

Episcopal Diocese
of Massachusetts

.....
234TH ANNUAL
CONVENTION

THE WAY OF LOVE
Practices for Jesus-Centered Life

2020 BUDGET AS PROPOSED TO THE DIOCESAN CONVENTION

November 2, 2019 | Back Bay Events Center, Boston



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of Massachusetts

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2020 Budget

**As proposed to the
Diocesan Convention**

**November 2, 2019
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(Term ends in November of the year listed)

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Episcopal Diocese of Massachusetts

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Dear Friends in Christ,

This booklet presents the proposed budget for the Episcopal Diocese of Massachusetts for the calendar year 2020. The goal of the Budget Committee and the Treasurer's Office in preparing this booklet is to provide you with a clear picture of diocesan annual operations, mission initiatives and overall financial health.

As the budget continues to represent our living into the current mission strategy, the Budget Committee held four budget "conversations" to hear concerns from all those with particular interest in the diocesan budget and the process by which it is determined. What the committee heard was invaluable in helping us determine what we could do to make the budget and its processes more transparent, inclusive and reflective of the concerns of the entire diocese. For clarity about the process of creating a budget, a slide show presentation was prepared showing the sources of income and expenditures and the entities responsible for the decisions about each; some of the charts from that presentation are included in this booklet.

The budget conversations themselves were an opportunity for inclusion of ideas and concerns from around the diocese, and will be repeated in 2020. The measure that most enhanced inclusivity, however, is that of the Mission Initiatives Committee, which created a line in the 2019 budget for new initiatives, resulting in support in 2020 for four new programs. These monies were intended for initiatives coming from outlying deaneries, allowing us to start addressing the issue of more equitable geographic spending.

Now in its second year of work, the Mission Initiatives Committee of Diocesan Council (previously known as the Strategic Ministries Committee), in conversation with stakeholders, diocesan staff, members of Diocesan Council and other interested parties, established the principles that guide its work. Information was collected from chaplaincies, programs and congregations which are supported by diocesan funding. The committee visited with them and heard them speak about the work they are doing. Based upon those conversations, the committee made recommendations for funding levels. The allocations appearing in the budget are the result of a collaboration among the bishops, the diocesan staff, the Mission Initiatives Committee and the Diocesan Council.

The process of putting together a budget of this size and complexity is rewarding, humbling and inevitably imperfect. We want to thank in particular Canon to the Ordinary Bill Parnell, Chief Business Officer Gerry Sullivan, Assistant Secretary of Convention Chelsea Smith, the members of the Budget Committee and the Diocesan Council for their dedication and guidance in crafting this budget.

We continue to be encouraged by the wide variety of creative ministries that we are undertaking together as members of our diocese. We pray that each of us are thankful for the gifts God has entrusted to our stewardship.

Faithfully yours,

The Rev. Stephen Voysey
Treasurer

Virginia Rogers
Chair, Budget Committee

OUR MISSION

We, the people of the Episcopal Diocese of Massachusetts, are living members of the body of Jesus Christ. As Jesus gathered his disciples, took bread and blessed it, and then offered his body for us in order to bring reconciliation, forgiveness and healing, so may we offer ourselves in Christ's name.

Embracing brave change

Keep alert, stand firm in your faith, be courageous, be strong.

Let all that you do be done in love. (I Corinthians 16:13-14)

God is calling to us to look ahead and to embrace brave change. As fewer people turn to the church as a source of solace and strength, more than ever we yearn to know and be known by God and one another. In a world plagued by grievous conflict, injustice and poverty, God gives us the courage to be agents of reconciliation, justice and abundance. There will be difficult choices for us as followers of Jesus. It is only through ongoing, prayerful discernment together that we will find a path to a faithful future.

Reimagining our congregations

I am about to do a new thing; now it springs forth, do you not perceive it? (Isaiah 43:19)

With God's help, we can support our congregations as they reimagine the shape of discipleship in 21st-century Massachusetts. We believe in the power of Christian community to transform lives through God's grace, a promise that sustains us even as we adapt to meet the needs of a changing world. We will deepen our relationship with God and increase our capacity to speak of our faith. Rooted in a living tradition, we will joyfully and courageously invite all people to worship our Creator, to share the reconciling love of Christ and to participate in the work of the Holy Spirit.

Building our relationships

From Christ the whole body, joined and knit together by every ligament with which it is equipped...promotes the body's growth in building itself up in love. (Ephesians 4:16)

With God's help, we will address painful divisions within our diocese, that we might serve the world worthily as one body in Christ. Blessed by the manifold charisms of all of our diverse members and congregations, we will strengthen the bonding ligaments between individuals, congregations and diocesan bodies. Honoring the contributions of every generation and working across differences to build each other up in love, we will share our varied gifts with one another and our world.

Engaging our world

Just as you did it to one of the least of these...you did it to me. (Matthew 25:40)

With God's help, we will continue to engage our world, working alongside our neighbors to share Christ's love through word and action. We will act as agents of God's compassion to those in need. We will work to reconcile ourselves and all people to one another, and all of creation to God, seeking justice and committing ourselves to the stewardship of our planet.

*Glory to God whose power, working in us, can do infinitely more than we can ask or imagine:
Glory to God from generation to generation in the church, and in Christ Jesus
for ever and ever. (Ephesians 3:20-21)*

BUDGET OVERVIEW

The 2020 budget is shaped in response to the mission strategy adopted by Diocesan Convention in November 2016, as the treasurer and Diocesan Council have continued to respond to the challenge of “embracing brave change.” They have been supported in the development of the budget by Council’s Budget Committee and Mission Initiatives Committee, as well as by ongoing conversation with the bishops and diocesan staff.

The mission strategy calls for our diocese to develop “a clear structure and transparent process for regularly evaluating all programs and ministries that receive diocesan funding based on their contribution to the spiritual, relational and practical goals of our diocesan mission strategy.”

To that end, the Mission Initiatives Committee, charged by the Diocesan Council,

- engages in priority-setting conversations with the bishops and senior staff;
- sets benchmarks and expectations for success and sustainability;
- oversees a protocol for reporting and engaging an evaluative process;
- makes recommendations regarding multiyear funding strategies; and
- administers an application process for funding new mission initiatives.

Diocesan program expenses were reviewed with diocesan staff members to ascertain expenses anticipated in 2020. Each expense in the proposed 2020 budget was compared with expenses for the previous five years, resulting in altered funding levels for many line items. In addition, the diocesan Compensation and Benefits Committee is undertaking a thorough study of compensation for clergy and lay staff throughout the diocese, as well as an examination of compensation, relative to other large dioceses, for the bishops and canon to the ordinary.

In response to the mission strategy call to create opportunities for diocesan staff to be present in congregations and ministries around our diocese and to invest in ministries with communities of color and immigrant communities, the bishop diocesan undertook a reorganization of the diocesan staff as announced at the Diocesan Convention in 2017. During the course of 2018, after a significant consultation and search process, the new structure was implemented and was largely in place by the end of that year. Some staff positions were eliminated, whereas other continuing positions were redefined with new areas of responsibility. New positions created include three regional canons, a missionary for networking and formation and a canon for immigration and multicultural ministries.

The Budget Committee has met monthly to develop a draft 2020 budget and to consider further changes in the budget format for clarity and transparency. Four budget conversations held in early April in Concord, Wareham, Boston and Topsfield provided the Budget Committee an opportunity to solicit input from people around the diocese.

This year, for the first time in a number of years, the proposed 2020 budget summary on page 10 is presented as a unified budget rather than with separate operational and strategic (or core and supplemental) columns. The budget summary, showing 2020 versus 2019 budgeted numbers, provides income categories, including congregational assessments and contributions, investment and endowment draws, interest and dividends, and various other income sources. Expenses continue to be divided in seven categories and are presented under two general headings: Mission Strategy Disbursements and Mission Strategy Support.

Mission Strategy Disbursements generally represent funds transmitted from the diocesan accounts to other entities. These are grouped into four categories: Support for the Wider Church; Grants to Congregations; Resources for Clergy; and Mission Initiatives.

Expenses listed under Mission Strategy Support generally include compensation and benefits for diocesan staff and the budgets for diocesan program areas. These are grouped in three areas: Episcopate and Governance; Resources for Congregations; and Facilities and Administration.

INCOME

- Assessments (pages 12-20)
- Investments and Endowments (pages 21-23)
- Other Income Sources (page 24)

EXPENSES

- Overview (page 25)
- Mission Strategy Disbursements
 - Support for the Wider Church (pages 26-27)
 - Grants to Congregations (pages 28-30)
 - Resources for Clergy (pages 31-33)
 - Mission Initiatives (pages 34-40)
- Mission Strategy Support
 - Episcopate and Governance (pages 41-43)
 - Resources for Congregations (pages 44-45)
 - Facilities and Administration (pages 46-48)

An important addition to the 2020 budget is the inclusion of an expense line for funding depreciation of equipment and property, estimated at \$252,000 and listed in the “Facilities and Administration” section of the budget. Each year our auditors recommend that we take this depreciation into account and the Budget Committee has recommended that the full estimate be included. While this is a challenge in terms of a balanced budget, it is a better alignment of budgeted and audited finances and complies with best practices for not-for-profit organizations.

Also included in the 2020 budget are new expense lines for support of networks, young adult initiatives, continuing education for diocesan personnel and a reserve for the decennial Lambeth Conference. Included on the income side is a \$20,000 draw from available funds in a restricted but underutilized endowment, well within a multiyear calculation of the 4% draw.

BUDGET RESOLUTION

MOVED, that the 234th Annual Convention of the Episcopal Diocese of Massachusetts approve the budget of revenue and expenses for 2020 as summarized on page 10, including the individual parish and mission assessments and approved adjustments for 2020 listed on pages 15-20.

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.

