission Initiatives Revenue	\$413,050	\$122,558
Paycheck Protection Program (net)	\$0	\$0
Employee Retention Credit (net)	\$241,400	\$0
Cathedral Shared Use Repayment	\$184,000	\$0
In-kind Housing for the Bishop	\$53,100	\$55,170
Proceeds of Sale	\$150,000	\$150,000
<b>TOTAL OTHER INCOME</b>	<b>\$1,716,350</b>	<b>\$858,528</b>

### Property Rental

The diocese leases the closed All Saints' Church in Stoneham to the Boys and Girls Club of Stoneham and Wakefield.

### Unrestricted Contributions and Miscellaneous Income

An estimated \$274,800 in income is derived primarily from contributions from participants in diocesan events and programs.

### Bishops' Annual Appeal

Formerly known as the Annual Fund, the 2024 Bishops' Annual Appeal, to be held in the spring, has a goal set at \$200,000 to support our mission initiatives. This goal is reduced from the 2023 goal of \$300,000, due to reduced income from the appeal in recent years. If the Bishops' Annual Appeal generates more than its goal, the income requirements from other sources potentially could be reduced or the additional funds could be allocated elsewhere.

### Mission Initiatives Revenue

Fee income, grants and contributions from the Chinese Ministry and Life Together are budgeted at \$122,558 for 2024. This is reduced substantially from the 2023 budgeted figure of \$413,059, due to the forthcoming hiatus of the Life Together program. This line also includes \$42,000 for in-kind use of the Allston rectory by CRECHE.

## **Other Income**

We calculate the value of the housing for the bishop diocesan, as per Church Pension Fund guidelines, which is also reflected in the compensation figure on the expense side.

### **Proceeds from Closed Congregations**

The property of the former Church of the Good Shepherd in Fairhaven was sold in 2023. Diocesan Council voted to use \$150,000 in 2023 and \$150,000 in 2024 to fund the position of missionary for property stewardship. Council voted to use remaining funds from the sale to establish a property development seed fund to assist churches in the initial stage of exploring development of their properties. If development is successful, the expectation is that funds would be repaid with interest.

After several years of litigation concerning the removal and relocation of cremated remains from the property of the former Church of the Holy Spirit in Wayland, the Massachusetts Supreme Judicial Court in March 2023 ruled in favor of the Diocese of Massachusetts and the Coptic Christian Church which had purchased the property. This ruling paves the way for a resolution to this difficult matter. Monies generated by the closing and sale of the Church of the Holy Spirit and its rectory in Wayland have been frozen during the course of the litigation. Once the process of removing and relocating remains is completed, a final accounting will be made and use of the funds will be determined by Diocesan Council according to its policy for such funds.

The vestry of Grace Church in Everett voted in July 2023 to close the church as of Oct. 1, 2023. In the coming months, the Property Development Committee of the diocese will undertake a review of potential uses for the property, including development, lease, sale or retention for diocesan use.

## **EXPENSES**

The following charts provide detail for each area of the 2024 budget. Each area of the 2024 budget is shown along with the 2023 budget and the 2022 actuals (to be certified in our annual audit) for comparison.

The budget is divided into the following sections:

- Compensation and Benefits (page 29)
- Professional Fees and Consultants (page 30)
- Grants—Mission Initiatives (pages 31-40)
- Grants—Support for the Wider Church (page 41)
- Grants—Congregations, Clergy and Special Ministries (pages 42-44)
- Wider Church Assessments (page 45)
- Business and Property Maintenance Expenses (page 46)
- Reserves (page 47)
- Episcopate and Governance (page 48)
- Resources for Clergy (page 49)
- Resources for Congregations (page 50)

Tables for each expense area follow, accompanied by a narrative summary.

## Compensation and Benefits

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Bishop Diocesan	\$262,226	\$299,838	\$319,419
Bishop Suffragan/Assistant Bishop	\$216,137	\$283,142	\$235,790
Canon to the Ordinary	\$182,543	\$188,019	\$210,824
Support for Congregations	\$1,435,514	\$1,451,639	\$1,589,635
Administrative Services	\$512,922	\$860,202	\$861,908
Episcopate and Governance	\$379,339	\$285,111	\$292,321
Mission Initiatives Supported Staff	\$370,196	\$568,922	\$319,445
<b>Total Compensation and Benefits</b>	<b>\$3,358,877</b>	<b>\$3,936,873</b>	<b>\$3,829,072</b>

Our diocese is committed, under the leadership of the bishop diocesan, to organizing and recruiting a staff team that will further the goals of the mission strategy. This includes staff who are on diocesan payroll, listed in the chart above, as well as professionals and consultants who bring expertise in particular areas of our common life, listed in the next section on professional fees and consultants. It also includes effective programs, the budgets for which are detailed later in this budget booklet.

Our structure for diocesan staffing and program amplifies the mission strategy adopted by Diocesan Convention in 2021. Those commitments are described as goals and actions listed below, together with commitments on the part of individuals, congregations, the bishops and Diocesan Council, in the detailed mission strategy at [www.diomass.org/mission-strategy](http://www.diomass.org/mission-strategy).

1. Invite robust Christian formation at all points of life.
2. Nurture healthy communities where we can care for ourselves and each other.
3. Share the Good News.
4. Seek greater unity as members one of another.
5. Commit to our own growth as people who live in right relationship with one another.
6. Work together against the climate crisis.
7. Influence public policy by advocating for justice for all people and for the creation.
8. Communicate our progress regularly and transparently.

A roster of staff members is found in Appendix C on page 70.

Compensation and benefits for diocesan employees of mission initiatives are included in the Compensation and Benefits totals above. These include employees of Life Together; campus ministries at MIT, Boston College and Northeastern University; and clergy of the Boston Episcopal Chinese Ministry, all of whom are on diocesan payroll.

### Professional Fees and Consultants

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Information Technology	\$183,727	\$180,000	\$152,200
Accounting and Audit	\$485,262	\$110,000	\$51,000
Justice Initiatives	\$83,799	\$75,000	\$75,000
Legal Services	\$44,130	\$30,000	\$60,000
Other Consultants	\$84,268	\$176,000	\$175,000
<b>Total Professional Fees and Consultants</b>	<b>\$881,186</b>	<b>\$571,000</b>	<b>\$513,200</b>

Our diocese has engaged in contracts with professional firms and consultants to provide support for various areas of our common life. Included in this section are budgets for these contracted services, including managed information technology services; accounting and audit services and investment management; and legal services. Note that the line for Accounting and Audit has decreased substantially over the past two years as we have relied less on contractors and secured new auditors.

The \$75,000 for Justice Initiatives is funded by the draw and additional available funds from the John B. Coburn Endowment Fund (D7002C) and includes \$50,000 for the work of the Racial Justice Commission and \$25,000 for the Creation Care Justice Network.

The budget line for other consultants (\$175,000) includes human resources (\$5,000); development (\$45,000); diversity, equity and inclusion (\$24,000); archives (\$95,000); and investment management (\$6,000).

### Grants—Mission Initiatives

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Grace Church, Everett	\$37,000	\$38,000	\$0
Kids in Community, Lynn	\$25,000	\$0	\$8,000
St. Andrew's Afterschool, New Bedford	\$10,000	\$12,000	\$10,000
ProGente Connections, Framingham	\$15,000	\$20,000	\$20,000
St. Peter's, Waltham	\$30,000	\$30,000	\$23,000
Life Together	\$130,000	\$100,000	\$50,000
MIT Campus Ministry	\$127	\$3,300	\$3,300
Boston University Campus Ministry	\$83,688	\$83,688	\$94,247
BC / NU Campus Ministry	\$8,327	\$10,500	N/A
Boston College Campus Ministry	N/A	N/A	\$5,250
Northeastern University Campus Min.	N/A	N/A	\$5,250
Tufts University Campus Ministry	\$33,235	\$34,624	\$36,072
Grace Chapel, Brockton	\$92,850	\$80,000	\$75,000
St. Luke's-San Lucas, Chelsea	\$65,000	\$65,000	\$60,000
Christ Church / San Juan, Hyde Park	\$85,000	\$83,000	\$78,000
St. Stephen's, Boston	\$102,775	\$75,000	\$75,000
Chinese Ministry, Boston	\$4,351	\$30,050	\$20,000
St. Mary's, Dorchester	\$22,800	\$20,000	\$18,000
St. Peter's-San Pedro, Salem	\$65,000	\$65,000	\$60,000
Grace Church, Lawrence	\$54,000	\$60,000	\$55,000
St. Peter's/The Bridge, Dartmouth	\$35,000	\$40,000	\$40,000
St. Stephen's Youth Programs, Boston (B-PEACE/B-SAFE)	\$200,000	\$180,000	\$180,000
MANNA, Cathedral Church of St. Paul	\$30,000	\$20,000	\$23,500
The Crossing, Cathedral Church of St. Paul	\$23,750	\$23,750	\$23,500
Kaleidoscope Center for the Arts, St. John's, Lowell	\$12,150	\$15,000	\$8,400
Story Starters, St. Mary's, Newton Lower Falls	\$10,000	\$5,000	\$10,000
Christ the King, Lynn	\$10,000	\$15,000	\$10,000
Trinity Church, Haverhill	\$12,150	\$7,500	\$15,000
Food 4 Kids, Church of the Holy Spirit, Orleans (NEW in 2023)	N/A	\$10,000	\$8,000
QTPOC Church at Allston Abbey (NEW in 2023)	N/A	\$10,000	\$10,000

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
St. Bartholomew's, Cambridge (NEW in 2023)	N/A	\$10,000	\$10,000
University of Massachusetts—Dartmouth Campus Chaplaincy (NEW in 2023)	N/A	\$10,000	\$8,000
CRECHE (in-kind use of Allston rectory)	\$42,000	\$42,000	\$42,000
New Initiatives in 2024	N/A	N/A	\$30,000
<b>Total Mission Initiatives</b>	<b>\$1,239,203</b>	<b>\$1,198,422</b>	<b>\$1,114,519</b>

The total net 2024 budget for this area is \$1,114,519, compared to the 2023 net total of \$1,198,422. It is important to note that this chart only shows the diocesan grant to each initiative. Compensation and benefits for employees of mission initiatives who are on diocesan payroll are now included in the Compensation and Benefits chart on page 29. These include employees of Life Together; the MIT, Boston College and Northeastern University chaplaincies; and clergy for the Episcopal Boston Chinese Ministry. Before 2023, these compensation and benefits figures were reported in the Mission Initiatives chart. When compensation and benefits figures for mission initiatives personnel are included, the 2024 budget is \$1,442,808 compared to the 2023 budget of \$1,767,334. This reduction is due to the hiatus of Life Together in mid-2024 and reframing the position of MIT chaplain as a part-time position.

Fee income and contributions to certain mission initiatives are included in the appropriate income line. These include program revenue and funds raised for the Life Together program, contributions to the Episcopal Boston Chinese Ministry and in-kind use of the Allston rectory for CRECHE.

The decrease in the total grant figure reflects both a response to budget availability as well as the continuing growth of key mission initiatives into greater sustainability and self-sufficiency. While realizing that some very worthy mission initiatives may never achieve self-sufficiency, where it is achieved, it allows the diocese to promote the growth and impact of other initiatives. The Mission Initiatives Committee of the Diocesan Council is charged with seeking out ways to bring resources to the congregations, programs and chaplaincies funded through the diocesan budget, and bringing funding recommendations to Council, and to fund new initiatives through this budgetary process, as further outlined below.

Grace Church, Everett, whose vestry voted in July 2023 to close the church as of Oct. 1, 2023, is not funded in the 2024 budget.

With the following descriptions of each mission initiative, the Mission Initiatives Committee has included an indication of how the initiative aligns with diocesan mission strategy in which we commit to be **disciples of Jesus, seekers of justice** and **protectors of creation** (see the mission strategy summary on pages 7-8).

**Kids in Community, St. Stephen's Memorial Church, Lynn** (Seekers of Justice)  
 Kids in Community provides a safe, inclusive environment for children, especially those of the Black and Brown immigrant families who live in the neighborhood. Children participate in activities that provide artistic development, academic support and social-emotional growth. KIC seeks to employ staff who represent the cultures of the community and to provide representation

through books and arts activities. They also recruit literacy volunteers from nearby churches, especially St. Andrew's Church in Marblehead, to read with and to the children. Pre-pandemic, in 2019, the program served more than 100 local children. The stresses of the pandemic forced the program to suspend operations in February 2022, but it has reopened this year with 40 children. It plans to resume activities such as concerts, potluck dinners and cookouts which bring KIC families together with the St. Stephen's community.