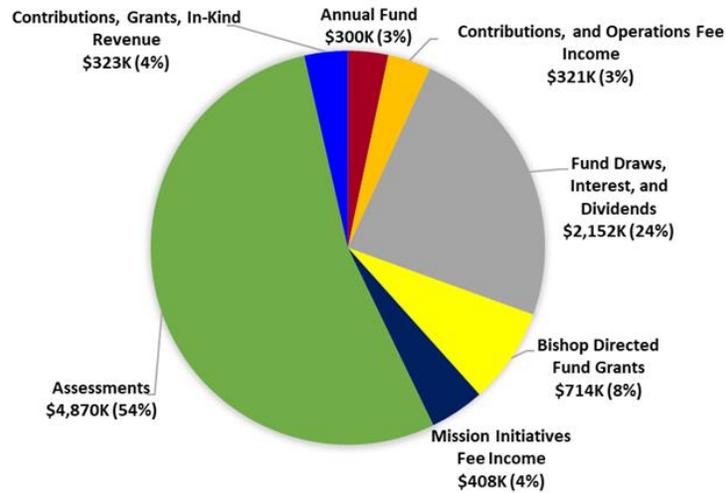
(c) The proposed budget shall be printed and sent, not less than four weeks prior to the annual session of Convention, to each member of the clergy, each congregation's treasurer, and to each delegate to the Convention. The Convention, without further reference to committee, shall consider and shall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

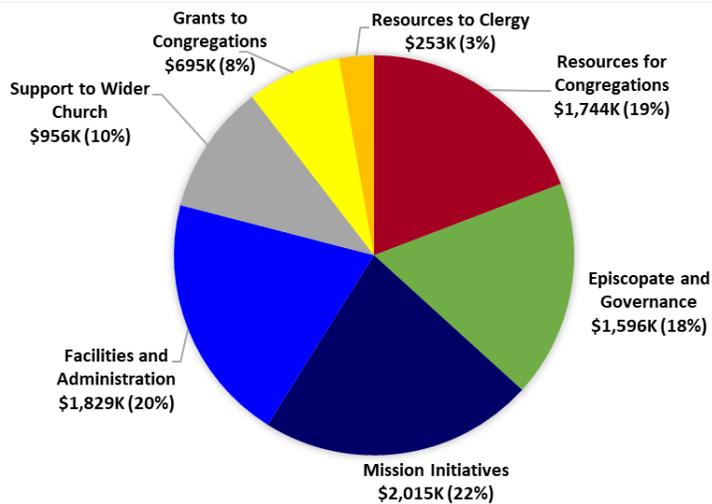
**Episcopal Diocese of Massachusetts
Budget Summary 2020 and 2019**

<u>INCOME</u>	<u>2020 Budget</u>	<u>% of Total</u>	<u>2019 Budget</u>	<u>\$\$ Change</u>
Assessments before adjustments	4,882,060	53.7%	4,838,124	43,936
Payments in lieu of Assessments	45,000	0.5%		
Less Adjustments	(57,078)	-0.6%	(86,645)	29,567
Total From Assessments	4,869,982	53.6%	4,751,479	118,503
<u>Investments and Endowments</u>				
Agency Fund draw (4% draw rate) Restricted	371,170	4.1%	360,922	10,248
Agency Fund Draw (4 % draw Rate) Unrestricted	763,905	8.4%	732,780	31,125
Trust Fund draw (4% draw rate) Restricted	914,747	10.1%	885,664	29,083
Restricted Funds Roll Forward	20,000	0.2%		20,000
Interest income	8,000	0.1%	8,000	-
Dividend income	74,000	0.8%	74,000	-
Bishop Directed Funds	714,210	7.9%	695,921	18,289
Total Investments and Endowments	2,866,032	31.5%	2,757,287	108,745
<u>Other Income</u>				
Property Rental	16,580	0.2%	45,000	(28,420)
Unrestricted Contributions and Misc. Income	304,575	3.4%	311,975	(7,400)
Annual Fund	300,000	3.3%	300,000	-
Restricted Contributions to Mission Initiatives	133,771	1.5%	97,500	36,271
Grants	107,000	1.2%	107,000	-
In-Kind Revenue	82,000	0.9%	40,000	42,000
Fee Income from Mission Initiatives	407,855	4.5%	368,200	39,655
Total From Other Sources	1,351,781	14.9%	1,269,675	82,106
				-
Total Income	9,087,795	100.0%	8,778,441	309,354
<u>EXPENSES</u>				
<u>Mission Strategy Disbursements</u>		43.1%		
Support For The Wider Church	956,514		952,455	4,059
Grants to Congregations	695,489		643,019	52,470
Resources for Clergy	253,312		293,127	(39,815)
Mission Initiatives-Gross Expenses	2,014,499		1,957,135	57,364
<u>Mission Strategy Implementation</u>		56.9%		
Episcopate and Governance	1,595,783		1,688,792	(93,009)
Resources for Congregations	1,743,630		1,712,859	30,771
Facilities and Administration	1,828,568		1,531,054	297,514
Total Expenses	9,087,795		8,778,441	309,354
Net surplus (deficit)	-		-	

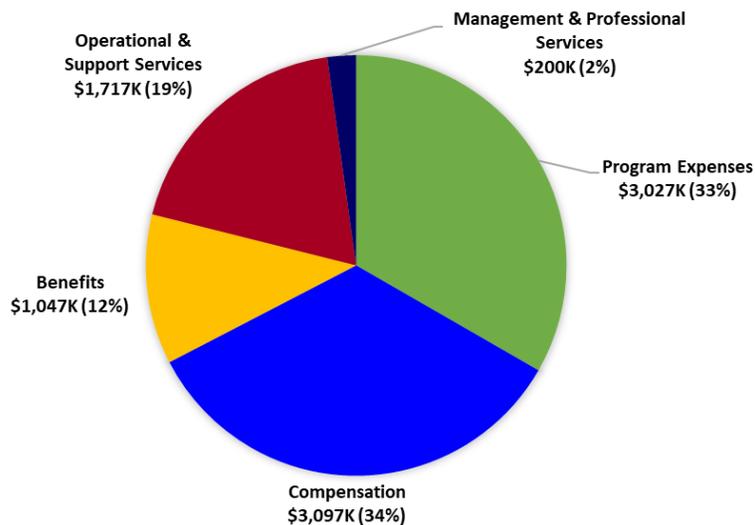
2020 Budget – Income



2020 Budget – Expenses by Mission Strategy Category



2020 Budget – Expenses by Cost Category



THE ASSESSMENT FORMULA: OUR COMMON SHARE

In 2017, the Diocesan Convention approved a tiered assessment formula, described below, which resulted in a 10% aggregate decrease in the assessment revenue from projections using the prior formula. Two principles guide the new formula. The first is the belief that every congregation should participate in financial support for diocesan mission, which is why even the smallest congregations pay an assessment. The second guiding principle is seen in the decision to adopt a tiered formula rather than a single rate: *“From everyone to whom much has been given, much will be required...” (Luke 12:48)*

Diocesan Council voted to continue this assessment formula in 2020. A change to the diocesan canons adopted at the Diocesan Convention in 2018 mandates that the Diocesan Council and the bishop diocesan review and, if called for, amend the diocesan mission strategy at least every five years and submit it to the convention for approval. This revised canon mandates that such a review of the current mission strategy, adopted at the convention in 2016, occur not later than 2021. It is appropriate that a review of the assessment formula be conducted as part of the mission strategy review. The annual diocesan budget is, by canon, a financial expression of the mission strategy. Congregational assessments account for 53.6% of annual income in 2020. Any mission strategy should, therefore, include a review of the assessment formula so the mission strategy is adequately funded.

Diocesan Council approved the following assessment formula:

Where BASE for 2020, according to the tiered system below, is equal to line 14 (“all other operating expenses”) from the 2017 parochial report, less line 7 (“assistance from diocese”), the following rates shall be applied (for a mission, the 2020 assessment is two-thirds the parish amount):

Step 1: \$00 to	\$50,000	00.15%
Step 2: \$50,001 to	\$500,000	14.50%
Step 3: \$500,001 to	\$99,000,000	15.50%

This assessment formula generates a gross assessment for 2020 of \$4,882,060. Included in the category of income from assessments are contributions in lieu of assessments from the Cathedral Church of St. Paul and Christ Church (Old North), totaling \$45,000. These are worshipping communities not in union with the Diocesan Convention and therefore not subject to assessment. Assessments for new mission congregations in union with the convention will begin in the third year after their first parochial report, e.g. 2022 for an initial parochial report filed in 2019.

Adjustments to Assessments

The Diocesan Council's Assessment Coordinating Committee recommends to Diocesan Convention adjustments to assessments based on one or more of the following reasons:

- Changes in circumstances of the congregation from the base year;
- Errors in the reporting of the congregation's Parochial Report for the base year;
- Miscalculations in assessments as reported by the diocesan Treasurer's Office.

Council's charge to this committee is to work with the congregations to determine equitable accommodations to their circumstances.

This year the committee received 16 applications from congregations. Eleven requested adjustments based on changed circumstances. Five requested adjustments due to revised Parochial Reports. We note that this year there is a larger number than usual of Parochial Report corrections from transcription errors or misunderstandings which affect the adjustment total. In addition, there were four congregations for which there were errors in calculating the 2020 assessments.

The committee recommends that Diocesan Convention approve the following adjustments based on changed circumstances. Where appropriate, the committee will request that a congregational consultant work with the congregation to assist with financial planning.

Church	Town	2020 Formula Assessment	Adjusted assessment	Adjustment
All Saints of the North Shore	Danvers	\$24,137	\$22,000	\$2,137
St. John's	Holbrook	\$5,708	\$2,854	\$2,854
St. Paul's	Hopkinton	\$8,733	\$4,367	\$4,366
St. Stephen's	Lynn	\$43,319	\$39,694	\$3,625
Trinity	Melrose	\$27,928	\$23,000	\$4,928
St. Paul's	North Andover	\$23,869	\$17,869	\$6,000
St. Anne's	North Billerica	\$23,806	\$11,906	\$11,900
St. John St. James	Roxbury	\$4,686	\$500	\$4,186
St. John's	Saugus	\$14,360	\$9,214	\$5,146
Good Shepherd	Wareham	\$20,704	\$16,704	\$4,000
St. Peter's	Salem	\$13,932	\$6,966	\$6,966
Application Totals		\$211,182	\$155,074	\$56,108

The committee received notice from four congregations of corrections to their 2017 Parochial Reports, resulting in revised figures based on reporting errors. These revised amounts have been incorporated into the assessment charts on pages 15-20.

Church	2017 Original	2017 Revised	Difference
St. Mark's, Burlington	\$9,666	\$7,829	\$1,837
Grace, Everett	\$12,136	\$4,670	\$7,466
St. Andrew's, Framingham	\$45,729	\$31,229	\$14,500
St. Martin's, New Bedford	\$7,272	\$6,451	\$821
Preliminary Total	\$74,803	\$50,179	\$24,624

In addition, Trinity Church in Randolph has signaled that there may be changes to its 2017 Parochial Report. Once its corrected figures are received, its 2020 assessment of \$10,513 will be recalculated.

Four congregations received statements in May 2019 in which there were errors in calculating the 2020 assessment. Two of the reported assessments were higher than the correct figure and two were lower. The committee recommends that the lower number be used in all four cases. For Christ Church in Hyde Park and St. Barnabas's Church in Falmouth, the recalculation has been incorporated into the assessment charts on pages 15-20. For Grace Church in New Bedford and the Church of the Holy Spirit in Orleans, the committee recommends that their assessments be adjusted to the amount published on May 1, 2019, a net change of \$970.

Church	Assessment as reported on 5/1/19	Correct assessment	Recommended adjustment
Christ Church, Hyde Park	\$2,658	\$2,632	\$0
St. Barnabas's, Falmouth	\$68,930	\$67,187	\$0
Grace, New Bedford	\$53,852	\$54,592	\$740
Holy Spirit, Orleans	\$61,766	\$61,996	\$230

With recommended adjustments of \$57,078, the net income from assessments and payments in lieu of assessments is \$4,869,982. This accounts for 53.6% of budgeted income.

2020 Assessment By Deanery

CODE diocesan church code

*** If a mission (2/3rds assessment)

BASE line 14 less line 7 from the 2017 Parochial Report

ASSESSMENT FORMULA FOR 2020 -Base Amount multiplied by:

Step One: \$ 0 to \$50,000 0.15%

Step Two: \$ 50,001 to \$500,000 14.50%

Step Three \$500,001 to \$99,000,000 15.50%

Code	Church	Location	Base	2020		Effective Rate	Prior Year Assessment
				Formula Assessment	Assessment (for Vote)		
Alewife							
2010	Church of Our Saviour	Arlington	142,142	13,436	13,436	9.5%	12,714
2015	St. John's Church	Arlington	124,861	10,930	10,930	8.8%	10,842
2025	St. Paul's Church	Bedford	229,081	26,042	26,042	11.4%	23,975
2030	All Saints' Church	Belmont	246,534	28,572	28,572	11.6%	27,712
2045	St. Mark's Church*	Burlington	116,145	7,829	7,829	6.7%	7,422
2050	Christ Church	Cambridge	908,467	128,637	128,637	14.2%	119,089
2055	St. Bartholomew's Church	Cambridge	209,556	23,211	23,211	11.1%	19,065
2060	St. James's Church	Cambridge	320,959	39,364	39,364	12.3%	43,299
2065	St. Peter's Church	Cambridge	262,892	30,944	30,944	11.8%	30,464
2085	Church of Our Redeemer	Lexington	374,778	47,168	47,168	12.6%	45,558
2135	St. James's Church	Somerville	72,376	3,320	3,320	4.6%	4,414
2145	Christ Church	Waltham	78,493	4,206	4,206	5.4%	11,783
2150	Church of the Good Shepherd	Watertown	170,873	17,602	17,602	10.3%	14,539
	Totals		3,257,157	381,260	381,260		370,876
Boston Harbor							
4035	St. Augustine's & St. Martin's Ch.	Boston (Roxbury)	123,028	10,664	10,664	8.7%	11,226
4010	Church of the Advent	Boston	1,192,091	172,599	172,599	14.5%	170,652
4025	Emmanuel Church	Boston	357,930	44,725	44,725	12.5%	41,746
4070	St. Stephen's Church***	Boston	68,987	1,885	1,885	2.7%	1,721
4075	Trinity Church	Boston	2,682,227	403,570	403,570	15.0%	442,031
1030	St. John's Church	Boston (Charlestown)	222,318	25,061	25,061	11.3%	20,789
4055	St. Mark's Church	Boston (Dorchester)	62,864	1,940	1,940	3.1%	10,638
4060	St. Mary's Church	Boston (Dorchester)	139,200	13,009	13,009	9.3%	8,021
3020	St. John's Church	Boston (Jamaica Plain)	202,413	22,175	22,175	11.0%	21,857
4040	St. Cyprian's Church	Boston (Roxbury)	219,025	24,584	24,584	11.2%	22,008
4050	St. John's St. James's Church	Boston (Roxbury)	81,797	4,686	4,686	0.6%	6,491
	Totals		5,351,880	724,898	720,712		757,180

Code	Church	Location	Base	Formula Assessment	Adjustments	2020 Assessment (for Vote)	Effective Rate	Prior Year Assessment
Cape and Islands								
6005	St. Mary's Church	Barnstable	623,179	84,418		84,418	13.5%	92,050
6010	St. Peter's Church	Buzzard's Bay	138,599	12,922		12,922	9.3%	11,732
6015	St. Christopher's Church	Chatham	646,729	88,068		88,068	13.6%	82,371
6020	St. Andrew's Church	Edgartown	298,026	36,039		36,039	12.1%	37,777
6030	St. Barnabas's Church**	Falmouth	512,016	67,187		67,187	13.1%	63,828
6040	Christ Church	Harwich Port	273,458	32,476		32,476	11.9%	33,005
6045	St. Paul's Church	Nantucket	399,924	50,814		50,814	12.7%	50,199
6050	Trinity Church	Oak Bluffs	20,485	31		31	0.2%	26
6055	Church of the Holy Spirit**	Orleans	477,038	61,996	230	61,766	12.9%	68,531
6060	St. Peter's Church	Osterville (Barnstable)	273,239	32,445		32,445	11.9%	30,957
6065	Christ Church	Plymouth	324,727	39,910		39,910	12.3%	35,296
6070	St. Mary's Church	Provincetown	179,615	18,869		18,869	10.5%	18,162
6075	St. John's Church	Sandwich	213,389	23,766		23,766	11.1%	18,701
6095	St. David's Church	South Yarmouth	299,728	36,286		36,286	12.1%	32,689
6080	Grace Church	Vineyard Haven	246,306	28,539		28,539	11.6%	28,907
6085	Church of The Good Shepherd	Wareham	192,269	20,704	4,000	16,704	8.7%	21,199
6090	Chapel of St. James's	Wellfleet	34,008	51		51	0.2%	48
6025	Church of the Messiah	Falmouth (Woods Hole)	289,709	34,833		34,833	12.0%	28,698
	Totals		5,442,444	669,354	4,230	665,124		654,174
Concord River								
2005	Church of the Good Shepherd	Acton	305,975	37,191		37,191	12.2%	37,865
2020	St. Andrew's Church	Ayer	162,140	16,335		16,335	10.1%	15,375
2075	Trinity Church	Concord	675,440	92,518		92,518	13.7%	95,183
3065	St. Andrew's Church*	Frammingham	364,857	31,229		31,229	8.6%	34,030
3075	St. Michael's Church	Holliston	173,443	17,974		17,974	10.4%	17,882
3080	St. Paul's Church	Hopkinton	109,712	8,733		8,733	4.0%	3,892
2080	St. Luke's Church	Hudson	79,793	4,395	4,366	4,367	5.5%	3,280
2090	St. Anne's Church	Lincoln	557,353	74,215		74,215	13.3%	74,308
3100	St. Paul's Church	Natick	422,504	54,088		54,088	12.8%	51,461
2125	Trinity Chapel	Shirley	63,303	2,004		2,004	3.2%	2,527
3155	St. Mark's Church	Southborough	255,737	29,907		29,907	11.7%	29,834
2140	St. Elizabeth's Church	Sudbury	451,066	58,230		58,230	12.9%	57,479
2165	St. Peter's Church	Weston	357,389	44,646		44,646	12.5%	48,409
	Totals		3,978,712	471,466	4,366	467,100		471,525

Code	Church	Location	Base	Formula		Adjustments	2020 Assessment (for Vote)	Effective Rate	Prior Year Assessment
				Assessment	Assessment				
Charles River									
3030	All Saints' Church	Brookline	430,916	55,308			55,308	12.8%	46,982
3035	Church of Our Saviour	Brookline	259,898	30,510			30,510	11.7%	31,297
3045	St. Paul's Church	Brookline	431,325	55,367			55,367	12.8%	52,049
3060	St. Dunstan's Church	Dover	263,838	31,082			31,082	11.8%	32,973
3105	Christ Church	Needham	455,771	58,912			58,912	12.9%	57,167
3110	Grace Church	Newton	352,001	43,865			43,865	12.5%	42,558
3125	Church of Our Redeemer	Newton (Chestnut Hill)	861,112	121,297			121,297	14.1%	125,106
3130	St. John's Church	Newton (Newtonville)	134,015	12,257			12,257	9.1%	11,754
3115	Church of the Good Shepherd	Newton (Waban)	345,139	42,870			42,870	12.4%	45,170
3145	Trinity Church	Newton Centre	292,164	35,189			35,189	12.0%	56,058
3135	St. Paul's Church	Newton Highlands	186,952	19,933			19,933	10.7%	18,654
3140	St. Mary's Church	Newton Lower Falls	427,980	54,882			54,882	12.8%	53,525
3165	St. Andrew's Church	Wellesley	1,032,387	147,845			147,845	14.3%	142,569
	Totals		5,473,498	709,317			709,317		715,861
Mt Hope - Buzzards Bay									
5020	St. Peter's Church	Dartmouth	50,695	176			176	0.3%	416
5035	Church of the Holy Spirit	Fall River	166,425	16,957			16,957	10.2%	15,914
5045	St. Luke's Church	Fall River	31,238	47			47	0.2%	38
5070	St. Gabriel's Church	Marion	406,068	51,705			51,705	12.7%	46,796
5080	Grace Church**	New Bedford	425,980	54,592	740		53,852	12.6%	80,810
5085	St. Andrew's Church	New Bedford	80,479	4,494			4,494	5.6%	6,203
5090	St. Martin's Church*	New Bedford	99,633	6,451			6,451	6.5%	5,622
5110	Church of Our Saviour	Somerset	125,229	10,983			10,983	8.8%	10,310
5115	Christ Church	Swansea	179,743	18,888			18,888	10.5%	18,150
	Totals		1,565,490	164,292	740		163,552		184,258
Merrimack Valley									
1005	St. James's Church	Amesbury	144,631	13,796			13,796	9.5%	13,447
1010	Christ Church	Andover	479,919	62,413			62,413	13.0%	65,087
2070	All Saints' Church	Chelmsford	299,078	36,191			36,191	12.1%	34,363
1055	St. James's Church	Groveland (South)	136,095	12,559			12,559	9.2%	11,958
1065	Trinity Church	Haverhill	165,561	16,831			16,831	10.2%	19,291
1075	Grace Church	Lawrence	183,973	19,501			19,501	10.6%	18,843
2095	St. Anne's Church	Lowell	198,176	21,561			21,561	10.9%	27,678
2100	St. John's Church	Lowell	76,041	3,851			3,851	5.1%	3,000
1125	St. Andrew's Church	Methuen	83,765	4,971			4,971	5.9%	3,885
1130	St. Paul's Church	Newburyport	316,200	38,674			38,674	12.2%	34,043
1135	St. Paul's Church	North Andover	214,097	23,869	6,000		17,869	8.3%	22,193
2040	St. Anne's Church	North Billerica	213,662	23,806	11,900		11,906	5.6%	20,415
1195	All Saints' Church***	West Newbury	73,665	2,338			2,338	3.2%	550
2160	St. Mark's Church	Westford	130,259	11,713			11,713	9.0%	11,934
	Totals		2,715,122	292,074	17,900		274,174		286,687