**St. Andrew's Church, New Bedford Afterschool Program** (Seekers of Justice)

Through all the pressures of leadership transition and the pandemic, St. Andrew's evidenced adaptability, and focused first and foremost on its community and neighbors and their needs. These efforts led to three new programs: "Victorious Women," a Guatemalan women's support group, an Afghan women's support group and a cultural food prep program for local immigrants. St. Andrew's responds by getting to know the people, making connections, forming bonds and building trust that encourages people to participate. Over time, St. Andrew's has brought the joy of learning to hundreds of New Bedford's children, helped hundreds in the city suffering from food insecurity and embraced two groups of refugees who have experienced horrific events to build new lives in New Bedford, while honoring their heritage. This grant will help St. Andrew's to continue to live into our diocesan mission commitment of **seeking greater unity as members of one another** in engagement in this important gateway community.

**ProGente Connections, Framingham** (Seekers of Justice)

A grant of \$20,000 for 2024 helps continue ProGente's **support for marginalized and immigrant communities**, specifically work among the Brazilian community in Framingham, which originally began as part of the Metrowest Mission Hub. ProGente Connections is housed at St. Andrew's Church in Framingham, and is supported by Episcopal, Lutheran and Brazilian Presbyterian churches. ProGente provides Portuguese and English language classes and engages in immigrant advocacy and support, and it is helped greatly through its executive director and several members of its Board of Directors who are themselves Brazilian immigrants. ProGente has responded to this community's needs by adding more sections of its English classes and by creating classes and workshops to meet other specific needs, such as an upcoming course to prepare for the citizenship exam.

**St. Peter's Church, Waltham** (Disciples of Jesus)

Continuing diocesan support to this largely Ugandan congregation, which was received as a mission in 2018, will further the diocesan mission strategy of **exploring creative ways to engage its members**, in this case, funding a bilingual Book of Common Prayer in Luganda and English. The bilingual Book of Common Prayer will help in retaining youth and attract non-Luganda speaking congregants to help with church growth. With music being an important part of St. Peter's praise and worship, St. Peter's hopes also to retain a music director to train its choir. Funding to St. Peter's will continue **our commitment to multicultural ministries**.

**Life Together** (Disciples of Jesus, Seekers of Justice)

Life Together is a residential Christian formation program for young adults between the ages of 21 and 32 who work for social justice in nonprofit organizations and Episcopal churches across the diocese; they pursue their own formation through a Christian formation curriculum centered around prayer, spiritual practice, skill-based leadership training and community; and whose members live in intentional community with one another. Life Together continues to live into our mission strategy by **inviting robust Christian formation, discipleship, the nurturing healthy communities and seeking justice**. As noted in the Budget Overview section on page 11, the Life Together program will go on hiatus for a period of re-evaluation after the

current cohort completes its service in June 2024. *Note that compensation and benefits for Life Together personnel is reported in the Compensation and Benefits table as Mission Initiatives Supported Staff.*

#### **MIT Campus Ministry** (Disciples of Jesus)

The budget for the Lutheran-Episcopal campus ministry at MIT provides for a half-time Episcopal chaplain (the ELCA provides for a half-time chaplain as well). The Episcopal chaplain encourages students to reflect on and act on the ethical issues of their day consistent with the diocesan mission strategy of **inviting robust Christian formation at all points of life**, in this case, **growing disciples of Jesus** through prayer, study and spiritual practice. At the beginning of 2022, our former full-time Episcopal chaplain was appointed chaplain to the institute and became an employee of MIT. Beginning with the 2023-2024 academic year, a new part-time Episcopal chaplain will serve alongside a part-time Lutheran chaplain. The MIT campus ministry benefits from a restricted endowment, included in the table. *Note that compensation and benefits for the MIT chaplain is reported in the Compensation and Benefits table as Mission Initiatives Supported Staff.*

#### **Boston University Campus Ministry** (Disciples of Jesus)

The Boston University campus ministry budget provides for salary, expenses and benefits for a full-time Episcopal chaplain employed by Marsh Chapel at Boston University, supported through a diocesan grant of \$94,247. The Episcopal chaplain participates in the religious life of the university and provides worship opportunities in the Episcopal tradition, consistent with the diocesan mission strategy of **inviting robust Christian formation at all points of life**, in this case, **growing disciples of Jesus** through prayer, study and spiritual practice.

#### **Boston College - Northeastern University Campus Ministries** (Disciples of Jesus)

For many years, the chaplaincies at Boston College and Northeastern University have had a full-time chaplain dividing time between the two campuses. In the summer of 2023, the decision was made to separate the two chaplaincies into two part-time positions. The Episcopal Community at Boston College serves as a progressive Christian faith community at this Jesuit university. At Northeastern, the chaplain coordinates with the Center for Spirituality, Dialogue and Service to provide worship opportunities, pastoral care, service opportunities, spiritual formation and community. Our support to these chaplaincies is consistent with the diocesan mission strategy of **inviting robust Christian formation at all points of life**, in this case, **growing disciples of Jesus** through prayer, study and spiritual practice. A program grant of \$5,250 is provided to each campus. *Note that compensation and benefits for these chaplains is reported in the Compensation and Benefits table as Mission Initiatives Supported Staff.*

#### **Tufts University Campus Ministry** (Disciples of Jesus)

An amount of \$36,072 provides one-half of the compensation for the part-time Protestant chaplain, an Episcopal priest, at Tufts. This chaplaincy is an integral part of the Tufts University Chaplaincy and works in an inclusive and ecumenical way to **bear witness to the Gospel of Christ** as it is expressed in mainline Christian traditions, and especially the tradition of The Episcopal Church. While the spiritual needs and desires of students are identified in formal and informal ways, the Protestant chaplain also engages in conversations with students, faculty and staff to assess their spiritual needs, listen to their hopes and fears, and discover ways to respond in an effectively pastoral way. Our support to this chaplaincy is consistent the diocesan mission strategy of **inviting robust Christian formation at all points of life**, in this case through worship, reflection, fellowship and dialogue with peers from different backgrounds.

**Grace Chapel, Brockton** (Disciples of Jesus)

Grace Chapel, Brockton's multicultural Episcopal/Anglican faith community is committed to expressing the healing power of God's love. Its strongest programs are its Brigade Youth Program and its Abigail's Women's Project. The Abigail's program provides rest, connection and empowerment for women, most of whom are Black, immigrant single mothers working multiple jobs to provide for their families. Through the Brigade, youth are given the opportunity to imagine a different future for themselves by providing a space for them to discover their true identities and inherent worthiness. Grace Chapel became a mission of the diocese in 2018. Our support to Grace Chapel in Brockton is consistent with the diocesan mission strategy of **growth as disciples of Jesus** through prayer, study and spiritual practice, and through focusing on the areas that are most relevant for each community.

**St. Luke's-San Lucas, Chelsea** (Disciples of Jesus, Seekers of Justice)

A grant supports this congregation that seeks to bring Jesus' love to the community, both through multicultural and bilingual worship and outreach programs. St. Luke's-San Lucas is a growing community that reaches out with special services that reflect the ethnic traditions of its members. It engages other churches in the area by inviting them to participate in the administration of the thrift store, food distributions and community meals. St. Luke's-San Lucas continues to live into our diocesan mission strategy by **seeking greater unity as members of one another** in their engagement in this gateway community.

**Christ Church/Iglesia San Juan, Hyde Park** (Disciples of Jesus)

A grant supports Christ Church parish and Iglesia San Juan mission in Hyde Park, which have continued to engage the Hyde Park community to build and strengthen the congregation by focusing on youth. Through youth evangelism and engagement, the youth, and by extension the whole family, begin to re-learn other ways to be or become practicing Christians in the face of societal challenges. This congregation is faced with a lot of issues with its physical plant because, for over 40 years, there were no properly articulated updates to make its building meet today's energy standards, and as a result, the cost of maintenance is very high. Supporting Christ Church/Iglesia San Juan advances our diocesan mission strategy of **seeking greater unity as members of one another** in their engagement in this culturally diverse community.

**St. Stephen's Church, Boston** (Disciples of Jesus, Seekers of Justice)

In many ways, St. Stephen's has created a template for success in mission, and this year's grant recognizes the tremendous progress towards self-sufficiency and sustainability it has achieved. St. Stephen's is a diverse, multigenerational Christian community which enjoys a lively liturgy that incorporates a variety of styles and music. Services are conducted in Spanish and English. In conjunction with St. Stephen's Youth Programs (SSYP), a separately incorporated not-for-profit organization, youth programs and community organizing activities help to make the church a vital community resource and a model for faith communities seeking to live out their faith in service and in the struggle for justice. The continued support of St. Stephen's is consistent with our diocesan mission strategy of **seeking greater unity as members of one another** with engagement in culturally diverse communities. (See also St. Stephen's Youth Programs on page 37.)

**Episcopal Boston Chinese Ministry** (Disciples of Jesus)

Through diocesan mission initiatives funding, the Episcopal Boston Chinese Ministry (EBCM) has recently called the Rev. Ryan Lun, an ELCA clergyperson, to serve as pastor-in-charge. Activities have included virtual events such as hosting and celebrating significant Chinese festivals

and Christmas with members of the diocese; meeting with bishops and other diocesan members regarding current racial discrimination occurrences; once-a-week fellowship; and seasonal Bible study. EBCM members were able to stay connected and continue their spiritual growth through these services. This is a largely Cantonese-speaking congregation, and our support to EBCM is consistent with the diocesan mission strategy of **growth as disciples of Jesus** through prayer, study and spiritual practice. *Note that the compensation and benefits for the clergy is reported in Compensation and Benefits table as Mission Initiatives Supported Staff.*

**St. Mary's Church, Dorchester** (Disciples of Jesus, Seekers of Justice)

A grant of \$18,000 supports this congregation in Dorchester which is experiencing continued growth and moving toward self-sustainability. Worship in English and Spanish remains the heartbeat of St. Mary's congregation and ministries, and significant work at the church is carried out by volunteers, most of whom are members of the parish. St. Mary's continues to grow in its ability to cultivate collaborative ministry through partnerships. St. Mary's is also a template for success in mission and another example of what is possible through mission initiatives, and the continued support of St. Mary's is consistent with our diocesan mission strategy of **seeking greater unity as members of one another** with engagement in culturally diverse communities.

**St. Peter's-San Pedro, Salem** (Disciples of Jesus, Seekers of Justice)

St. Peter's-San Pedro attributes its success to prayerful study with its diverse vestry, to prayer and study among its dedicated parishioners, to constant deep listening with the Latino community of Salem and through racial justice resources provided by the diocese and deanery. St. Peter's-San Pedro partners with its deanery to offer racial justice and antiracism trainings in both English and Spanish, by incorporating racial justice awareness and action in its communications from the pulpit to the e-newsletter, and through its vestry leadership directing its actions as a parish. It has also responded by prayerfully and humbly serving neighbors in need with vital financial relief and **social justice advocacy**. The result has been greater unity and commitment throughout the congregation. A grant of \$60,000 for 2024 will help the St. Peter's-San Pedro congregation continue to serve its English and Spanish-speaking communities in Salem. Funding to St. Peter's-San Pedro will continue our mission commitment of **seeking greater unity as members of one another** with engagement in culturally diverse communities.

**Grace Church, Lawrence** (Disciples of Jesus, Seekers of Justice)

The \$55,000 grant for 2024 supports this English and Spanish-speaking congregation in Lawrence which has suffered a loss of main rental income that will impact its budget. Mission Initiatives funding is important for bridging this gap. This support is key, as the congregation hosts community events, sponsors activities for youth and feeds the hungry. Grace Church continues to live into our diocesan mission strategy of **seeking greater unity as members of one another** in their engagement in this gateway community.

**The Bridge, Dartmouth** (Seekers of Justice)

There continues to be a huge shortage of mental health services across the South Coast. The mental health needs of children, teens and adults have drastically increased in these communities and throughout the nation due to the pandemic. The Bridge has responded by filling this void and caring for God's people in the community and by working in collaboration with South-coast Hospital Group and Hawthorne Medical as well as many other community organizations. To help with the overload of the requests for services of children and teens, The Bridge collaborates with the Psych Nurse Practitioner Program at UMass Dartmouth and the Dartmouth Public Schools to host psycho-social programs for the children and families in the local school

system. The Bridge seeks to build a healthier community as an Episcopal institution on the South Coast. The \$40,000 grant for 2024, drawn from available funds for Special Needs grants, is for continuing support of this program and its **outreach to marginalized and immigrant communities**.

**St. Stephen's Youth Programs (SSYP), Boston** (Seekers of Justice)

The B-SAFE program is the summer enrichment component of the St. Stephen's Youth Programs. In collaboration with many Episcopal churches and church members as well as other volunteers and funding partners, B-SAFE offers summer enrichment programs in Boston serving elementary schoolers, providing middle schoolers with leadership and life skills education, and teens and young adults with professional development training and employment in the programs. A separate 501(c)3, Friends of St. Stephen's Youth Programs, supports the B-SAFE and B-PEACE programs and has its own set of financial controls and development efforts. B-SAFE continues to live into our diocesan mission strategy of **seeking greater unity as members of one another** in their engagement in this culturally diverse community.

Established by Diocesan Convention in 2012, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge campaign continues to live into our diocesan mission commitment to **participate in civic life** through community meetings, messages to government leaders and educational campaigns, **speaking and acting boldly for justice** and working together as congregations and **strengthening collaborations**.

**MANNA, Cathedral Church of St. Paul, Boston** (Disciples of Jesus, Seekers of Justice)

This grant supports the work of the MANNA (Many Angels Needed Now and Always) ministry with the homeless community in downtown Boston. MANNA seeks not only to welcome people across differences of class, wealth, culture, race and mental ability, but also to empower all people to claim their place as essential members of the community. MANNA continues to live into our diocesan mission strategy by **cultivating mutual relationships with people of other faiths, cultures, classes and racial backgrounds**, while building awareness of the differences in power that shape these connections.

**The Crossing, Cathedral Church of St. Paul, Boston** (Disciples of Jesus)

A \$23,500 grant is budgeted for 2024 to support the work of The Crossing. Its primary ministry is to provide a welcoming worship space for LGBTQIA+ and people in life transitions. It strives for inclusive language, lay leadership on par with clergy leadership and an all-encompassing welcome that communicates hope and a safe place for all. The Crossing continues to live into our diocesan mission strategy of **fostering mutually supportive relationships between clergy and lay leaders** and holding honest conversations about our expectations of one another, the sustainability of our ministries and appropriate boundaries.

**Kaleidoscope Center for the Arts, St. John's Church, Lowell** (Protectors of Creation)

Kaleidoscope is an afterschool arts program for children, where caring and talented adults work to inspire children to express themselves and communicate with others, from all backgrounds, in the common language of love. Great strides have been made by Kaleidoscope to bind the children into a community that reinforces that they are loved, capable and blessed. The Kaleidoscope program endeavors to instill in every child a sense of beauty of the great works of art that illuminate the magnificence of creation and presents art as a representation of God's creation within this physical world; an interpretation of reality based on an individual's perception; a human expression made to define the Divine in order to unlock and reveal God's work in all creation; to cherish God's wondrous works and protect their beauty. Our support of Kaleidoscope

is consistent with the diocesan mission strategy of cherishing the wondrous works of God and striving to **protect the beauty and integrity of all living beings**.

### **Christ the King Anglican Community Church, Lynn** (Disciples of Jesus)

Christ the King was received as a mission congregation of the Episcopal Diocese of Massachusetts at the Diocesan Convention in 2021. The congregation comprises mainly immigrants from East Africa, specifically Kenya, the majority of which are young parents with one or two children and most of them are students attending local colleges. They have a burden of raising their kids, and supporting the church. The congregation is currently supporting two clergy, one of which is a youth pastor. The congregation's mission is to reach families that reside in the city of Lynn and beyond to make Christ the King a home for many Anglicans who live the area, especially those immigrants from Africa and the Caribbean. Our support to Christ the King is consistent with the diocesan mission strategy of growth as **disciples of Jesus** through prayer, study and spiritual practice, and through focusing on the areas that are most relevant for each community.

### **Story Starters, sponsored by St. Mary's Church, Newton Lower Falls**

(Seekers of Justice) Story Starters supports families in discussing race and racism and empowers parents to effectively communicate their antiracist values to their young children. Story Starters targets the critical developmental window (ages 3-8) when parents are poised to have a significant impact on their children's beliefs about race. Over the course of their eight-week program, families learn researched-based methods and are provided with strategies and prompts to use these methods to guide conversations in their homes. During the past four years, Story Starters has been refining a home-based curriculum and gathering feedback along the way. In addition, some of its families participated in a longitudinal study with New York University in which their children were asked questions about friends and neighborhoods. From pre-test to post-test, participating children showed a statistically significant decrease in anti-Black bias, pointing towards the "lasting transformation" the diocesan mission strategy seeks. Our support to Story Starters is consistent with the diocesan mission strategy of **holding ourselves and one another accountable to our vision of a just community** and doing the hard work of **addressing the sins of racism and oppression in our midst**.

### **Trinity Church, Haverhill** (Seekers of Justice)

For the past two years, a grant has been provided to Urban Bridges, Inc., for Dinah's House, founded in 2015, supporting immigrants, elderly women and single mothers, primarily from the Latino community. Over the last two years, a Latino Ministry has developed organically at Trinity Church, beginning with a bimonthly weekday Spanish Eucharist and later expanding to include a bilingual church school coordinator/executive director of Dinah's House. Twenty-seven Latinos have begun worshiping at Trinity's increasingly bilingual Sunday Eucharist, with 12 baptisms. Clergy and lay leaders have begun to organize monthly Latino ministry meetings for discerning the community's needs, goals and dreams. The vestry is engaging in discernment about becoming a bilingual, bicultural church. Urban Bridges, Inc., now a separate 501(c)3 organization, has broadened its funding base and did not apply for a Mission Initiatives grant this year. This support of the growing Latino ministry at Trinity Church will help us continue to live into our diocesan mission strategy of **seeking greater unity as members of one another**.

### **CRECHE** (in kind)

The diocese has a multiyear lease agreement with the former Boston-Cambridge Mission Hub, now separately incorporated as the Charles River Episcopal Co-Housing Endeavor (CRECHE) for the use of in-kind use of the rectory at the former Church of St. Luke and St. Margaret in Allston as it develops intentional, multigenerational households in the metro-Boston area.

CRECHE is creating a network of mixed-income, intergenerational intentional communities in cooperation with The Episcopal Church. Its mission is to create a community-focused alternative to the for-profit housing market that is rooted in relationship and mutuality: co-housing communities in which people live like families, sharing meals, common spaces and the rhythms of home care. In addition to the community housed in the Allston rectory, CRECHE sponsors intentional communities in Dorchester and Newton. CRECHE is a collaborative effort between partner congregations Emmanuel Church, Boston; The Crossing, Boston; St. Mary's Church, Dorchester; Trinity Church, Newton Centre; and the Lutheran Episcopal Chaplaincy at MIT.

### **New Initiatives in 2023**

In the 2023 budget the Mission Initiatives Committee reserved \$40,000 for allocation to new mission initiatives. Applications were solicited and received, and four awards were made for 2023, and will continue with further funding in 2024. They are briefly introduced below.

#### **Food 4 Kids, sponsored by the Church of the Holy Spirit, Orleans**

Food 4 Kids (F4K) works to alleviate childhood hunger and promote literacy on outer Cape Cod by bringing together the Church of the Holy Spirit and other local communities to provide free meals and free books for children and teens in the summer when schools are not in session. F4K completed its 11th summer in 2023, serving free meals to 425 children and teens per day, on average, across the eight towns on outer Cape Cod—from Harwich to Provincetown. With a staff of six and the help of 112-plus volunteers, F4K prepared, packed, delivered and served 36,261 meals during the summer of 2022, including 1,597 breakfasts, 17,669 snacks and 16,995 lunches.

The F4K Steering Committee updated its mission statement to acknowledge and emphasize the important work of promoting literacy during the summer with a free book program. During the summer of 2022, F4K gave away more than 2,400 new books, carefully chosen to be age-appropriate and to speak to diversity and inclusion.

F4K relied on 17 child/teen-centered summer programs in the eight towns it serves. Those who can only drop in for a meal are always welcomed. For a list of F4K's partner sites, visit [www.food4kidscapecod.org/locations](http://www.food4kidscapecod.org/locations).

#### **QTPOC Church at Allston Abbey**

QTPOC Church (new name coming soon) is an emerging ministry, one of four strands of ministry at Allston Abbey, springing from and built for queer and trans people of color (QTPOC) in Greater Boston. They describe themselves as a group of disciples seeking to know and follow Jesus on his path to radical liberation for themselves and the world in ways that are unique to those who live at the intersections of identities marginalized by oppression and empire.

QTPOC Church is a small community still in discernment and envisions being a church that authentically and extravagantly celebrates queer and trans people of color being made in the image of God. QTPOC Church seeks wisdom from many streams of Christianity, including Anglicanism, in the worship of God; in preaching, teaching and learning about Jesus; and in following the Holy Spirit to do justice and love mercy in Greater Boston, including a desire to hold our Christian tradition accountable for its violence, exclusion and colonization.

QTPOC Church began in November 2021 with a small group of five QTPOC to begin exploring what this kind of community might look like. Beginning on Easter 2022, and continuing for the summer, QTPOC Church held a regular Sunday evening Eucharist, averaging a biweekly rhythm that drew in nine new people, all QTPOC. Of the 15 people who have meaningfully participated,

nine had little or no previous affiliation with The Episcopal Church. Presently, the QTPOC Church invites participants to reflect on how they are growing and being formed as Christians through a small group structure, often while sharing a meal together.

QTPOC Church is working to create a place which provides an environment of spiritual respite where they can discern, and have companions for, the work they are called to do, without feeling the need to represent their intersecting identities. It is their hope to become a self-sustaining stream of ministry within a self-sustaining Allston Abbey in the years to come.

### **St. Bartholomew's Church, Cambridge**

St. Bartholomew's has been in an interim time for the past three-plus years since the leave and subsequent retirement of its previous rector. The parish is entering the second year of a collaboration with St. Mark's Church in Dorchester, with both churches being led by a priest-in-charge, the Rev. Zachary Njogu Kinyua. St. Bartholomew's has received diocesan assistance through Bishop's Directed Funds (BDFs) for its first nine months of the collaboration, as well as support to St. Mark's through Strategic Curacy funds. Since support through BDFs is temporary, St. Bartholomew's requested funds to sustain its congregation while it researches and better understands other opportunities for funding (e.g., hall rental), sustainability (e.g., tithes, stewardship) and outreach (e.g., jazz concert, weekly meals). The support of a Mission Initiatives grant will assist St. Bartholomew's during this time of rebuilding.

### **University of Massachusetts - Dartmouth Episcopal Campus Ministry, Dartmouth**

The Episcopal Campus Ministry at the University of Massachusetts—Dartmouth is a new campus ministry program centered on providing students, faculty and staff an opportunity to embrace progressive Christianity and to be rooted in the Jesus Movement and the Episcopal Way of Love. The Episcopal Campus Ministry strives to engage students in social justice and service-oriented opportunities, with the goal of enabling students to love God, love others and become disciples. For example, it is collaborating with Bishops United Against Gun Violence to raise awareness about gun violence in our communities. Bishop Jim Curry, formerly bishop suffragan of Connecticut, has come to campus to offer his "Swords to Plowshares" event. There was an amazing turnout of students, faculty and staff who gathered to participate in this hands-on experience to raise awareness about the horror of gun violence.

The Episcopal Campus Ministry also seeks to influence public policy by advocating justice for all people and has partnered with Arnie's Cupboard, the student-run Food Pantry on campus, to support students, faculty and staff who are facing economic challenges. It also collaborates with the Frederick Douglass Unity House, an organization on campus to promote racial equality, to develop programs which help to create an awareness on campus about racial justice. The Episcopal Campus Ministry and Unity House hosted an event called "Faith and Racism," with Bishop Gayle Harris as the guest speaker. It is also working on outreach to the LGBTQ+ community on campus. By contrast, the other campus ministry programs at UMass Dartmouth are traditional, conservative and evangelical. The Episcopal Campus Ministry has built a bridge with the on-campus Center for Women, Gender and Human Sexuality so that students, faculty and staff experience the welcoming embrace of The Episcopal Church.

### **New Initiatives in 2024**

Going forward, the Mission Initiatives budget reserves a further \$30,000 allocation to new mission initiatives in 2024. The Mission Initiatives Committee will solicit applications in the coming months.

## Grants—Support for the Wider Church

	2022 Actuals	2023 Budget	2024 Budget
Mass. Scholarship for African Students Studying in America	\$0	\$14,249	\$14,541
Sustainable Development Grants	\$0	\$45,198	\$48,251
Episcopal City Mission	\$30,000	\$30,000	\$30,000
Native American Ministries	\$1,018	\$1,091	\$1,113
United Thank Offering	\$1,018	\$1,091	\$1,113
Massachusetts Council of Churches	\$45,000	\$45,000	\$40,000
<b>Total Wider Church</b>	<b>\$77,036</b>	<b>\$136,629</b>	<b>\$135,018</b>

Grants to support our connection with the Anglican Communion and ecumenical partners include:

**Massachusetts Scholarship for African Students in America**, providing scholarships from a restricted fund to assist students from the African continent studying in Massachusetts.

**Sustainable Development Grants** is an allocation of 0.7% of unrestricted diocesan income each year, in support of the UN Sustainable Development Goals for grants to partners in developing nations.

Restricted endowments held as Agency Funds are passed through to **Episcopal City Mission**, to **Native American ministries** (most recently the Navajoland Area Mission) and the **United Thank Offering**.

**Massachusetts Council of Churches** is a network of individuals, congregations and denominations convinced that what binds us together in Christ is stronger than what divides us. The Massachusetts Council of Churches proclaims the vitality of the Church in Massachusetts, working together for a vibrant, hopeful witness of our oneness in Christ in our local churches, on Beacon Hill and with our neighbors of other faiths.