Code	Church	Location	Base	Formula		Adjustments	2020 Assessment (for Vote)	Effective Rate	Prior Year Assessment
				Assessment	Assessment				
Mystic Valley									
1025	Grace Church Federated***	Boston (East)	18,000	27			27	0.2%	0
1035	St. Luke's/San Lucas Church***	Chelsea	101,932	5,070			5,070	5.0%	5,093
1045	Grace Church*	Everett	133,176	4,670			4,670	3.5%	5,381
1095	St. Paul's Church	Lynnfield	240,827	27,745			27,745	11.5%	23,127
1105	St. Paul's Church	Malden	86,032	5,300			5,300	6.2%	10,049
2115	Grace Church	Medford	357,784	44,704			44,704	12.5%	43,328
1120	Trinity Church	Melrose	242,092	27,928	4,928		23,000	9.5%	23,961
1145	Church of the Good Shepherd	Reading	209,929	23,265			23,265	11.1%	11,912
1170	St. John's Church	Saugus	148,514	14,360	5,146		9,214	6.2%	19,797
1190	Emmanuel Church	Wakefield	174,436	18,118			18,118	10.4%	19,032
2170	St. Elizabeth's Church	Wilmington	41,850	63			63	0.2%	58
2175	Parish of the Epiphany	Winchester	743,873	103,125			103,125	13.9%	98,285
1200	St. John's Church	Winthrop	149,550	14,510			14,510	9.7%	14,874
2180	Trinity Parish	Woburn	57,025	1,094			1,094	1.9%	3,139
	Totals		2,705,020	289,978	10,074		279,904		278,036
Neponset River									
3005	Christ Church**	Boston (Hyde Park)	67,633	2,632			2,632	3.9%	66
3015	Iglesia de San Juan***	Boston (Hyde Park)	0	-			0	0.0%	0
4030	Church of the Holy Spirit	Boston (Mattapan)	284,958	34,144			34,144	12.0%	29,331
3010	Emmanuel Church	Boston (W. Roxbury)	68,939	2,821			2,821	4.1%	1,961
4085	Trinity Church	Canton	101,917	7,603			7,603	7.5%	13,366
3050	Church of the Good Shepherd	Dedham	89,948	5,867			5,867	6.5%	6,142
3055	St. Paul's Church	Dedham	351,127	43,738			43,738	12.5%	44,658
4015	All Saints' Church	Boston (Ashmont)	405,156	51,573			51,573	12.7%	47,073
3085	Church of the Advent	Medfield	203,530	22,337			22,337	11.0%	20,866
3090	Christ Church	Medway	63,551	2,040			2,040	3.2%	2,407
4130	St. Michael's Church	Milton	447,696	57,741			57,741	12.9%	58,436
3150	Grace Church	Norwood	122,433	10,578			10,578	8.6%	9,760
5105	St. John's Church	Sharon	45,526	68			68	0.2%	65
4160	Trinity Church	Stoughton	92,947	6,302			6,302	6.8%	4,404
3160	Epiphany Church	Walpole	137,199	12,719			12,719	9.3%	10,558
3170	St. John's Church	Westwood	166,484	16,965			16,965	10.2%	14,590
	Totals		2,649,044	277,129	0		277,129		263,683

Code	Church	Location	Base	2020		Effective Rate	Prior Year Assessment
				Formula Assessment	Assessment (for Vote)		
North Shore							
1021	St. Peter's Church	Beverly	294,220	35,487	35,487	12.1%	30,713
1015	St. John's Church	Beverly Farms	599,775	80,790	80,790	13.5%	80,391
1143	All Saints Episc. Church of N. S.	Danvers	215,944	24,137	2,137	10.2%	24,412
1050	St. John's Church	Gloucester	231,909	26,452	26,452	11.4%	22,781
1070	Ascension Memorial Church	Ipswich	248,105	28,800	28,800	11.6%	27,060
1090	St. Stephen's Church	Lynn	348,237	43,319	3,625	11.4%	34,371
1110	St. Andrew's Church	Marblehead	370,243	46,510	46,510	12.6%	48,634
1116	St. Michael's Church	Marblehead	309,687	37,730	37,730	12.2%	38,489
1155	St. Mary's Church	Rockport	160,474	16,094	16,094	10.0%	15,900
1160	Grace Church	Salem	126,454	11,161	11,161	8.8%	9,556
1165	St. Peter's Church	Salem	145,568	13,932	6,966	4.8%	17,467
1060	Christ Church	South Hamilton & Wenham	478,090	62,148	62,148	13.0%	59,196
1180	Church of the Holy Name	Swampscott	143,555	13,640	13,640	9.5%	12,646
1185	Trinity Church	Topsfield	225,323	25,497	25,497	11.3%	27,115
	Totals		3,897,584	465,697	12,728		448,730
South Shore							
4080	Emmanuel Church	Braintree	108,774	8,597	8,597	7.9%	10,322
4090	St. Stephen's Church	Cohasset	346,283	43,036	43,036	12.4%	41,960
4095	Church of St. John the Evangelist	Duxbury	329,137	40,550	40,550	12.3%	40,033
4100	St. Andrew's Church	Hanover	122,813	10,633	10,633	8.7%	9,372
4105	St. John's Church	Hingham	626,204	84,887	84,887	13.6%	76,977
4110	St. John's Church	Holbrook	88,845	5,708	2,854	3.2%	5,016
4120	Trinity Church	Marshfield Hills	132,627	12,056	12,056	9.1%	11,374
4125	Church of Our Saviour	Milton	146,540	14,073	14,073	9.6%	13,736
4135	Christ Church	Quincy	162,654	16,410	16,410	10.1%	15,468
4140	St. Chrysostom	Quincy (Wollaston)	193,257	20,847	20,847	10.8%	18,602
4145	Trinity Church	Randolph	121,986	10,513	10,513	8.6%	5,339
4150	Trinity Church	Rockland	79,877	4,407	4,407	5.5%	3,589
4155	St. Luke's Church	Scituate	208,049	22,992	22,992	11.1%	23,468
4165	Church of the Holy Nativity	South Weymouth	141,366	13,323	13,323	9.4%	12,672
5130	All Saints' Church	Whitman	76,886	3,973	3,973	5.2%	4,609
	Totals		2,885,298	312,005	2,854		292,537
							309,151

Code	Church	Location	Base	2020		Effective Rate	Prior Year Assessment
				Formula Assessment	Assessment (for Vote)		
Taunton River							
5005	All Saints' Church	Attleboro	82,275	4,755	4,755	5.8%	4,719
5010	Trinity Church	Bridgewater	106,052	8,203	8,203	7.7%	6,703
5060	St. Mark's Church	Foxboro	161,544	16,249	16,249	10.1%	12,662
3070	St. John's Church	Franklin	123,601	10,747	10,747	8.7%	11,787
5075	Church of Our Saviour	Middleborough	130,855	11,799	11,799	9.0%	12,244
5095	Grace Church	North Attleboro	175,326	18,247	18,247	10.4%	17,120
5135	Bristol Trinity Episcopal Church	North Easton	88,917	5,718	5,718	6.4%	5,571
5125	St. Thomas's Church	Taunton	277,058	32,998	32,998	11.9%	29,599
3175	Trinity Church	Wrentham	158,954	15,873	15,873	10.0%	14,620
	Totals		1,304,582	124,589	0		115,025
			41,225,831	4,882,060	57,078		4,838,573

* Congregation submitted a corrected 2017 Parochial Report. Assessment reflects calculation based on corrected report, not the number reported in May

** An error was made in the assessment figure reported in May. Where the correct assessment number is lower, it is reported in the formula assessment column. Where the correct assessment figure is higher, it is reported in the Formula Assessment column along with a recommended adjustment in the Adjustments column to the lower figure reported in May.

*** Mission parishes are assessed at 2/3 the calculation of parishes.

INCOME FROM INVESTMENTS AND ENDOWMENTS

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 at the direction of the Trustees of Donations; and Trust Investment Funds known as Bishop's Directed Funds.

Approximately 31.5% of total income is in the form of draws from investments. All endowment draws are subject to the 4% multiyear draw policy. Some funds, whether owned by the diocese or by a trust, are unrestricted and not subject to restriction or designation regarding the use of the income provided through appropriate draws. These unrestricted funds represent about 27% of the income available in line with our spending policy. The remaining funds have some restriction on the use of the income, but in most 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 2020, the Budget Committee has included a draw of \$20,000 from a restricted endowment fund with such an available surplus.

Agency Endowment Funds

Appendix A, pages 49-53, provides a summary of the history and use of Agency Endowments in addition to a chart of market values.

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. 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). 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, 2019, the reported value of Agency Investments was \$29,706,669.

The proposed spending policy for 2020 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, 2019.

The total spending policy income available to the 2020 budget is \$1,135,075, which is \$41,373 more than in 2019. The increase reflects net additions to the endowment over the past 12 quarters as well as market appreciation.

At the same time, Diocesan Council has unrestricted access to several funds in the endowment; both principal and income can be spent as long as 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 with 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 2020 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. Only in a few cases (designated with “R” next to the cost center and description) are there specific cost centers or programs designed to fulfill specific fund restrictions.

Trust Endowment Funds

Appendix B, page 54, provides a chart of market values.

Trust Endowment Funds are funds owned by trusts that are legal entities distinct from the diocese. The Trustees of Donations (TOD) manages the trusts according to conditions in the legal documents that created the trusts and identify the beneficiaries. The various legal trustees of these trusts control the investment of these funds.