## Grants—Congregations, Clergy and Special Ministries

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Mission Strategy Implementation	\$30,718	\$35,000	\$22,500
Asian-American Ministries	\$2,259	\$5,000	\$5,000
Congregational Development Targeted Grants	\$13,200	\$60,000	\$45,000
Bristol County Case Fund Grants	\$157,052	\$168,614	\$172,071
Congregational Development Open Grants	\$100,000	\$100,000	\$100,000
Special Needs Ministry Grants	\$0	\$33,887	\$34,582
Sending Serving Grants	\$32,009	\$48,000	\$48,000
House of Mercy Grants	\$31,322	\$39,018	\$39,812
Hispanic Ministries Grants	\$28,200	\$30,000	\$30,000
Strategic Curacies	\$119,370	\$123,906	\$130,101
African Ministries Grants	\$40,000	\$40,000	\$40,000
Barbara C. Harris Camp and Conference Center	\$30,000	\$30,000	\$30,000
St. Paul Center for Theology and Prayer	\$10,000	N/A	\$30,000
Pass-through Endowments** (see chart below for detail)	\$51,148	\$54,924	\$55,503
Sabbatical Grants to Clergy*	\$22,500	\$25,000	\$25,000
Scholarships for Clergy Dependents*	\$27,500	\$30,000	\$30,000
Clergy Continuing Education Grants*	\$5,374	\$10,000	\$10,000
Support for Retired Clergy*	\$4,498	\$13,702	\$13,000
Dill Campership	\$0	\$3,945	\$4,004
<b>Total Congregations, Clergy and Special Ministries</b>	<b>\$705,160</b>	<b>\$850,996</b>	<b>\$864,573</b>

\*Note that these grants are in addition to the programs listed in Resources for Clergy on page 49.

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
<b>Pass-through Endowments**</b>			
Emmanuel, Boston (D7001L)	\$8,481	\$8,979	\$9,113
St. John's, Sharon-Clergy Housing (D7002W)	\$22,193	\$24,139	\$24,189
Church Home Society (D7002R)	\$103	\$110	\$113
Christ Church, Plymouth (D8000W)	\$3,739	\$4,005	\$4,088
Emmanuel, West Roxbury (D7002Z)	\$4,599	\$4,923	\$5,027
BCH Camp (D7002O)	\$2,279	\$2,441	\$2,491
All Saints', Dorchester (10.77% of D7000B)	\$9,754	\$10,327	\$10,482
<b>Total Pass-through Endowments</b>	<b>\$51,148</b>	<b>\$54,924</b>	<b>\$55,503</b>

The **Mission Strategy Implementation** line is funding for the work of the Mission Strategy Committee. In the past three years the committee has awarded “Wicked Good Idea” micro-grants to congregations of our diocese. An amount of \$10,000 in the 2024 line item is to fund the work of the Collaborative Ministries Working Group.

**Asian/Multicultural Ministries** was established as a budget line in 2022 and is directed toward the support of Asian-American communities and ministries in our diocese.

**Congregational Development Targeted Grants**, awarded at the discretion of the regional canons, are funded at \$45,000, a reduction of \$15,000 based on actual spending in recent years.

**Bristol County Case Grants** are based on the draw from the Eliza Gray Case endowment (D7002T). The intended uses of the fund’s income when it was established as part of the diocesan endowment include service to Bristol County residents in need, as well as the general and religious purposes of the diocese.

**Congregational Development Open Grants**, awarded by a grants committee, are funded at \$100,000.

**Special Needs Ministry Grants** are budgeted at the full draw from the remainder of the diocesan agency fund (D7004H) that in previous years supported the St. Andrew’s of the Deaf congregation in Natick, which closed in 2011. The use of the proceeds is determined by Diocesan Council, which has designated the funds for persons with special needs. Due to a lack of applications in recent years, Council recently extended the scope of these grants to include mental health ministries.

**Sending Serving** and **House of Mercy Grants** are awarded by each of the 12 deaneries from two specific diocesan funds to support outreach activities. Deanery assemblies set the criteria and determine awards. Each deanery will have access to \$4,000 in 2024 for Sending Serving grants. These grants require a match from grant recipients and are open to any outreach activity. A total of \$39,812, divided among the deaneries, is available for House of Mercy grants, which require a focus on women and children in need (no match necessary). The funding source for the House of Mercy grants is agency endowment D7002Y.

**Hispanic Ministries** grants are designated to support Hispanic ministries in congregations.

**Strategic Curacies** provide one-and-a-half FTE positions for newly ordained or mentored clergy to serve in congregations where they will receive mentoring as part of their ongoing formation.

**African Ministries** grants are designated to support African congregations, including emerging congregations.

The **Barbara C. Harris Camp and Conference Center** receives a grant of \$30,000, together with the draw from a pass-through restricted endowment.

**The St. Paul Center for Theology and Prayer** began in 2023 as an initiative of the Cathedral Church of St. Paul and our diocese, in partnership with churches, clergy and lay leaders from around our diocese. Funded in 2023 through the Networking and Formation line of the budget, it is given a separate line for 2024 to more accurately reflect that it is a collaborative effort supported through this grant.

**Pass-through endowments to churches** are funded by restricted agency endowments which support grants to the entities listed in the Pass-through Endowments table on page 42.

**Sabbatical Grants for Clergy** come from two sources, an agency endowment fund in honor of Bishop Norman Nash and a Bishop's Directed Funds grant.

**Scholarships for Clergy Dependents** are designated from restricted Bishop's Directed Funds.

**Continuing Education for Clergy** grants are designated from restricted Bishop's Directed Funds for clergy continuing education.

**Support for Retired Clergy** is primarily from endowments which support two societies of our diocese. The Society for the Relief of Aged or Disabled Episcopal Clergy and the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Episcopal Church, separate 501(c) (3) organizations, both receive distributions from agency funds as well as from trust funds where the organizations are named as income beneficiaries. In addition to income from restricted endowment funds, the 2024 budget allocates \$13,000 for program and support expenses. Bishop's Directed Funds provide a portion of this funding.

**Dill Campership** represents the spending policy income of \$4,004 from a restricted Bishop's Directed Fund to support a scholarship to Camp O-At-Ka in Maine.

*Appendix B, beginning on page 64, provides a chart of grants made in 2022.*

For more information regarding grants and loans available to congregations, clergy and other ministries, visit [www.diomass.org/resources/grants-loans](http://www.diomass.org/resources/grants-loans) or see the grants brochure at [www.diomass.org/inside/docs/grants-and-loans-programs](http://www.diomass.org/inside/docs/grants-and-loans-programs).

### Wider Church Assessments

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
The Episcopal Church Assessment	\$770,000	\$802,990	\$774,150
Province I Assessment	\$16,179	\$16,179	\$16,179
<b>Total Wider Church Assessments</b>	<b>\$786,179</b>	<b>\$819,169</b>	<b>\$790,329</b>

The Diocese of Massachusetts, like every diocese in The Episcopal Church, pays an assessment for the staff, programs and operations of the Episcopal Church Center. The assessment formula (Canon I.4.6(b)) for the period Jan. 1, 2023, through Dec. 31, 2024, is adopted based on a single assessment of each diocese. In each year, 2023 and 2024, the diocesan total adjusted operating income, as reported in the annual diocesan financial report (Canon I.4.6(j) and Canon I.6.4) for the year two years prior to the year to which the assessment is applied [e.g., 2024 assessments are to be based on 2022 actual income figures], shall be reduced by a \$200,000 exemption. A single assessment shall be applied to the remaining amount (balance) at a flat rate of 15%. Based on the canonical formula, the Episcopal Church assessment in 2024 is budgeted at \$774,150, a decrease of \$28,840 from the 2023 figure of \$802,990.

We also contribute toward the program budget for Province I, which comprises the seven New England dioceses. The 2024 contribution is budgeted at level funding from 2023, \$16,179.

### **Business and Property Maintenance Expenses**

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Insurance	\$85,084	\$85,000	\$85,000
Property Maintenance	\$86,172	\$81,400	\$66,400
Cathedral Shared Use Expenses	\$482,975	\$385,646	\$308,000
Technology	\$76,644	\$105,289	\$95,000
<b>Total Business and Property Maintenance Expenses</b>	<b>\$730,875</b>	<b>\$657,335</b>	<b>\$554,400</b>

Included in this category are operational expenses to maintain the offices and properties of our diocese:

- Insurance is budgeted at \$85,000 for 2024, level funded from 2023.
  
- Maintenance costs for properties owned our diocese, including the residence of the bishop diocesan and the former St. Luke’s and St. Margaret’s Church, Allston, as well as the leased rectory of St. Mark’s Church, Dorchester which is the residence for Life Together fellows.
  
- Our cost-sharing agreement with the Cathedral Church of St. Paul, which owns the buildings at 138 Tremont Street, is reduced in 2024 due to our reduced office footprint in the building and ongoing relocation of archives. This figure includes an estimate of \$20,000 for office equipment and supplies, as well as office space on the fourth and fifth floors, third floor for six months of 2024 (anticipating archives relocation) and shared meeting space throughout the cathedral buildings.
  
- Technology encompasses both hardware and software.

## Reserves

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Depreciation-Equipment and Property	\$331,918	\$322,000	\$397,015
New Bishop Transition Reserve	\$30,000	\$30,000	\$30,000
Staff Sabbatical Reserve	\$8,000	\$8,000	\$8,000
Lambeth Conference Reserve	\$5,000	\$5,000	\$5,000
General Convention Reserve	\$18,000	\$18,000	\$18,000
<b>Total Reserves</b>	<b>\$392,918</b>	<b>\$383,000</b>	<b>\$458,015</b>

An amount of \$397,015, increased from the 2023 figure of \$322,000, will be added to a depreciation and reserve fund which is used to address major capital expenses. The figure used for depreciation brings the budget into compliance with the accounting principles used in our audits.

Additional reserves are maintained for expenses which occur periodically:

- The election of new bishops
- Sabbaticals for the bishops and eligible members of the diocesan staff
- The Lambeth Conference which gathers bishops of the Anglican Communion, usually once a decade
- The General Convention of The Episcopal Church which normally occurs triennially.

## Episcopate and Governance

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Diocesan Convention	\$104,597	\$70,000	\$70,000
Development Office	\$14,977	\$25,000	\$12,000
Episcopate Expenses	\$83,384	\$71,091	\$65,091
Assisting Bishops	\$0	\$10,000	\$0
Council and Committee Expenses	\$11,493	\$14,000	\$14,000
<b>Total Episcopate and Governance</b>	<b>\$214,451</b>	<b>\$190,091</b>	<b>\$161,091</b>

This section includes:

- Gross expenses for the annual Diocesan Convention  
*Note: The convention to be held in May 2024 for the election of the next bishop diocesan is to be funded from the reserve account for episcopal elections.*
- Office, printing and mailing expenses for our development office
- Business expenses for the bishops and canon to the ordinary
- Honoraria for assisting bishops (not funded in 2024)
- Expenses of diocesan governance bodies and committees

### Resources for Clergy

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Newly Ordained Clergy	\$16,989	\$18,000	\$20,000
Diaconate Program	\$15,517	\$24,000	\$24,000
Clergy Conference and Events	\$90,507	\$90,600	\$90,600
<b>Total Resources for Clergy</b>	<b>\$123,013</b>	<b>\$132,600</b>	<b>\$134,600</b>

Included in this section are programs which support the clergy of our diocese:

- A program for mentoring newly ordained priests, Making Awesome Parish Priests (MAPP) is supported through Bishop’s Directed Funds.
- The Diaconate program brings resources to the deacons of our diocese. The expense amount is budgeted to be offset by donations.
- Costs associated with the annual Clergy Conference and other events for clergy are significantly offset by registration fees. The figure in this chart is the gross amount budgeted.

*Note that in addition to these resources there are grants to clergy totaling \$78,000 (see Grants table on page 42).*

## Resources for Congregations

	<b>2022 Actuals</b>	<b>2023 Budget</b>	<b>2024 Budget</b>
Commission on Ministry / Seminarians	\$83,336	\$119,000	\$114,000
Networking and Formation Support	\$28,397	\$75,000	\$45,000
Youth and Young Adult Ministries	\$20,557	\$210,229	\$72,800
Multicultural Events	N/A	\$12,000	\$12,000
Operational Support for Congregations	\$42,391	\$72,500	\$62,500
Communications Office	\$7,383	\$31,500	\$31,500
Transition Ministry / Congregational Consultants	\$8,648	\$27,500	\$27,500
Deanery Support	\$12,550	\$22,800	\$12,000
<b>Total Resources for Congregations</b>	<b>\$203,262</b>	<b>\$570,529</b>	<b>\$377,300</b>

Included in this section are:

- Funding for the Commission on Ministry (\$65,000) and scholarships for seminarians (\$49,000). A small portion of the budgeted amount is offset by fees collected for certain matters, such as background checks, included in the income side of the budget.
- Our mission strategy, adopted at Convention in 2021, invites us to “robust Christian formation at all points of life.” Funds to support existing and emerging networks are included in this line, including our diocesan witness against gun violence. The lower budget for 2024 is due to the \$30,000 directed toward the St. Paul Center for Theology and Prayer, a formation program partnership between the Cathedral Church of St. Paul, our diocese and churches, clergy and lay leaders from around the diocese. See the table for Grants to Congregations on page 42.
- Diocesan youth and young adult programs are funded at \$72,800. This lower figure for 2024 is due to the elimination of office expenses for the Life Together program (\$47,429 in 2023) and reduced programming as the program builds back from the pandemic (\$50,000 both in expense reduction and lower fee income). There is a \$20,000 reduction that is offset by a \$20,000 increase reflected in the Compensation and Benefits chart on page 29 for a part-time assistant youth missionary, a position that is currently vacant. As programming is resumed, offset by fee income, we anticipate that there will be increases in budget and related income.
- A line item for events sponsored by the Office of Immigration and Multicultural Ministries is included in the 2024 budget at \$12,000.
- Operational support for congregations includes staff expenses related to work with congregations, based on prior-year spending, as well as \$5,000 to fund continuing education for personnel.
- Publishing, website and translation services for our Communications Office.
- Transition ministry support, including reimbursements and honoraria to congregational consultants who assist churches in transition.
- Expenses for deans and deanery Confirmation services, based on prior-year spending.