In 2020 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 2016 through June 2019. As of June 30, 2019, the reported value of trust investments was \$24,272,229.

There are a few funds with restrictions that require the TOD to deviate from the general spending policy formula. In some cases, the distribution is limited to dividend income produced by the fund, or, in other cases, all income must be reinvested for a specific period of time. The table of projected trust income for these funds is an estimate of the income that will be available in 2020.

The total spending policy income available in 2020 (\$914,747) is a small increase from 2019 (\$885,664), 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 dividend 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 parishes and other Episcopal organizations for their own agency funds. There are more than 147 DIT participants.

Thirty-one trustees serve on the TOD. At present, three trustees are diocesan officers, five were elected by Diocesan Convention, five were appointed by the bishop and 15 were elected by the trustees themselves. There are three vacant positions. Additional information about the TOD is found at www.trusteesofdonations.org.

Interest and Dividends

The estimate for 2020 dividend income is \$74,000. Of this, most all is from a gift of stock received more than 40 years ago, with the request that it not be sold. The other sources of income recorded here are three charitable remainder trusts not held by the Trustees of Donations and dividend income on diocesan money market and bond mutual funds.

Interest income, estimated at \$8,000, 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

Appendix C, page 55, provides a chart of market values.

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 (BDF's).

Of the many funds owned by the Trustees of Donations, 34 funds with a market value of approximately \$20,009,021 (as of June 30, 2019) 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 2020 budget includes \$714,210 of income from Bishop's Directed Funds.

In addition, grants totaling approximately \$8,500, not included in the annual budget, are made directly by the Trustees of Donations to the following congregations from a restricted Bishop's Directed Fund:

- St. Peter's Church, Beverly
- St. James's Church, Cambridge
- All Saints Church of the North Shore, Danvers
- St. Mary's Church, Dorchester
- Ascension Memorial Church, Ipswich
- St. Peter's Church, Osterville
- St. John St. James Church, Roxbury
- Trinity Church, Woburn

At the same time, the BDF's are also available to support initiatives identified by the bishop diocesan during the course of the year. For this reason, a small part of the total BDF income is held in reserve. For 2020, the BDF grants in the annual budget represent over 90% of the available BDF income for the year.

INCOME FROM OTHER SOURCES

Various other sources of income account for 14.9% of total income for 2020.

Property Rental

The diocese subleases three offices at the Cathedral Church of St. Paul to the Massachusetts Council of Churches on an annual basis.

Unrestricted Contributions and Miscellaneous Income

An estimated \$304,575 in income is derived primarily from contributions from participants in diocesan events and programs.

Annual Fund

The 2020 Annual Fund goal is set at \$300,000 to support mission initiatives. If the Annual Fund generates more than its goal, the income requirements from other sources potentially could be reduced or the additional funds could be allocated elsewhere.

Restricted Contributions to Mission Initiatives

Contributions include fundraising by the Chinese Ministry and Life Together. In 2020, these contributions are budgeted at \$133,771.

Grants

Grants received by diocesan programs are estimated at \$107,000 in 2020. The largest of these grants is \$30,000, a continuation of the grant from Episcopal City Mission to the Life Together program. Projected grants from external foundations total \$77,000.

In-Kind Income

This line reflects use by the Life Together program of diocesan property at 40 Prescott Street in Brookline, for offices and housing of fellows, valued at \$40,000, as well as \$42,000 for use of the rectory of the former Church of St. Luke and St. Margaret in Allston by the Charles River Episcopal Co-Housing Endeavor (CRECHE).

Fee Income from Mission Initiatives

This line reflects fees totaling \$407,855 received for Life Together site placements, consulting and rental fees, and for diocesan youth ministry programs.

Proceeds from Closed Congregations (No income projected for 2020)

The Closed Parish Net Proceeds Fund shows no income because the monies generated by the closing and sale of the Church of the Holy Spirit and its rectory in Wayland are frozen while decisions are made about the removal and relocation of cremated remains from the churchyard. Once this process is completed, a final accounting will be made available and use of the funds will be determined by Diocesan Council according to its policy for such funds. No decision has been made about properties of two other congregations closed in 2018, All Saints' Church in Stoneham and the Church of the Good Shepherd in Fairhaven, so no income is included.

EXPENSES

The following charts and cost center descriptions provide detail for each area of the 2020 budget. Each area of the budget is shown as follows: 2020 proposed budget with the 2019 budget (top) and the 2018 actuals (bottom) for comparison. Each row is identified by a specific cost center code and description.

As noted in the budget overview, there are seven expense areas:

- Mission Strategy Disbursements
 - Support for the Wider Church (pages 26-27)
 - Grants to Congregations (pages 28-30)
 - Resources for Clergy (pages 31-33)
 - Mission Initiatives (pages 34-40)
- Mission Strategy Support
 - Episcopate and Governance (pages 41-43)
 - Resources for Congregations (pages 44-45)
 - Facilities and Administration (pages 46-48)

Depending on the expense area, there are up to five columns of figures that break down each cost center into the following components:

Program Expenses: Main program activities for the cost center, including grants distributed

Compensation and Benefits: All compensation and benefit-related expenses, including 1099 payments to independent contractors. Salary and benefits for diocesan staff reflect a 3% cost of living increase and an estimated 6% increase in the cost of health care coverage for 2020.

Operational and Support Services: Travel, hospitality, office costs and other types of supporting expenses

Management and Professional Services: Payments to external service providers for accounting, legal, consulting, maintenance and other similar services

Program Revenue Offset: Revenue collected by the cost center's programs explicitly to offset its costs. These offsets represent the difference between gross expenses and net expenses within the budget.

**Charts for each expense area follow,
accompanied by a narrative explaining each item.**

“R” next to a cost center indicates full or partial funding from restricted sources.

Support of Wider Church						
2020 Budget, 2019 Budget and 2018 Actual						
Description	2020 Budget			2019 Budget		Total Expenses Net
	Program Expenses	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses Net	
CC3921 Barbara C. Harris Center -R	2,086	2,086	-	2,086	1,975	1,975
CC3931 Episcopal City Mission	30,000	30,000	-	30,000	30,000	30,000
CC3952 Native American Ministries	1,873	1,873	-	1,873	1,765	1,765
CC4251 Mass Council of Churches	50,000	50,000	-	50,000	50,000	50,000
CC3511 Sustainable Development Grants	39,376	39,376	-	39,376	47,536	47,536
CC4421 Province I Assessment & Program	16,179	16,179	-	16,179	16,179	16,179
CC4431 The Episcopal Church Assessment	817,000	817,000	-	817,000	805,000	805,000
Totals	956,514	956,514	-	956,514	952,455	952,455
-R Indicates expense is fully or partially funded by funds restricted for this use						
2018 Actual						
Description	2018 Actual		Revenue Offset	2018 Actual		Total
	Program Expenses	Total Expenses (Gross)		Program Expenses (Gross)	Total	
CC4251 Mass Council of Churches	50,000	50,000	(11,700)	38,300		38,300
CC4421 Province I Assessment & Program	16,179	16,179	-	16,179		16,179
CC4431 The Episcopal Church Assessment	800,737	800,737	-	800,737		800,737
Totals	866,916	866,916	(11,700)	855,216		855,216

-R Indicates expense is fully or partially funded by funds restricted for this use

Support for the Wider Church

The total 2020 budget for this area is \$956,514. The 2019 total was \$952,455.

- Restricted Endowments and Other: 3921, 3931, 3952

These amounts represent pass-throughs for endowments restricted for a particular use, including the Barbara C. Harris Camp and Conference Center, Episcopal City Mission and Native American ministry.

- Massachusetts Council of Churches: 4251

The diocesan contribution to the Massachusetts Council of Churches is level funded at \$50,000.

- Sustainable Development Grants: 3511

This category represents an allocation of 0.7% of unrestricted diocesan income in support of the UN Sustainable Development Goals for grants to partners in developing nations.

- Province I Assessment & Program: 4421

The diocese's contribution to Province I (the Episcopal dioceses in New England) is level funded at \$16,179.

- Episcopal Church Assessment: 4431

The 2018 General Convention set a fixed formula for the next three years which results in an \$817,000 ask for the Diocese of Massachusetts in 2020.

Description	Grants To Congregations				2019 Budget Total Expenses (Net)
	2020 Budget, 2019 Budget and 2018 Actual				
	Program Expenses	Operational & Support Svcs	Total Expenses (Gross)	Program Revenue Offset	
CC1213 Mass. Scholarship for African Students in America-	12,935	-	12,935	-	11,531
CC1001 Deaneries	-	4,800	4,800	-	4,800
CC1002 Deans	18,000	-	18,000	-	18,000
CC2131 Congregational Learning Events	20,000	2,500	22,500	-	22,500
CC2221 Program Support -workshops and training	5,000	-	5,000	(2,000)	3,000
CC2011 Congregational Development Open Grants	100,000	-	100,000	-	110,000
CC2012 Congregational Development Targeted Grants	60,000	-	60,000	-	60,000
CC2013 Bristol County Case Fund Grants-R	144,780	-	144,780	-	136,477
CC2014 Congregational Program Grants-R	36,694	-	36,694	-	36,694
CC1101 Priest-in-Charge Consulting	12,000	-	12,000	-	12,000
CC2161 Congregational Consultants	7,000	-	7,000	-	7,000
CC2015 Special Needs Ministry Grants	8,000	-	8,000	-	8,000
CC2021 Sending Serving Grants	48,000	-	48,000	-	48,000
CC2022 House of Mercy Grants	33,780	-	33,780	-	32,017
CC2031 Hispanic Ministries	25,000	-	25,000	-	25,000
CC2211 Congregational Professional Support	-	9,000	9,000	-	9,000
CC3411 Strategic Curacies -R	115,000	-	115,000	-	75,000
CC3431 African Ministries	35,000	-	35,000	-	35,000
Totals	681,189	16,300	697,489	(2,000)	654,019
-R Indicates expense is fully or partially funded by funds restricted for this use					
2018 Actual					
	Program Expenses	Operational & Support Svcs	Total Expenses (Gross)	Revenue Offset	Total Expenses (Net)
2018 Actual					
CC2011 Cong Dev Open Grants	110,000	-	110,000	-	110,000
CC2012 Cong Dev Targeted Grants	32,366	-	32,366	-	32,366
CC2013 Bristol County Case Fund Grants	130,414	-	130,414	-	130,414
CC2014 Congregational Program Grants	21,718	305	22,023	-	22,023
CC2015 Deaf Ministry Grants	3,002	-	3,002	-	3,002
CC2021 Sending Serving Grants	48,749	-	48,749	-	48,749
CC2022 House of Mercy Grants	33,685	-	33,685	-	33,685
CC2031 Hispanic Ministries	25,000	1,214	26,214	-	26,214
CC3431 African Ministries	20,000	2,595	22,595	-	22,595
	424,934	4,114	429,048	-	429,048

Grants to Congregations

Appendix D, pages 56-58, provides a chart of congregational grants in 2018.