## **APPENDIX A: Summary of Endowment Funds and Investment Accounts**

*Agency endowments are funds owned by the Diocese of Massachusetts, overseen by the Diocesan Council and invested through the Trustees of Donations.*

*Two of these funds, designated with an asterisk, are not included in the 2024 budget draw, in one case because it is under review and, in the other, to allow the fund to grow while other available resources are used.*

*The Reserve Account is owned by the Diocese of Massachusetts, overseen by the Diocesan Council and invested with Fidelity. Trust endowments are owned and managed by the Trustees of Donations.*

*Note that the information presented here is based on primary and secondary sources. It should be viewed as our best information at this time, but not necessarily the final word or authority.*

### **AGENCY ENDOWMENTS**

*Note: Some of these endowments were established through fundraising efforts done by the Diocese of Massachusetts, i.e. Diocesan Advance Fund (DAF) in 1964 and Adventure in Mission (AIM) in 1983.*

<b><u>Account #/Name (Date received)</u></b>	<b><u>Value 6/30/2023</u></b>
D3025A: Ketchum Fund (1945) Account previously held by St. Luke's and St Margaret's, a parish which closed. Assets reverted to the diocese. Restricted for the poor and needy.	\$92,859
D7002C: John B. Coburn Endowment Fund (1986) The Rt. Rev. John B. Coburn served as 13th Bishop of Massachusetts, 1976-1986. Originally conceived as The John Bowen Coburn Chair of Theology for the Mission of the Church, a resource for visiting scholars to be present in congregations throughout the diocese, the Coburn Fund also is used to support theological programs and diocesan initiatives in ways that support congregational ministry. The Coburn Fund is currently used to support the work of the Racial Justice Commission and Creation Care Justice endeavors.	\$1,715,274
D7002D: C.L.T. Lee / B. Wong Fund (1988) To provide financial support for the development and strengthening of ministry among Asian Americans, especially financial assistance for persons to receive appropriate training to become leaders of Asian Christian congregations in the U.S.	\$156,834
D7002J: AIM / Hospital Ministry (1982) Income to be used to help provide a supportive Christian community in healthcare settings.	\$787,173
D7002L: Harriet G. Averill Fund (1976) One half of income to be paid to the United Thank Offering. One half of income is for Native American ministries.	\$54,619
D7002M: D A F Bishop Nash Fund (1971) Established to provide every year one clergy person, who has served at least 15 years in the diocese, a modest allowance for several months' travel and study. The Diocesan Advance Fund added to the endowment and, at present time, two clergypersons each year receive this benefit.	\$282,980
D7002N: Clergy Salary Fund (1967) A restricted fund established as a result of the Diocesan Advance Fund, the income of which is to be used to supplement clergy salaries in churches unable to provide adequate support. This fund also has been used for mortgage advances for clergy.	\$1,039,177

D7002O: A. E. Emery Camp Dennen Fund (1976)	\$61,119
From the will of Arthur Emery 'to the diocese of the use of Camp Dennen located at Cedarville,' since acquired by the Town of Plymouth. Income from the fund currently is used to provide a grant to the Barbara C. Harris Camp and Conference Center.	
D7002P: Frederic C. Lawrence / Rhinelander Fund (1968)	\$346,811
The Rt. Rev. Frederic C. Lawrence was bishop suffragan from 1956 to 1968. He also served as the chairman of the Bishop Rhinelander Foundation. Income initially was sent to the Bishop Rhinelander Foundation for support of the Harvard-Radcliffe chaplaincy. In recent years, the fund has supported campus ministry at MIT and the Life Together program, at the discretion of the bishop with the advice of Diocesan Council.	
*D7002Q: A. C. Bullard FD Students (1944)	\$306,864
This fund is now reclassified as an Agency endowment with the permission of the Trustees of Donations. Income to be used for needy students, chosen by the bishop, at Episcopal Divinity School who are doing work for Christ Church, Hyde Park. The diocese is petitioning the Attorney General for review of this fund and is requesting a broader interpretation of eligible seminarians, given the relocation of Episcopal Divinity School to New York City.	
D7002R: Caroline C. Haskett Fund (1978)	\$2,764
For the use of the Church Home Society to help orphaned children.	
D7002S: Adelaide R. Harris Fund (1978)	\$6,927
Memorial fund established by Maude I. Delhommeau for general purposes of the diocese.	
D7002T: The Eliza Gray Case TRS P E C (1926)	\$4,222,387
Originally the Eliza Gray Case Home, established for the widows and female orphans of clergy. When the home was sold, \$400,000 was donated to Trinity Church Home, now Sherrill House. Income from Case Trust is to be used to assist elderly residents at Sherrill House, and for purposes in southeast Massachusetts. Grants are overseen by the Bristol Case Fund Committee.	
D7002U: Campus Ministries Fund (1982)	\$326,913
Restricted fund established as a result of the Diocesan Advance Fund campaign, to support chaplains and programs in higher education.	
D7002W: Amelia Grant Schwarz Fund (Trust) (1947)	\$577,766
Income restricted to St. John's, Sharon for clergy housing costs.	
D7002Y: House of Mercy Fund (1969)	\$976,846
In December 1975, the Association for the Works of Mercy was legally dissolved and the assets turned over to the diocese. The Massachusetts Supreme Court decree states that the funds are to be maintained for the care and relief of women in need.	
D7003A: The Jessie B. Cox Fund (1980)	\$1,076,881
Income to be used to provide fellowship grants for deacons and other recently ordained clergy in training for one or two years, often in critical mission situations, under the supervision of an experienced clergy person. Also known as the Cox Fellows Fund.	
D7003B: William B. Tripp Memorial Fund (1987)	\$1,379,282
To support the position and program of the diocesan youth missionary, who will coordinate youth networks and groups and provide training and resources to adult advisors working with young people.	
D7003C: AIM Christian Witness in Education (1981)	\$1,302,377
Adventure in Mission fund, income to be used for Christian witness in educational communities.	

D7003D: Maurine C. Coburn Trust	\$232,834
A restricted fund in the Bishop's Directed Fund, the income of which is to be spent for the assistance of the clergy at the discretion of the bishop.	
D7003E: Youth on Mission (1981)	\$246,840
Funding provided to Adventure in Mission (AIM) for ministry with young people. Income to be used for the financial assistance to young people so that they may participate in conferences and other programs of the diocese, wider church and ecumenical youth organizations.	
D7003F: AIM William Coolidge Endowment FD (1983)	\$5,138,737
Income to be used for grants to parishes to support missionaries building new or renewed congregations in existing parishes, for the ministry among immigrant communities and for community ministries.	
D7003R: W. Chisolm Fund (1995)	\$127,576
Income only to be used at the discretion of the bishop and Diocesan Council. Trust under the will of Wallace Chisolm.	
D7004K: Elizabeth Bradford Storer & Florence Bartlett Storer Memorial Fund (2020)	\$690,257
Unrestricted	
*D7004L: Global Mission Grant Fund	\$481,549
This fund was established with \$500,000 of unspent mission tithe funds from the Together Now campaign to support global partnerships. Another account holds the balance of mission tithe funds, to be used over the next five to seven years, allowing the new endowment to build for future use.	
D8000T: Frederick A. Reeve Fund (1991)	\$300,611
Income to be used at the discretion of the bishop.	
D8000V: Thomas M. Coffin Fund (1939)	\$178,193
Income for needy churches in diocese.	
D8000W: Abby Jackson Fund (1939)	\$100,305
Restricted for clergy compensation at Christ Church, Plymouth.	

## COUNCIL DESIGNATED FUNDS

*Note: These “endowments” were established by Council and therefore are considered “unrestricted” from a technical sense in that Council has the ability to “un-designate” at any time.*

D7002E: African Scholarship Fund (1988) \$356,818  
Diocesan Council authorized the establishment of an endowment fund for a scholarship program for African students (also known as MSASA). The bishop, with the approval of Council, is responsible for the scholarship program and allocation of endowment income within the program guidelines.

D7002G: Endowment for Maintenance (1990) \$275,761  
Diocesan Council minutes from the Dec. 7, 1989, meeting report a vote “to set aside 1/3 of all new unrestricted gifts over \$1,000 in an endowment for building maintenance and repair, until this endowment reaches \$500,000.”

D7002X: General Endowment Fund (1960) \$3,055,312  
Unrestricted gifts and bequests are combined in the General Endowment Fund. No invasion of principal is possible without a vote of the Diocesan Council (May 1978 vote of Council). In recent years, Diocesan Council has voted to withdraw funds to help pay for the recent and future episcopal elections and transitions, to establish reserves for property and equipment maintenance, to acquire a residence and fund mortgages for the bishops and to help pay for renovations to the 138 Tremont Street, Boston buildings maintained by the Cathedral Church of St. Paul. This fund is also currently designated as the primary investment account for unrestricted bequests and gifts. Additions are reported annually to the Diocesan Council and its Financial Advisory Committee.

D7002Z: Endowment Fund - Roslindale (1960) \$123,356  
Endowment fund for Our Saviour, Roslindale, which closed in 1987. When Council initially received these funds in 1992, it set a policy, continued since then, to provide half of the annual draw to Emmanuel, West Roxbury and the other half for diocesan programs. In 2011, half of the fund proceeds were transferred to the Fund for Congregational Vitality, and subsequent budgets have granted the full draw from this fund to Emmanuel.

D7004E: Seminarian Education Endowment FD (2001) \$1,729,826  
Endowment established to support seminarian education.

D7004H: Deaf Ministry Endowment (2003) \$848,550  
Originally established by Diocesan Council as an endowment fund for ministry among deaf persons, Council has since broadened the scope of the fund to include special needs ministries. This fund stems from one-half of the resources of the closed congregation, St. Andrew’s of the Deaf, Brookline.

D7004I: Fund for Congregational Vitality \$5,291,149  
This fund was initially established in 2011 with half of the net proceeds from nine closed congregations. Since then, Council has followed the same policy of putting a portion of proceeds from other closed congregations into this endowment fund. In addition, Council has consolidated existing endowment funds that were also created through the proceeds of closed congregations going back to the mid-1980s. The spending draw from this fund helps pay for the congregational grant programs.

D8000X: Bishop’s Entertainment Fund (1969) \$215,276  
Income only to be made available to the bishop and bishop’s spouse for expenses involved in providing hospitality for clergy of the diocese and their families and for the entertainment of visitors. In recent years this income has subsidized the annual diocesan clergy conference.