The total gross 2020 budget for this area is \$697,489. A program revenue offset of \$2,000 yields a net budget of \$695,489. The 2019 budget total was \$654,019.

- **Mass. Scholarship for African Students in America: 1213**

This provides scholarship money from a restricted fund to assist students from the African continent studying in Massachusetts.

- **Deaneries and Deans: 1001, 1002**

This provides funding for gatherings of each of the 12 deaneries, deanery Confirmation expenses and expenses for each dean.

- **Congregational Learning Events: 2131**

This funds various formation, learning and resource-sharing events for congregational leaders.

- **Program Support–Workshops & Training: 2221**

The amount of \$5,000 covers workshop and training programs, with an offset of \$2,000 collected in fees.

- **Congregational Development Grants: 2011, 2012**

Congregational Development Open Grants, awarded by a grants committee, are funded at \$100,000. Congregational Development Targeted Grants, awarded at the discretion of the regional canons, are funded at \$60,000.

- **Bristol County Case Grants: 2013**

The draw for this grant program is \$144,780. 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 Program Grants: 2014**

This cost center contains specific grants to congregations funded by agency or trust endowments or supplemental sources. In the budget, agency endowments support grants to St. John's, Sharon (\$21,768), Christ Church, Plymouth (\$3,243) and Emmanuel Church, West Roxbury (\$3,992). A trust fund provides a grant to Emmanuel Church, Boston (\$7,691).

- **Priest-in-Charge Consulting: 1101**

The amount of \$12,000 funds the priests-in-charge consultants program.

- **Congregational Consultants: 2161**

The amount of \$7,000 is for the expenses incurred by congregational consultants, who help congregations with best practices in finances, buildings, leadership and stewardship.

- **Special Needs Ministry Grants: 2015**

The amount budgeted is a draw from the remainder of the diocesan agency fund (7004H) that in previous years supported the St. Andrew's of the Deaf congregation in Natick, which closed in 2011. It is level funded at \$8,000 by a partial draw from the endowment. The use of the proceeds from this closed congregation will be determined by Diocesan Council, which has designated the funds for persons with special needs.

- Sending Serving and House of Mercy Grants: 2021, 2022

Each of the 12 deaneries is charged with awarding grants from two specific diocesan funds to support outreach activities. Deanery assemblies set the criteria and determine awards. Each deanery has access to \$4,000 for Sending Serving grants, which require a match from grant recipients and are open to any outreach activity. The total in account CC2022 is available to the entire diocese for House of Mercy grants, which require a focus on women and children in need (no match necessary). The funding sources for the House of Mercy grants are agency endowment 7002Y.

- Hispanic Ministries: 2031

The 2020 budget designates \$25,000 to support Hispanic ministries in congregations.

- Congregational Professional Support: 2111

This funding, designated at \$9,000, provides consultation and other professional support, along with related expenses, for the congregations of the diocese.

- Strategic Curacies: 3411

This \$115,000 provides one and a half FTE positions for newly ordained clergy to serve in congregations where they will receive mentoring as part of their ongoing formation.

- African Ministries: 3431

The budget for grants to African congregations is funded at \$35,000.

Resources for Clergy

The total gross 2020 budget for this area is \$253,312, offset by \$90,600 for a net total of \$162,712. The 2019 net total was \$170,294.

- Newly Ordained Clergy: 1101

In the budget there is a total of \$20,000 for mentoring of newly ordained clergy by the Making Awesome Parish Priests (MAPP) program from the Bishop's Directed Funds.

- Sabbatical Grants for Clergy: 1211

The funds totaling \$25,000 for clergy sabbaticals come from two sources: an agency endowment fund in honor of Bishop Norman Nash (\$9,145) and a Bishop's Directed Funds grant (\$15,855).

- Diaconate Program: 1331

Estimated net \$0 after fees of \$24,000, based on projected participation. It includes expenses of the two archdeacons.

- Continuing Education: 1212

An amount of \$10,000 from the Bishop's Directed Funds for clergy continuing education.

- Scholarships for Clergy Dependents: 1221

An amount of \$30,000 from the Bishop's Directed Funds.

- Dill Campership: 1223

The spending policy income of \$3,379 is from a restricted Bishop's Directed Fund to support a scholarship to Camp O-At-Ka in Maine.

- Support for Retired Clergy: 1231

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 both receive distributions from agency funds as well as from trust funds where the organizations are named as income beneficiaries. These distributions help retired clergy and widows, widowers and orphans of clergy. The books and records of these two organizations, because they are separate 501(c)(3) organizations, are not part of the diocesan budget. Because retired clergy and their families are living longer, the funds from the agency and trust funds need funding support. The 2020 budget allocates \$17,000, \$5,300 for program and support expenses, including gatherings, and \$11,700 for additional grants. The Bishop's Directed Funds provide \$5,500 of this funding.

- New Call: 1321

New Call is a monthly gathering to support clergy in new assignments, funded at \$8,333.

- Clergy Family Network: 1341

An amount of \$1,000 based on prior spending patterns. The funds assist with periodic events for clergy of our diocese and their families as a way for fostering companionship and wellness.

- Pre-Lenten Retreat: 1411

Budgeted at net \$0 after collection of participant fees.

- Clergy Conference: 1421

This funds the annual three-day spring gathering of diocesan clergy. Budgeted at \$110,000 offset by \$63,000 in fees collected, for a total net expense of \$47,000.

- Clergy Day: 1411

This funds the annual one-day fall gathering of diocesan clergy. The expenses of \$3,000 are offset by \$2,000 in fees collected, for a total net expense of \$1,000.

Mission Initiatives									
2020 Budget, 2019 Budget									
2020 Budget									
Description	Program Expenses	Compensation	Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total 2020 Budget (Net)	2019 Budget
CC3061 -Grace Church Everett	40,000	-	-	-	-	40,000	-	40,000	30,000
CC3062 Kids In Community Lynn	12,900	-	-	-	-	12,900	-	12,900	-
CC3063 St. Andrews After School Program New Bedford	12,900	-	-	-	-	12,900	-	12,900	-
CC3058 ProGente Connections	12,900	-	-	-	-	12,900	-	12,900	-
CC3064 St. Peters Waltham	12,900	-	-	-	-	12,900	-	12,900	-
CC3056 Life Together	33,000	432,895	75,420	78,490	-	619,805	(444,805)	175,000	180,000
CC3111 MIT Campus Ministry	3,293	86,996	45,968	-	-	136,257	-	136,257	136,181
CC3121 Boston University Campus Ministry	83,500	-	-	-	-	83,500	-	83,500	80,000
CC3136 BC/NU Campus Ministries	10,000	97,096	18,468	-	-	125,564	-	125,564	102,785
CC3171 Tufts University Campus Ministry	32,001	-	-	-	-	32,001	-	32,001	31,015
CC3221 Grace Chapel Brocton	104,000	-	-	-	-	104,000	-	104,000	104,000
CC3231 St. Luke's/ San Lucas Chelsea	60,000	-	-	-	-	60,000	-	60,000	60,000
CC3241 Christ Church/San Juan Hyde Park	83,000	-	-	-	-	83,000	-	83,000	83,000
CC3251 St. Stephen's South End Boston	-	100,278	48,494	-	-	148,772	-	148,772	148,154
CC3311 Chinese Ministries Boston	10,000	30,000	5,000	-	-	45,000	(25,000)	20,000	30,000
CC3331 St. Mary's Dorchester	30,000	-	-	-	-	30,000	-	30,000	35,000
CC3341 San Pedro Salem	60,000	-	-	-	-	60,000	-	60,000	50,000
CC3351 Grace Church Lawrence	50,000	-	-	-	-	50,000	-	50,000	54,000
CC3371 St. Peter's The Bridge Dartmouth	35,000	-	-	-	-	35,000	-	35,000	40,500
CC3541 B-SAFE-R	185,000	-	-	-	-	185,000	-	185,000	190,000
CC3545 B-PEACE-R	40,000	-	-	-	-	40,000	-	40,000	40,000
CC3911 Cathedral Church of St Paul - Manna -R	18,000	-	-	-	-	18,000	-	18,000	21,000
CC3911 Cathedral Church of St Paul - Crossing -R	25,000	-	-	-	-	25,000	-	25,000	28,000
CC4337 C.R.E.C.H.E. -in kind use	-	-	-	42,000	-	42,000	-	42,000	-
Total - Mission Initiatives	953,394	747,265	193,350	120,490	-	2,014,499	(469,805)	1,544,694	1,443,635

-R Indicates expense is fully or partially funded by funds restricted for this use

Mission Initiatives										
	2018 Actual									
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total 2017 (Net)			
CC2014 Congregational Program Grants - Everett, Lynn	80,000	-	-	-	80,000	-	80,000			
CC2112 Spring Learning Event	5,000	-	3,226	52	8,278	(2,575)	5,703			
CC2113 Resource Day	10,159	-	1,888	-	12,047	(690)	11,357			
CC3000 Strategic Ministries	14,888	68,803	171,099	2,676	68,869	-	68,869			
CC3056 Life Together	-	453,019	-	-	641,682	(441,336)	200,346			
CC3111 MIT Ministry	-	154,211	450	-	154,661	(17,069)	137,592			
CC3121 Boston University	76,274	4,346	1,572	-	82,192	-	82,192			
CC3136 BC/ NU Combined	1,263	94,551	4,181	-	99,995	(750)	99,245			
CC3141 Northeastern	3,970	450	444	-	4,864	-	4,864			
CC3171 Tufts University Ministry	14,000	-	-	-	14,000	-	14,000			
CC3221 Brockton, Grace Chapel	-	155,402	163	-	155,565	-	155,565			
CC3231 Chelsea, St. Luke's / San Lucas	66,000	-	-	-	66,000	-	66,000			
CC3241 Hyde Park, Christ Church / San Juan	44,000	-	-	-	44,000	-	44,000			
CC3251 South End, St. Stephen's	-	145,462	-	-	145,462	-	145,462			
CC3311 Boston Cantonese Ministries	7,205	14,654	715	-	22,574	(1,280)	21,294			
CC3321 Quincy Chinese Congregation	-	-	-	-	-	-	-			
CC3331 Dorchester, St. Mary's	40,000	-	-	-	40,000	-	40,000			
CC3341 Salem, San Pedro	21,500	-	-	-	21,500	-	21,500			
CC3351 Lawrence, Grace Church	60,000	-	-	-	60,000	-	60,000			
CC3361 Watertown, Good Shepherd	15,000	-	-	-	15,000	-	15,000			
CC3371 So. Dartmouth, St. Peter's The Bridge	157,406	3,375	-	-	160,781	(22,628)	138,153			
CC3411 Urban Residents	80,534	100	-	-	80,634	-	80,634			
CC3511 Jubilee Global Mission	2,416	16,485	15,180	52	34,133	(820)	33,313			
CC3551 Committee on Palestine & Israel	-	-	3,862	-	3,862	(2,000)	1,862			
CC3541 B-SAFE	225,000	-	-	-	225,000	(500)	224,500			
CC3545 B-PEACE	41,500	-	312	-	41,812	(1,500)	40,312			
CC3551 Mission Through Partnerships	-	-	-	-	-	-	-			
CC3911 Cathedral Church of St Paul	49,000	-	-	-	49,000	-	49,000			
CC3921 Barbara C. Harris Center	-	-	582	-	582	-	582			
CC3931 Episcopal City Mission	30,000	-	-	-	30,000	-	30,000			
CC3952 UTO/ American Indians /CHS	1,103	-	-	-	1,103	-	1,103			
CC3953 Episcopal Relief and Development	-	-	2,853	9	2,862	-	2,862			
Totals	1,046,218	1,110,858	206,593	2,789	2,366,458	(491,148)	1,875,310			

-R Indicates expense is fully or partially funded by funds restricted for this use

-R Indicates expense is fully or partially funded by funds restricted for this use

Mission Initiatives

The total gross 2020 budget for this area is \$2,014,499, compared to the 2019 gross total of \$1,957,135. Program revenue from the Life Together program and income from Boston Chinese Ministries, both administered through the diocesan budget, yield a net budget total for 2020 of \$1,544,694, compared to the 2019 net total of \$1,443,635.

- **Grace Church, Everett: 3061**

Grace Church, Everett is a church that holds worship services in three different languages every Sunday: English, Dinka and French Creole. The three congregations are growing into one church as they nurture their children in the Christian faith. A grant of \$40,000 supports this community.

- **Kids in Community, Lynn: 3062**

A grant of \$12,900 funds this program at St. Stephen's, Lynn. Kids in Community provides afterschool programs for neighborhood children at low cost.

- **St. Andrew's, New Bedford Afterschool Program: 3063**

A grant of \$12,900 provides support to this afterschool initiative begun as part of the South Coast Mission Hub. The parish was asked by parents and children to provide additional programming for middle school youth. Diocesan support provides seed money for this effort.

- **ProGente Connections, Framingham: 3058**

A grant of \$12,900 supports work among the Brazilian community in Framingham begun as part of the Metrowest Mission Hub. ProGente Connections is housed at St. Andrew's, Framingham, and is supported by Episcopal, Lutheran and Brazilian Presbyterian churches. It provides Portuguese and English language classes and engages in immigrant advocacy and support.

- **St. Peter's, Waltham: 3064**

A grant of \$12,900 supports this largely Ugandan congregation which was received as a mission in 2018. It seeks to serve the immigrant communities in and around Waltham through immigration clinics and education around drug abuse.

- **Life Together: 3056**

Life Together is a year-long residential Christian formation program for young adults between the ages of 21 and 32. During their fellowship year, all Life Together fellows work for social justice in schools, nonprofit organizations and Episcopal churches across the diocese; pursue their own formation through a Christian formation curriculum centered around prayer, spiritual practice, skill-based leadership training and community; and live in intentional community with one another.

Eighty percent of alumni serve in some capacity in their churches and communities. Thirty percent of Life Together fellows continue on to ordination in the Episcopal Church and other Christian denominations. Eight alumni are currently discerning ordination in the Diocese of Massachusetts. In the 2019-2020 program year, Life Together will host 14 young adults in three intentional communities across eastern Massachusetts:

- Micah Fellows are first-year fellows based in the greater-Boston area.
- Emmaus Fellows, second-year fellows based in the greater-Boston area, focus on deepening the capacity of site partners and the individual formation of the fellows.
- Esperanza Academy Teaching Fellows—This is a partnership between Life Together and Esperanza Academy in Lawrence, focused on training teachers and leaders who want to work for change through the education system. The Esperanza Academy Teaching Fellows teach classes, work and coach in the extended-day program of the school as well as joining the Boston fellows for monthly leadership trainings.

Funding: Over the past several years, Life Together has built strong partnerships to secure substantial outside funding, resulting in a diverse and balanced funding structure. Including in-kind estimates, the total budget for the coming year is \$619,805. External funding sources include fees from sites where fellows are employed (at an average of \$11,455), fundraising and grants. Diocesan funding in 2020 is set at \$175,000.

Housing: Life Together fellows live in intentional communities at three sites: diocesan property at 40 Prescott Street in Brookline; rented housing at a rectory owned by St. Michael's Church in Milton; and at a house owned by Esperanza Academy.

• MIT Campus Ministry: 3111

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain employed by our diocese (\$136,257) plus program expenses, from a restricted endowment, of \$3,293. The ministry may raise additional funds through the MIT development office. In addition to two agency endowment funds that support campus ministry in general, an additional agency fund and a Bishop's Directed Fund provide support for the MIT ministry. Our chaplain splits her time between the activities of the Lutheran-Episcopal Ministry and the administration of Radius at MIT, which encourages students to reflect on and take action on the ethical issues of their day.

• Boston University Campus Ministry: 3121

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, funded for 2020 at \$83,500 to reflect a cost of living increase. The Episcopal chaplain participates in the religious life of the university and provides worship opportunities in the Episcopal tradition.

- Boston College-Northeastern University Campus Ministries: 3136

These two universities share the services of a full-time chaplain employed by our diocese (\$125,564). Each of these campus ministry programs is allotted \$5,000 for program support, included in this total.

The Episcopal Community at Boston College serves as a progressive Christian faith community at this Jesuit university. Through the efforts of the chaplain, in collaboration with the Church of the Redeemer, Chestnut Hill, the ministry has been revitalized and has a new executive board of student leaders. New programs and initiatives have begun.

Open Table is the Lutheran-Episcopal Chaplaincy at Northeastern University. Our chaplain collaborates with Northeastern's Center for Spirituality, Dialogue and Service to provide worship opportunities, pastoral care, service opportunities, spiritual formation and community.

- Tufts University Campus Ministry: 3171

An amount of \$32,001 provides one-half of the compensation for the Protestant chaplain, an Episcopal priest, at Tufts. The 2020 amount reflects cost-of-living increase for the half-time position. 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 main-line Christian traditions, and especially the tradition of the Episcopal Church.

- Grace Chapel, Brockton: 3221

Grace Chapel, Brockton is a vibrant multicultural Episcopal/Anglican faith community 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. It became a mission of our diocese at the 2018 convention. This congregation worships and has office space in the First Lutheran Church in Brockton. The 2020 budget includes a grant to the congregation of \$104,000.

- St. Luke's-San Lucas, Chelsea: 3231

A grant of \$60,000 supports this growing community that seeks to bring Jesus' love to the community, both through multicultural and bilingual worship and outreach programs. It reaches out into the community 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.

- Christ Church-Iglesia San Juan, Hyde Park: 3241

A grant of \$83,000 supports this Christ Church parish and Iglesia San Juan mission in Hyde Park. The congregations primarily serve the Nigerian and Hispanic immigrant communities that live in and around Hyde Park. They support a program that brings music lessons to children in the community and encourage vibrant, musical expression in their worship services.

- St. Stephen's, Boston: 3251

This line covers compensation and benefits for the vicar at St. Stephen's Church in Boston's South End, through the diocesan payroll (\$148,772). 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 the struggle for justice.

- Boston Chinese Ministries: 3311

The Boston Chinese Ministry is located at the Cathedral Church of St. Paul. It is currently taking stock of its past and making plans for its future. It is a small congregation that has recently had three baptisms. The diocesan budget provides a grant of \$20,000. The largely Cantonese-speaking congregation raises additional funds for its ministries through contributions and grants, projected at \$25,000 for 2020.

- St. Mary's, Dorchester: 3331

The amount of \$30,000 supports this congregation in Dorchester which worships in English and Spanish. St. Mary's celebrates "God's Rhythm, Delight in God's Flavor and unites in God's Power through ministries of Joy, Diversity and Justice" as it embraces the Jesus movement. It is growing its Latinx and social justice ministries.

- St. Peter's-San Pedro, Salem: 3341

The \$60,000 grant in the 2020 budget will help the St. Peter's-San Pedro congregation which serves English and Spanish-speaking communities in Salem. The parish is experiencing significant growth in its Latino congregation. Last year, it made significant repairs to its historic church and welcomed a new bilingual priest. It has an active food pantry and thrift store.

- Grace Church, Lawrence: 3351

The \$50,000 grant in the 2020 budget supports this English and Spanish-speaking congregation in Lawrence. The congregation hosts community events, sponsors activities for youth and feeds the hungry. It was able to be helpful during the catastrophic natural gas situation last fall that affected Lawrence and surrounding communities. Esperanza Academy, a tuition-free, independent middle school in the Episcopal tradition welcoming girls of diverse faiths, races and cultures, is housed on the Grace Church campus.

- The Bridge, Dartmouth: 3371

Funding is to support an initiative of St. Peter's Church in Dartmouth to provide mental health outpatient support services to the greater New Bedford area. The Bridge is housed at St. Peter's, staffed by professionals, serving a vital need in the community, and funded through diocesan support, participant fees and independent fundraising. Its mission is to provide psychological, emotional and spiritual care through 1:1 counseling and therapy. The \$35,000 budget is for continuing support of this program.