<b>AGENCY ENDOWMENTS</b>		<b>Market Value of Fund - 6/30/2023</b>	<b>4% Draw</b>
D3025A	KETCHUM FUND	92,859	3,752
D7002X	GENERAL ENDOWMENT FUND	3,055,312	124,682
D7002C	JOHN B COBURN ENDOWMENT FUND	1,715,274	69,901
D7002D	C.L.T. LEE / B. WONG FUND	156,834	6,391
D7002E	AFRICAN SCHOLARSHIP FUND	356,818	14,541
D7002G	ENDOWMENT FOR MAINTENANCE	275,761	11,238
D7002J	AIM / HOSPITAL MINISTRY	783,173	31,916
D7002L	HARRIET G AVERILL FUND	54,619	2,226
D7002M	D A F BISHOP NASH FUND	282,980	11,532
D7002N	CLERGY SALARY FUND	1,039,177	42,349
D7002O	A E EMERY CAMP DENNEN FUND	61,119	2,491
D7002P	FREDRICK C LAWRENCE/RHINELANDER FUND	346,811	14,133
D7002Q	AC BULLARD FD STUDENTS	306,864	12,027
D7002R	CAROLINE C HASKETT FUND	2,764	113
D7002S	ADELAIDE R HARRIS FUND	6,927	282
D7002T	THE ELIZA GRAY CASE TRS P E C	4,222,387	172,071
D7002U	CAMPUS MINISTRIES FUND	326,913	13,322
D7002V	AMELIA GRANT SCHWARZ FUND	577,766	24,189
D7002Y	HOUSE OF MERCY FUND	976,846	39,812
D7002Z	ENDOWMENT FUND - ROSLINDALE	123,356	5,027
D7003A	THE JESSIE B COX FUND	1,076,881	43,885
D7003B	WILLIAM V. TRIPP JR. MEMORIAL FUND	1,379,383	56,209
D7003C	AIM CHRISTIAN WITNESS IN EDUC	1,302,377	53,075
D7003D	MAURINE C COBURN TRUST	232,834	9,488
D7003E	YOUTH ON MISSION	246,840	10,059
D7003F	AIM WILLIAM COOLIDGE ENDOWMENT FD	5,138,737	209,414
D7003R	W. CHISOLM FUND	127,576	5,199
D7004E	SEMINARIAN EDUCATIONAL ENDOWMENT	1,729,826	70,494
D7004H	DEAF MINISTRY ENDOWMENT	848,550	34,582
D7004I	FUND FOR CONGREGATIONAL VITALITY	5,291,149	209,414
D7004K	STORER MEMORIAL FUND	690,257	24,728
D7004L	GLOBAL MISSION GRANT FUND	481,549	6,309
D8000T	FREDERICK A REEVE FUND	300,611	12,250
D8000V	THOMAS M COFFIN FUND	178,193	7,262
D8000W	A. JACKSON FUND	100,305	4,088
D8000X	BISHOPS ENTERTAINMENT	215,276	8,773
<b>TOTAL ENDOWMENT VALUE AND DRAW</b>		<b>\$34,104,801</b>	<b>\$1,359,094</b>
<b>Less undrawn funds</b>			<b>-\$18,336</b>
<b>TOTAL BUDGETED DRAW</b>			<b>\$1,340,758</b>

## TRUST ENDOWMENTS

D1140I: Norden Memorial Fund (from closure of St. Paul's Church, Peabody) (1999) \$49,626  
 The income or interest of the trust is disbursed to the Sabbatical Education Fund of the Diocese of Massachusetts.

D1150B: St. Paul's Church, Revere (church closure) (1945) \$26,648  
 Per Commonwealth of Massachusetts Office of the Attorney General dated April 4, 2019, income can be used at the bishop's discretion for the benefit of other churches and parishes of the Episcopal Diocese of Massachusetts located within a five-mile radius of Revere, Massachusetts.

D1175A: Joel Foote Bingham Fund (from closure of All Saints', Stoneham) (1984) \$145,225  
 Per Kaiser Law Group letter dated July 9, 2018, income should be used to benefit any mission of the diocese at the bishop's discretion. However, if in the future a mission is re-established in Stoneham, the fund shall at that point be restricted and held exclusively for the benefit of that mission.

D1175B: Blanche Marcy Fund (from closure of All Saints', Stoneham) (1979) \$275,838  
 Per Kaiser Law Group letter dated July 9, 2018, income from the fund may be used at the discretion of the bishop.

D2110A: Sarah A. McAllister Fund (from closure of St. George's, Maynard) (1934) \$4,265  
 Per trust agreement and letter from Choate Hall & Stewart on March 29, 2010, to be used for building repairs at neighboring churches at the discretion of the Trustees of Donations.

D2110B: G & S Turner Memorial Fund (from closure of St. George's, Maynard) (1955) \$17,877  
 Cy Pres judgment dated Sept. 15, 2011, to be held by the Trustees of Donations for the benefit of churches and parishes designated by the bishop.

D2130A : Sarah T. Weaver Fund II (from closure of Christ Ch., Somerville) (1923/1946) \$195,798  
 Per Kaiser Law Group letter dated April 26, 2017, income shall be used for the benefit of parishes and ministries in nearby towns including Cambridge, Medford, Malden and Arlington, as designated by the bishop. In the case of distributions made for ministry activities, the income of the fund shall be used approximately 1/3 for educational activities, 1/3 for worship-related expenses or other expenses, and 1/3 to be used at the discretion of the diocese.

D4065A: St. Matthew's Endowment FD (1925) \$195,546  
 D4065B: Samuel & Emma Downing FD (1937) \$10,305  
 D4065C: Joseph C. Storey Fund (1915) \$113,479  
 D4065D: Mary A. Wilson Fund (1935) \$59,761  
 D4065E: A. Smith Fund for Rectory Maintenance (1896) \$86,559  
 D4065G: Martha Terry Fund (1827) \$363  
 (all from closure of St. Matthew and the Redeemer, South Boston)  
 Cy Pres judgment dated Sept. 15, 2011, funds to be held by the Trustees of Donations for benefit of churches and parishes designated by the bishop.

D5015A: A. E. Gove Memorial Fund (from the closure of St. Paul's, Brockton) (1961) \$33,440  
 Commonwealth of Massachusetts Office of Attorney General determined on Aug. 4, 2016, that the net income of the fund shall be paid for the benefit of all churches and parishes of the Episcopal Diocese of Massachusetts as designated by the bishop for their general charitable purposes.

D5015C: Frank H. Burnett Fund (from closure of St. Paul's Church, Brockton) (2001) \$70,283  
 Letter from Kaiser Law Group on June 5, 2017, indicating that the fund shall be paid for the benefit of the Diocese of Massachusetts. The net income of the fund shall be used for educational purposes as may be determined by the proper officers of the diocese.

D8050B: Katherine K. Abbott Fund (closed chapter, Episcopal Church Women) (1919) Per Kaiser law group letter dated Aug. 3, 2017, net income shall be paid to support missionary activities, programs and work performed exclusively by women within the diocese. Such missionary activities, programs and work shall include preaching, evangelism, education and other activities intended to encourage, assist and persuade others, including men and women, to follow, abide by or develop an interest in the teachings of Christ, The Episcopal Church and the diocese. These missionary activities, programs and work shall be selected in the discretion of the bishop.	\$161,329
D7000A: Diocesan Endowment Fund (1950) Endowment Fund for general purposes.	\$5,982,484
D7000B: Vote of Corporation (1987) General purposes per vote of Corporation. Several trust funds were combined into this in 1987.	\$2,377,105
D7000D: Fay Donation I (1885) Income to be used to aid in building new churches, repairing old churches or extinguishing church debts. Reviewed by Hemenway & Barnes.	\$310,387
D7000I: Churches and Chapels Fund (Vote of Corporation) (1875) Originally created as the Fund for the Erection of Churches and Chapels. In 1965, Diocesan Convention approved terms for distribution: income may be used to assist needy parishes and missions in the erection, alteration or rebuilding of churches or chapels. Reviewed by Hemenway & Barnes.	\$115,081
D7001E: Appleton Fund (1847) Income to be used as a portion of the salary for the clergy in charge of St. Stephen's Church, Boston.	\$64,415
D7001F : Bishop's Fund (1810) For the purpose of supporting the bishop.	\$1,511,306
D7001G: Bishop of MA Salary Fund (1955) Income to be applied toward the salary of the bishop.	\$190,288
D7001H: Bishop's House Fund (1874) For the housing of the bishop.	\$312,356
D7001I: Suffragan Bishop's Fund (1913) Income to be used for the support of a bishop suffragan for all episcopal services not covered by the original Bishop's Fund.	\$1,223,090
D7001J: Camilla Davenport Fund (1945) To apply income to the Diocese of Massachusetts for global partnerships.	\$47,908
D7001K: Cornelia A. French Fund (1946) Income to be used for the support of the diocesan house, and if not, then the cathedral.	\$1,071,000
D7001L : Katherine French Fund (1948) Income designated for Emmanuel Church, Boston.	\$222,597
D7001O: Ethel A. Clark Fund (1979) Income only to be used for the supply of clergy for needy parishes or for aiding in the maintenance of the ministry of such parishes.	\$1,467,082
D7001Q: Mary K. D. Babcock FD I (1947) Half for the diocesan libraries, half to the Diocesan Board of Missions for a permanent fund to be known as the Bishop Babcock Fund.	\$340,796

D7001R: Mary K. D. Babcock FD II (1949)	\$42,533
Income to be applied toward the work of the Parish Historians Department or the diocesan library, including the cost of meeting of parish historians and other expenses incidental to the conduct of such work.	
D7001S: Julia K. Davey Fund (1948)	\$105,913
Income for the general maintenance of the diocesan library.	
D7001T: William C. Winslow Fund (Vote of Corporation) (1948)	\$15,519
Income for the purchase of periodicals, journals and stationery for the diocesan house.	
D7001W: Works of Mercy Harvison Fund (1945)	\$57,309
Income to be used in support of the Association for the Works of Mercy. In December 1975, the Association for the Works of Mercy was legally dissolved and the assets turned over to the diocese. The MA Supreme Court decree states that the funds are to be maintained for the care and relief of women in need.	
D7001X: Amy Yeames Fund (1957)	\$68,760
After death of donor, income to be used to benefit residents of the Eliza Gray Case Home.	
D7001Y : Edith Munro Fund (1960)	\$30,031
After death of donor, income to be used to benefit residents of the Eliza Gray Case Home.	
D7003X: Patton Memorial Fund (1998)	\$1,562,554
Income to be used for general purposes of the diocese.	
D7004B: Patton Fund for Maintenance (2000)	\$128,868
Transferred from Patton Memorial Fund, as per Diocesan Council mandate to separate a percentage of all unrestricted gifts to an Endowment Fund for Maintenance. See Endowment Fund for Maintenance (D7002G) under Council Designated Funds.	
D7004C: Katherine M. Foster Trust (2001)	\$271,964
To the bishop and trustees, with request that income be used to help and assistance of small parishes.	
D7004D: Frank H. Burnett Fund (2001)	\$56,301
To be used for educational purposes as may be determined by the proper officers of the diocese.	
D9000Z: Abby Brown Trust (Vote of Corporation) (1990)	\$225,649
Income to be used for "general charitable and religious purposes."	
D9001B: Edmund F. Slafter Fund II (1906)	\$282,607
Half of income to be given to registrar of diocese. Half of income to be given to the librarian of the Episcopal Theological School for the increase and enrichment of the library of said school. Appropriate uses for this endowment currently are under review.	
D7000G: Benjamin Leeds Fund (1914)	\$6,370,639
Income to be used for 1) building and support of mission churches; 2) for the relief of aged and indigent clergy; 3) Society for Relief of Widows and Orphans of deceased clergymen; and 4) for St. Luke's Home for Convalescents in Roxbury. Reviewed by Hemenway & Barnes. Twelve percent of the distributions gets paid directly to the Sherrill House (formerly St. Luke's Home for Convalescents, Roxbury). Sherrill House is a separate entity from the diocese. The diocese receives the remaining 88% distribution from this fund, which is further allocated to both the diocese and societies (for which the diocese is fiscal sponsor).	

<b>TRUST ENDOWMENTS</b>		<b>Market Value of Fund - 6/30/2023</b>	<b>4% Draw</b>
D1140I	NORDEN MEMORIAL FUND	49,626	2,032
D1150B	ST. PAUL'S CHURCH REVERE	26,648	1,092
D1175A	JOEL FOOTE BINGHAM FUND	145,225	5,946
D1175B	BLANCHE MARCY FUND	275,838	11,293
D2110A	SARAH A MCALLISTER FUND	4,265	175
D2110B	G & S TURNER MEMORIAL FUND	17,877	732
D2130A	SARAH T WEAVER FUND II	195,798	8,016
D4065A	ST MATTHEWS ENDOWMENT FD	195,546	8,006
D4065B	SAMUEL & EMMA DOWNING FD	10,305	422
D4065C	JOSEPH C STOREY FUND	113,479	4,646
D4065D	MARY A WILSON FUND	59,761	2,447
D4065E	A SMITH FUND FOR RECTORY MAINTENANCE	86,559	3,544
D4065G	MARTHA TERRY FUND	363	15
D5015A	AE GOVE MEMORIAL FUND	33,440	1,369
D5015C	FRANK H. BURNETT FUND	70,283	2,877
D7000A	DIOCESAN ENDOWMENT FUND	5,982,484	244,932
D7000B	VOTE OF CORP DIOCESAN FUND - VOC	2,241,154	95,887
D7000D	FAY DONATION I	310,387	12,708
D7000G	BENJAMIN LEEDS FUND - VOC	6,370,639	229,527
D7000I	CHURCHES AND CHAPELS FUND - VOC	115,081	4,712
D7001E	APPLETON FUND	64,415	2,637
D7001F	BISHOP'S FUND	1,511,306	61,875
D7001G	BISHOP OF MA SALARY FUND	190,288	7,791
D7001H	BISHOPS HOUSE FUND	312,356	12,788
D7001I	SUFFRAGAN BISHOPS FUND	1,223,090	50,075
D7001J	CAMILLA DAVENPORT FUND	47,908	1,961
D7001K	CORNELIA A FRENCH FUND	1,071,000	43,848
D7001L	KATHERINE FRENCH FUND	222,597	9,113
D7001O	ETHEL A CLARK FUND	1,467,082	60,064
D7001Q	MARY K D BABCOCK FD I	340,796	13,953
D7001R	MARY K D BABCOCK FD II	42,533	1,741
D7001S	JULIA K DAVEY FUND	105,913	4,336
D7001T	WILLIAM C WINSLOW FUND - VOC	15,519	635
D7001W	WK OF MERCY HARVISON FUND	57,309	2,346
D7001X	AMY YEAMES FUND	68,760	2,815
D7001Y	EDITH MUNRO FUND	30,031	1,229
D7003X	PATTON MEMORIAL FUND	1,562,554	63,973
D7004B	PATTON FUND FOR MAINTENANCE	128,868	5,276
D7004C	KATHERINE M. FOSTER TRUST	271,964	11,135
D7004D	FRANK H. BURNETT FUND	56,301	2,305
D8050B	KATHERINE K ABBOTT FUND	161,329	6,605
D9000Z	ABBY BROWN TRUST - VOC	225,649	9,238
D9001B	EDMUND F SLAFTER FUND II	282,607	11,570
<b>TOTAL</b>		<b>\$25,900,885</b>	<b>\$1,029,122</b>

**BISHOP'S DIRECTED FUNDS  
(Unrestricted)**

D8000D: Maria A. Appleton Dodge Fund (1970) Income to be split two thirds to the discretionary fund to aid for clergy and one third to diocesan scholarship program in the assessment budget.	\$1,916,791
D8000J: Thomas Nelson Memorial Fund (1898) Income to be used at discretion of the bishop for charitable or mission work, preferably by aiding the poorer clergy.	\$26,589
D8000K: H. S. Payson and Florence Rowe Fund (1963) Income to be used at discretion of the bishop for missionary purposes.	\$26,704
D8000L: Valentine Slatery Fund (1940) Income to be used at discretion of the bishop for general purposes of the churches in the diocese.	\$23,956
D8000P: Amelia Worthington Fund II (1951) Income to be used at discretion of the bishop for diocesan missions, and for such other purposes as the bishop may deem most advantageous for the welfare of the diocese.	\$730,183
D9000M: Sarah H. A. Burnham Fund (Vote of Corporation) (1936) Income to be used by the bishops and trustees for the general purposes of the diocese.	\$2,011,438
D9000Q: Eliza S. Hatfield Fund (Vote of Corporation) (1970) Income paid at the discretion of the bishop and Trustees of Donations for needy parishes or other purposes.	\$1,489,864
D9000S: Frances S. Parker Fund (Vote of Corporation) (1965) For general expenses in accordance with a vote of the bishop and trustees.	\$818,254
D9000U: Agnes Winslow Riley Fund (Vote of Corporation) (1972) No restrictions. Reviewed by Hemenway & Barnes.	\$414,469
D9000V: Sarah L. Slattery Fund (Vote of Corporation) (1972) For the general purposes of the diocese. Reviewed by Hemenway & Barnes.	\$146,166
D9000X: Francis L. Whittemore Fund (Vote of Corporation) (1973) No restrictions.	\$171,976
D9000Y: Robert E. Townsend Trust (Vote of Corporation) (1988) No restrictions or designation for use were stipulated.	\$101,198

**BISHOP'S DIRECTED FUNDS  
(Restricted)**

D7001C : Percival L. & Julia A. Powell Fund (1986) Income to be paid to the bishop to relieve want or need for indigent persons known to them. The bishop is to be guided in their discretion, acting with the advice of the trustees.	\$397,910
D8000A: Monks / Stevens / Pittman (1913/1969/1971) Scholarship fund for young parishioners of any church in the diocese, at the discretion of the bishop in accordance with the financial needs of the scholarship candidates.	\$834,077

D8000C: Annie O. Baldwin Fund II (1952) Income to be paid to the bishop for the use of the chapel in the diocesan house.	\$18,251
D8000E: Paulina Cony Drown Fund (1960) To be used under the discretion of the bishop for global partnerships.	\$67,179
D8000F: Hill Fund (1962) Income to be used for assistance of Episcopal youth, in such manner as may from time to time be determined by the bishop.	\$349,146
D8000H: Laura R. Little Memorial Fund (1949) Income to be used at the discretion of the bishop for missionaries when at home on furlough, prior consideration being given to missionaries from the Diocese of Massachusetts.	\$66,404
D8000I : Edward F. McIntire Fund (1939) Income to be used at the bishop's discretion for the education of Episcopal clergy, especially those in need.	\$19,828
D8000M: Patience H. Sloane Fund (1940) Income to be used at discretion of the bishop for aid of elderly or infirm women within the diocese to help bring comfort and happiness.	\$263,625
D8000N: George Augustus Strong Memorial Fund (1914) Income to be used at the discretion of the bishop for the comfort and assistance of those engaged in Christian service.	\$42,410
D8000O: Amelia Worthington Fund I (1912) Income to be used at discretion of the bishop for the increase of the salaries of such missionaries and clergy in the diocese.	\$505,583
D8000Q: Sherbondy Fund (1976) Income to be used by the bishop for assisting poorer clergy of the diocese or for other purposes at the bishop's discretion.	\$5,088
D8000R: The Dill Fund (1976) Income to provide scholarship aid to young persons who reside in Cambridge and/or Belmont, and desire to attend Camp O-At-Ka Inc. in East Sebago, Maine.	\$97,788
D8000S: Anna Muirson Johnson Bellamy FD (1927) The principal is to be lent without interest to parishes or missions as the bishop may think wise.	\$39,621
D9000L: East Cambridge Fund – Ascension (Vote of Corporation) (1916) Income to be applied for the support of the Episcopal Church in Cambridge or in its vicinity.	\$100,752
D9000O: Fay Donation II (Vote of Corporation) (1885) Income to be used to aid in the support of clergy and missionaries of the diocese.	\$310,387
D9000P: William A. Gatchell Fund (Vote of Corporation) (1973) Income used for the benefit of disabled or underprivileged children.	\$985,284
D9000T: Swansea Rest House Fund (Vote of Corporation) (1910) For the rest and recreation of the clergy of the diocese and their families. The Trustees of Donations voted to establish a fund for the Continuing Education of Clergy in September 1971.	\$3,316,114
D9000W: C. Harrison Sowdon Fund (Vote of Corporation) (1911) Income only to be expended for the relief of clergy or their families, or of small parishes in need, or at their discretion for any of the purposes set forth by vote of the Trustees of Donations.	\$113,014

		<b>Market Value of Fund -</b>	
		<b><u>6/30/2023</u></b>	<b><u>4% Draw</u></b>
<b>UNRESTRICTED BDF ENDOWMENTS</b>			
D8000D	MARIA A APPLETON DODGE FUND	1,916,791	78,476
D8000J	THOMAS NELSON MEMORIAL FUND	26,589	1,089
D8000K	S & F ROWE FUND	26,704	1,093
D8000L	VALENTINE SLATERY FUND	23,956	981
D8000P	AMELIA WORTHINGTON FUND II	730,183	29,895
D9000M	SARAH H A BURNHAM FUND	2,011,438	82,351
D9000Q	ELIZA S HATFIELD FUND - VOC	1,489,864	60,997
D9000S	FRANCIS S PARKER FUND	818,254	33,501
D9000U	AGNES WINSLOW RILEY FUND	414,469	16,969
D9000V	SARAH L SLATTERY FUND	146,166	5,984
D9000X	FRANCES L WHITTEMORE FUND	171,976	7,041
D9000Y	ROBERT E TOWNSEND TRUST - VOC	101,198	4,143
<b>TOTAL</b>		<b><u>\$7,877,588</u></b>	<b><u>\$322,520</u></b>

		<b>Market Value of</b>	
		<b><u>Fund -</u></b>	
		<b><u>6/30/2023</u></b>	<b><u>-4% Draw</u></b>
<b>RESTRICTED BDF ENDOWMENTS</b>			
D7001C	PERCIVAL L & JULIA A POWELL	379,910	16,291
1D8000A	MONKS/STEVENS/PITTMAN	834,077	34,148
D8000C	ANNIE O BALDWIN FUND II	18,251	747
D8000E	PAULINE CONY DROWN FUND	67,179	2,750
D8000F	HILL FUND	349,146	14,295
D8000H	LAURA R LITTLE MEMORIAL FUND	66,404	2,719
D8000I	EDWARD F MCINTIRE FUND	19,828	812
D8000M	PATIENCE H SLOANE FUND	263,625	10,793
D8000N	GEORGE AUGUSTUS STRONG MEM FUND	42,410	1,736
D8000O	AMELIA WORTHINGTON FUND I	505,583	20,699
D8000Q	SHERBONDY FUND	5,088	208
D8000R	THE DILL FUND	97,788	4,004
D8000S	ANNA MUIRSON JOHNSON BELLAMY FD	39,621	1,533
D9000L	EAST CAMBRIDGE FUND - ASCENSION	100,752	4,125
D9000O	FAY DONATION II	310,387	12,708
D9000P	WILLIAM A GATCHELL FUND	985,284	40,339
D9000T	SWANSEA RESTHOUSE FUND	3,316,114	135,766
D9000W	C HARRISON SOWDON FUND - VOC	113,014	4,627
<b>TOTAL</b>		<b><u>\$7,532,461</u></b>	<b><u>\$308,300</u></b>

## OTHER FUNDS

### Stokes Loan Program

More than half of the Diocesan Advance Fund (1964) proceeds went to support parish buildings, through grants for new construction and to seed an ongoing loan program. The loan program continues to this day and is named in honor of the Rt. Rev. Anson P. Stokes III, who served as the 11th bishop from 1956 to 1970 (and during the DAF campaign).

### Reserve Accounts

In January 2015, Diocesan Council established three new reserve accounts for property maintenance, episcopal elections and capital equipment, and it transferred \$1,050,000 from the General Endowment Fund to support these reserves. The creation of these accounts reduces the need to draw upon the General Endowment Fund for capital needs. The Executive Committee of Diocesan Council responds to requests for funding from these accounts. As of June 30, 2023, the value of these reserves was \$1,555,719.

<b>Reserve Account</b>	<b>Balance - June 30, 2023</b>
Episcopal Elections	\$495,000
Staff Sabbaticals	\$50,777
Lambeth Conference	\$17,500
General Convention	\$54,783
Property Maintenance	\$937,659
<b>TOTAL</b>	<b>\$1,555,719</b>

### Stokes Gift

In July 1969, Mrs. Stokes donated Proctor & Gamble stock for the bishop to provide hospitality for clergy of the diocese and their families and for the entertainment of visitors. This value of these holdings totaled \$2,427,840 on June 30, 2023.

### Bishop Discretionary Funds

There are four endowments which are for the bishop's use at their discretion. These funds totaled \$6,186,851 on June 30, 2023, and the draw for 2024 will be \$253,299.

**APPENDIX B: Grants distributed in 2022 to  
Congregations, Community Partners, Clergy Dependents and Global Partners**

*Grants shown are those awarded within calendar year 2022 (see the 2022 Actual column in the Grants tables on page 41 for Support for the Wider Church and page 42 for Grants to Congregations, Clergy and Special Ministries). On occasion grant awards are withheld until the next year pending resolution of compliance issues.*

**African Ministries Grants**

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
Grace Chapel	Brockton	Brockton Boys' and Girls' Brigade Music Program	\$3,000
African Clergy Caucus	c/o St. Peter's, Cambridge	African Caucus Family Retreat	\$5,000
Grace Church	Everett	Grace Church, Dinka-speaking community	\$4,000
Christ Church/Iglesia San Juan	Hyde Park	Youth Evangelism	\$8,000
Christ the King Mission	Lynn	Congregation Development & Eneza Injili Music Ministry	\$8,750
Trinity Church	Randolph	Increased Multicultural Programs	\$2,500
St. Peter's	Waltham	Congregation/Worshipping Community (Inter- generational Praise and Worship Program)	\$8,750
<b>Total</b>			<b>\$40,000</b>

**Case Trust/Bristol County Fund**

*These grants are supported by the Eliza Gray Case Trust, DIT 7002T.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
All Saints'	Attleboro	Tent and Sound System	\$6,400
St. Peter's	Dartmouth	Youth and Spirit	\$7,800
Bristol Trinity	Easton	Food Pantry	\$18,600
Holy Spirit	Fall River	Community Breakfast and Laundry Love	\$18,000
St. Andrew's	New Bedford	Afterschool Program	\$25,102
Grace Church	North Attleboro	Grace Cares	\$8,500
Our Saviour	Somerset	Youth Empowerment	\$25,960
Christ Church	Swansea	Liturgical Experience	\$20,610
St. Thomas's	Taunton	Tweens & Teens Program and Our Daily Bread Food and Resource Center Programs	\$26,080
<b>Total</b>			<b>\$157,052</b>

**Clergy Children College Scholarships**

*These grants are supported by a Bishop's Directed Fund, the Swansea Resthouse Fund, DIT 9000T.*

Scholarships awarded to 10 students	<b>\$27,500</b>
-------------------------------------	-----------------

**Congregational Development Open Grants***These grants are supported by the Fund for Congregational Vitality, DIT 70041.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
All Saints'	Attleboro	ComPanions	\$3,000
CRECHE	Boston	CRECHE Antiracism Retreat	\$10,000
All Saints	Danvers	Comfort Cafe	\$10,000
St. Mary's	Dorchester	Heavenly Fire Reborn	\$6,500
St. Barnabas's	Falmouth	Permaculture for Creation Care	\$7,000
St. Mark's	Foxborough	Increasing the Visibility of Our Welcoming Community of Faith	\$7,000
St. Stephen's	Lynn	Virtual Services Outreach	\$9,500
Good Shepherd	Reading	Updated Technology for Intergenerational Hybrid Meetings	\$1,500
Our Saviour	Somerset	South Coast Collaboration (Christ Church, Swansea; Holy Spirit, Fall River; St. Luke's, Fall River)	\$10,000
Christ Church	Swansea	Community Awareness Ministry	\$10,000
Grace Church	Vineyard Haven	Improving Accessibility to Chapel and Classrooms	\$10,000
St. Peter's	Weston	Afghan Assistance Program	\$10,000
Church of the Messiah	Woods Hole	Love First Children's Ministry	\$5,500
<b>Total</b>			<b>\$100,000</b>

**Congregational Development Targeted Grants***These grants are supported by the Fund for Congregational Vitality, DIT 70041.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
UMass-Dartmouth Chaplaincy	Dartmouth	Strategic Planning at St. Peter's Episcopal Church	\$5,000
		Assistance for Rectory Expenses for Shared Priest-in-Charge of St. Stephen's (Westborough) and St. Paul's (Hopkinton)	\$4,000
St. Paul's	Hopkinton		
Grace Church	North Attleboro	Technology Support	\$4,000
Trinity Church	Rockland	Online Worship	\$200
<b>Total</b>			<b>\$13,200</b>

### Continuing Education Grants

*These grants are supported by various Bishop's Directed Funds.*

<b>Clergy person</b>	<b>Congregation</b>	<b>Program</b>	<b>Amount</b>
Kate Bast	Trinity Church, Melrose	Fundamentals of Transition Ministry	\$500
Daniel Bell	St. Mark's, Burlington	Creating a Culture of Renewal	\$500
John Brockmann	Grace Church, Norwood	Fundamentals of Transition Ministry	\$500
Jacqueline Clark	Trinity Church, Haverhill	Episcopal Latino Ministry Competency	\$500
Kapya Kaoma	Christ Church, Waltham	Creative Writing	\$500
Philip Labelle	St. Mark's, Southborough	Building a Second Brain	\$500
Christopher Morck	Grace Church, New Bedford	Interim Ministry Training	\$500
Jean Baptiste Ntagengwa	Diocesan Staff	Encounters in the Holy Land	\$500
Kelly O'Connell	Diocesan Staff	Touched by Grace	\$500
Gregory Perez	St. Stephen's, Lynn	Interim Ministry Training	\$500
Timothy Rogers	St. John's, Holbrook	Master's Degree in Marriage and Family Therapy	\$500
<b>Total</b>			<b>\$5,500</b>

### Hispanic Ministries Grants

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
St. Luke's-San Lucas	Chelsea	Spanish and Bilingual Music Program	\$5,000
St. Mary's	Dorchester	Platiquemos	\$3,200
Grace Church	Lawrence	Grace Church Music Program	\$5,000
St. Anne's	Lowell	Music for Latino Congregation	\$5,000
St. Stephen's	Lynn	Ministerio Hispano/Ministry to the Hispanic Community	\$5,000
St. Peter's-San Pedro	Salem	Hispanic Music Ministry	\$5,000
<b>Total</b>			<b>\$28,200</b>

**House of Mercy Grants (by deanery)**

*These grants are supported by the House of Mercy Fund, DIT 7002Y.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
<b><i>Alewife</i></b>			
St. Paul's	Bedford	Outreach Committee Haiti Mission Funding for Nutritional Supplements for Children's Nutrition Program of Haiti	\$750
St. James's	Cambridge	Helping Hand Pantry	\$250
Christ Church	Waltham	Diaper Depot	\$2,037
<b><i>Boston Harbor</i></b>			
Church of the Advent	Boston	Tuesday Community Supper	\$1,518.50
St. Stephen's	Boston	Parent Engagement Program	\$1,518.50
<b><i>Cape &amp; Islands</i></b>			
St. Mary's	Barnstable	Amazing Grace Camp	\$3,037
Church of the Holy Spirit	Orleans	Food4Kids	\$1,000
<b><i>Charles River</i></b>			
Grace Church	Newton	Newton/Brookline Resettlement Coalition	\$3,037
<b><i>Merrimack Valley</i></b>			
St. John's	Lowell	Kaleidoscope Center for the Arts	\$3,037
<b><i>Mt. Hope-Buzzards Bay</i></b>			
St. Andrew's	New Bedford	Finding Faith in the Arts	\$3,037
<b><i>Neponset River</i></b>			
Christ Church	Hyde Park	Widows Might	\$1,518
Church of the Advent	Medfield	New Life Furniture Bank of Massachusetts	\$1,518
<b><i>North Shore</i></b>			
St. Stephen's	Lynn	Women in Motion	\$1,518.50
St. Peter's-San Pedro	Salem	St. Peter's-San Pedro Mamas Unidas Diaper Ministry	\$1,518.50
<b><i>South Shore</i></b>			
Grace Chapel	Brockton	Pathway to Wholeness	\$3,000
<b><i>Taunton River</i></b>			
All Saints'	Attleboro	One Family, A Mission of Unity	\$1,518.50
Church of Our Saviour	Middleborough	Laundry Help	\$1,518.50
<b>Total</b>			<b>\$31,332</b>

**Mission Strategy Microgrants**

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
All Saints'	Attleboro	Upgrades to lighting and energy efficiency	\$900
Cathedral Church of St. Paul	Boston	"Waiting to Welcoming: Advent to Christmas" concert	\$880
ProGente Connections	Framingham	Ministry among Portuguese-speaking community	\$12,000
Grace Church	Salem	Antiracism Library	\$750
<b>Total</b>			<b>\$14,530</b>

### Mission Tithe Matching Grants

Mission Tithe Matching Grants are funded through funds remaining from the Together Now campaign, set aside as the Global Mission Discretionary Fund. This fund will be used to support grants for the next several years, allowing the Global Mission Grant Fund endowment to increase in value without taking an annual draw until necessary.

Organization	Pilgrimage/Mission Partner Location	Amount
St. John's Anglican Seminary	Zambia Shipment of books from EDS Library, to be shared with Bishop Gaul Seminary in Zimbabwe, St. Leonard Kamungu in Malawi and St. Augustine's in Botswana	\$12,262
<b>Total</b>		<b>\$12,262</b>

### Sabbatical Funds

These grants are supported by the Diocesan Advance Fund Bishop Nash Fund, DIT 7002M, and various Bishop's Directed Funds.

Church	Town	Clergyperson	Amount
St. John's	Jamaica Plain	Ted Cole	\$2,500
St. Peter's	Osterville	Beth Grundy	\$2,500
Christ Church	Swansea	Alan Hesse	\$2,500
Christ Church	Andover	Michael Hodges	\$2,500
St. Michael's	Milton	Hall Kirkham	\$2,500
St. Mark's	Southborough	Philip Labelle	\$2,500
St. Dunstan's	Dover	Sean Leonard	\$2,500
St. Paul's	North Andover	Sarah Mato	\$2,500
Grace Church	Salem	Deborah Phillips	\$2,500
<b>Total</b>			<b>\$22,500</b>

### Sending Serving Grants (by deanery)

Church	Town	Project	Amount
<b><i>Alwife</i></b>			
St. Paul's	Bedford	Assisting Afghan Immigrants Resettling in Lowell	\$750
St. James's	Cambridge	Helping Hand Food Pantry	\$3,250
<b><i>Boston Harbor</i></b>			
Cathedral Church of St. Paul	Boston	MANNA	\$2,354.66
Church of the Advent	Boston	Tuesday Night Community Supper	\$827.16
St. Stephen's	Boston	Teen Leadership Development	\$827.16
<b><i>Cape &amp; Islands</i></b>			
St. David's	South Yarmouth	TakeAway Meal Program	\$3,000
<b><i>Charles River</i></b>			
St. Paul's	Newton Highlands	GVCP Orphans.org	\$4,000
<b><i>Merrimack Valley</i></b>			
Trinity Church	Haverhill	Urban Bridges, Dinah's House	\$4,000
St. Andrew's	Marblehead	Liberating Ourselves from Racism	\$4,000
<b><i>Neponset River</i></b>			
St. Paul's	Dedham	Dedham Food Pantry	\$1,725
Christ Church	Hyde Park	International Evangelism	\$1,725
St. Michael's	Milton	Milton Residents Fund	\$550
<b><i>South Shore</i></b>			
Grace Chapel	Brockton	The Boys' and Girls' Brigade	\$1,000
<b><i>Taunton River</i></b>			
All Saints'	Attleboro	One Family, A Mission of Unity	\$4,000
<b>Total</b>			<b>\$32,008.98</b>

**Society for the Relief of Aged or Disabled Clergy**

*These grants are distributed by the society and are not reflected in the diocesan budget.*

Served 31 clergy

**\$142,188**

**Society for the Relief of Widows, Widowers and Orphans of Clergy**

*These grants are distributed by the society and are not reflected in the diocesan budget.*

Served 33 survivors

**\$101,500**

**Special Needs Ministries Grants**

*These grants are supported by the Deaf Ministry Endowment, DIT 7004H.*

**No grants made in 2022.**

**Sustainable Development Grants**

*These grants are supported by an allocation of 0.7% of unrestricted diocesan income in response to the UN Sustainable Development Goals for grants to partners in developing nations.*

**No grants made in 2022.**

## APPENDIX C: DIOCESAN STAFF

(as of Sept. 16, 2023)

The Rt. Rev. Alan M. Gates, Bishop Diocesan  
The Rt. Rev. Carol J. Gallagher, Assistant Bishop

David Ames, *Executive Assistant to the Assistant Bishop*  
Amal Armanyous, *Accounting Assistant*  
The Ven. Christiaan A. Beukman, *Archdeacon (non-stipendiary)*  
Kelsey Rice Bogdan, *Executive Director, Life Together*  
The Rev. Edward M. Cardoza, *Missioner for Property Stewardship*  
Jocelyn Collen, *Administrator for Congregations and Development*  
The Rev. Marilee Comerford, RN, *Assistant Missioner for Ministry with Older Adults (non-stipendiary)*  
The Rev. Canon Edie Dolnikowski, *Canon for Ordained Vocations*  
Nathaniel Fasman, *Human Resources Administrator*  
The Rev. Philip J. Flaherty, *Missioner for Ministry with Older Adults (non-stipendiary)*  
Martha S. Gardner, *Missioner for Networking and Formation*  
Jennifer Garrett, *Administrator for Networking and Events*  
Carolina Gomez, *Accountant*  
Tom Hamel, *Controller*  
The Rev. Megan Holding, *Chaplain, Northeastern University (part-time)*  
The Rev. Canon Martha L. Hubbard, *Regional Canon, Northern and Western Region*  
Matthew Jarrell, *Director of Operations*  
The Rev. Margaret Lias, *Administrator for Governance and Grants and Assistant to the Canon to the Ordinary*  
The Rev. Ryan Lun, *Pastor-in-Charge, Episcopal Boston Chinese Ministry (part-time)*  
The Rev. Canon Jean Baptiste Ntagengwa, *Canon for Immigration and Multicultural Ministries*  
The Rev. Canon Kelly A. O'Connell, *Regional Canon, Southern Region*  
The Rev. Canon William C. Parnell, *Canon to the Ordinary*  
The Rev. Canon Gregory G. Perez, *Regional Canon, Central Region (effective Oct. 1, 2023)*  
Jaime Perez, *Sexton for Remote Facilities (part-time)*  
Suzette Phillips, *Assistant for Clergy Records and Retired Clergy and Survivors (part-time)*  
Raquel Riberti-Bill, *Executive Director, ProGente Connections (part-time)*  
The Rev. Yolanda A. Rolle, *Missioner for Youth and Young Adult Ministries*  
Laura Simons, *Executive Assistant to the Bishop Diocesan*  
Lydia Strand, *Prayer and Wellness Partner, Life Together (part-time)*  
Tracy J. Sukraw, *Director of Communications*  
Debra Thomas, *Chief Financial Officer*  
The Rev. Kevin Vetiac, *Chaplain, Massachusetts Institute of Technology (part-time)*  
The Ven. Patricia Zifcak, *Archdeacon and Assistant for Ordained Vocations (non-stipendiary)*





Episcopal Diocese of Massachusetts  
138 Tremont Street, Boston MA 02111  
617-482-5800  
[www.diomass.org](http://www.diomass.org)