- B-SAFE: 3541

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 six summer enrichment programs in Boston and Chelsea, serving 350 elementary schoolers, providing 150 middle schoolers with leadership and life skills education and 250 teens and young adults with professional development training and employment in the programs. As a separate 501(c)3, St. Stephen's Youth Programs, which supports the B-SAFE and B-PEACE programs, has its own set of financial controls and development efforts. For 2020 the program is budgeted a diocesan contribution of \$185,000 from diocesan and bishop's resources.

- B-PEACE for Jorge: 3545

Established by Diocesan Convention in 2012, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge campaign is funded at \$40,000 from Bishop's Directed Funds. The campaign addresses the root causes of gun violence through five focus areas: programs for youth, employment for teens, academic excellence in schools, communities of support for families and an end to gun violence through meaningful reform. St. Stephen's Youth Programs, Boston provides staff and fundraising support for this effort. Volunteers from across the diocese, as well as interfaith and civic partners, are committed to the campaign's projects to help end violence.

- Cathedral Church of St. Paul, Boston: The Crossing and MANNA: 3911

An \$18,000 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 our community.

A \$25,000 grant is budgeted 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.

- CRECHE: 4337

This line item of \$42,000 reflects the value of in-kind use of the rectory at the former Church of St. Luke and St. Margaret in Allston, now closed. The diocese has entered 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 this rectory 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 founded its first community which now resides in a five-bedroom house in Newton Centre. CRECHE is a collaborative effort between four congregations: Emmanuel Church, Boston; St. Bartholomew's, Cambridge; The Crossing, Boston; and the Episcopal Chaplaincy at MIT.

Episcopate and Governance									
2020 Budget, 2019 Budget and 2018 Actual									
Description	2020 Budget					2019 Budget			
	Program Expenses	Compensation	Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses (Net)
CC4000 Episcopal and Diocesan Support	-	350,877	155,893	-	-	506,770	-	506,770	287,299
CC4011 Bishop Diocesan	-	190,713	55,236	57,500	-	303,449	-	303,449	301,954
CC4012 Bishop Suffragan	-	157,628	40,489	32,500	-	230,617	-	230,617	224,243
CC4014 Canon to the Ordinary	-	132,258	44,142	12,500	-	188,900	-	188,900	185,667
CC4021 Assisting Bishops	-	-	-	30,000	-	30,000	-	30,000	30,000
CC4023 New Bp Transition Reserve	-	-	-	30,000	-	30,000	-	30,000	30,000
CC4024 Staff Sabbatical Reserve	-	-	-	20,000	-	20,000	-	20,000	20,000
CC4142 Lambeth Conference Reserve	-	-	-	5,000	-	5,000	-	5,000	-
CC4031 Chancellor	-	-	-	1,500	-	1,500	-	1,500	1,500
CC4061 Title IV	-	-	-	-	15,000	15,000	-	15,000	20,000
CC4099 Diocesan Contingency Reserve	-	-	-	15,047	5,000	20,047	-	20,047	97,126
CC4111 Diocesan Council	-	-	-	10,000	-	10,000	-	10,000	20,000
CC4112 Mission Implementation	-	-	-	40,000	-	40,000	-	40,000	50,000
CC4121 Standing Committee	-	-	-	3,000	-	3,000	-	3,000	3,000
CC4141 Diocesan Convention	25,000	-	-	27,000	-	52,000	(5,000)	47,000	55,000
CC4151 Journals and Diocesan Directory	-	-	-	5,000	-	5,000	-	5,000	12,000
CC4211 Archives	-	-	-	50,000	-	50,000	-	50,000	50,000
CC4311 Development Office	35,000	-	-	30,000	-	65,000	-	65,000	276,503
CC4261 Interreligious Commission	-	-	-	1,500	-	1,500	-	1,500	1,500
CC4411 General Convention Reserve	-	-	-	18,000	-	18,000	-	18,000	18,000
Totals	60,000	831,476	295,760	388,547	20,000	1,595,783	(5,000)	1,590,783	1,683,792
2018 Actual									
	Program Expenses	Compensation & Benefits		Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Revenue Offset	Total	
CC4000 Episcopal and Diocesan Support	-	299,445		215	-	299,660	-	299,660	
CC4011 Bishop Diocesan	63,081	199,826		52,891	161	315,959	-	315,959	
CC4012 Bishop Suffragan	5,234	188,427		39,012	112	232,785	-	232,785	
CC4014 Canon to the Ordinary	-	178,136		12,896	-	191,032	-	191,032	
CC4021 Assisting Bishops	-	35,460		7,451	-	42,911	-	42,911	
CC4022 Retired Bishops	-	-		47	-	47	-	47	
CC4023 New Bishop Election Reserve	-	-		30,000	-	30,000	-	30,000	
CC4031 Chancellor	-	-		-	-	-	-	-	
CC4061 Title IV	-	2,600		1,767	8,700	13,067	-	13,067	
CC4099 DL Budgeted Resources	1,904	49,770		29,127	39,806	120,607	-	120,607	
CC4111 Diocesan Council	-	300		9,122	-	9,422	-	9,422	
CC4112 Mission Strategy	-	1,500		2,496	-	3,996	-	3,996	
CC4121 Standing Committee	-	-		2,953	-	2,953	-	2,953	
CC4141 Convention	-	925		94,350	444	95,719	(25,927)	69,792	
CC4151 Journals and Diocesan Directory	-	-		-	-	-	-	-	
CC4211 Archives	-	22,280		1,729	488	24,497	(520)	23,977	
CC4261 Ecumenical Committee	-	490		1,601	-	2,091	-	2,091	
CC4311 Development Office	-	128,963		13,663	2,638	145,264	(36,564)	108,690	
CC4312 Annual Fund	-	225		5,735	19	5,979	(1,400)	4,579	
CC4411 General Convention	-	-		54,094	329	54,423	-	54,423	
Totals	70,219	1,108,347		359,139	52,697	1,590,402	(64,411)	1,525,991	

Episcopate and Governance

The total 2020 gross budget for this area is \$1,595,783, with a program revenue offset of \$5,000, for a net total of \$1,590,783. The 2019 net total was \$1,683,792.

- **Episcopal and Diocesan Support: 4000**

This line includes compensation of \$350,877 for three administrative support positions and the development office, with benefits costs of \$155,893.

Staff included in these aggregate numbers are the executive assistants for the bishop diocesan and bishop suffragan, the assistant for governance and administration who also supports the canon to the ordinary, the director of development and a half-time assistant for development. For a complete list of diocesan staff see Appendix F on pages 60-61.

- **Bishop Diocesan: 4011**

This cost center includes compensation of \$190,713 for the bishop diocesan, benefits costs of \$55,236, as well as a budget for expenses of \$57,500. Compensation for the bishop diocesan includes the value of living in diocesan-owned housing, which is reflected in cost center 5122 under “Facilities and Administration” as a revenue offset.

- **Bishop Suffragan: 4012**

This cost center includes compensation of \$157,628 for the bishop suffragan, benefits costs of \$40,489, as well as a budget for expenses of \$32,500.

- **Canon to the Ordinary: 4014**

This cost center includes compensation of \$132,258 for the canon to the ordinary, benefits costs of \$44,142, as well as a budget for expenses of \$12,500.

- **Assisting Bishops: 4021**

Stipends and costs for assisting bishops, as needed, budgeted at \$30,000.

- **New Bishop Transition Reserve: 4023**

In January 2015, Diocesan Council established a long-term fund and seeded it with \$250,000 to pay for the costs associated with discernment, election and transition. Council’s goal is to contribute \$50,000 per year out of the budget. This year’s contribution is set at \$30,000, which will be added to the \$250,000 extraordinary allocation that Council voted in January 2015, along with subsequent contributions, bringing the total balance in the reserve to \$420,000.

- **Staff Sabbatical Reserve: 4024**

Beginning in 2019, a reserve account is established to fund future sabbaticals of the bishop diocesan and the canons. An amount of \$20,000 is added to this reserve each year.

- **Lambeth Conference Reserve: 4142**

An amount of \$5,000 is budgeted to fund the cost of attendance of our bishops at the Lambeth Conference, a gathering of the bishops of the Anglican Communion generally held every 10 years.

- Chancellor: 4031

An amount of \$1,500 budgeted, with every effort made to assign legal costs to the specific cost center(s).

- Title IV: 4061

Canonical clergy disciplinary process, budgeted at \$15,000 for 2020. This includes \$3,000 stipends for three non-staff intake officers.

- Diocesan Contingency Reserve: 4099

The entire budgeted amount of \$20,047 for 2020 represents funding for contingencies and emergencies.

- Diocesan Council: 4111

The 2020 budget of \$10,000 is for expenses of Diocesan Council meetings and retreats.

- Mission Implementation: 4112

An amount of \$40,000 to fund the process of implementing the mission strategy required by canon.

- Standing Committee: 4121

The 2020 budget of \$3,000 is for expenses of Standing Committee meetings and retreats.

- Diocesan Convention: 4141

The 2020 gross budget of \$52,000, with revenue offset of \$5,000, for a net budget of \$47,000 assumes a two-day convention, and includes costs for voting and electronic equipment rental.

- Journals and Diocesan Directory: 4151

This line is funded at \$5,000, with an effort to move toward digital resources.

- Archives: 4211

Funded at \$50,000, including anticipated expenses for archive storage and digitalization, as well as stipends for college students who assist with our archives as part of their field education.

- Development Office: 4311

An amount of \$35,000 is budgeted for events, mailings and other expenses, together with \$30,000 in operational and support services, for a total of \$65,000. Annual Fund costs are included.

- Ecumenical and Interreligious Commission: 4261

Budgeted at \$1,500 for expenses of our two ecumenical officers.

- General Convention: 4411

A reserve to prepare for the expenses of sending a delegation to the Episcopal Church's triennial General Convention in 2021, \$18,000 will be accrued each year between conventions.

Resources for Congregations									
2020 Budget, 2019 Budget and 2018 Actual									
Description	Expenses	Compensation	Benefits	2020 Budget			2019 Budget		
				Support Svcs	Prof Svcs	(Gross)	Revenue Offset	(Net)	2019 Budget (Net)
CC1000 Support for Congregations -Personnel	-	972,346	376,284	70,000	-	1,418,630	-	1,418,630	1,231,086
CC1201 Clergy Transition Administration	-	-	-	-	2,000	2,000	(2,000)	-	-
CC1212 Continuing Education for Personnel	-	-	-	5,000	-	5,000	-	5,000	-
CC1311 Commission on Ministry	36,000	-	-	18,000	-	54,000	(7,000)	47,000	47,000
CC1312 Seminars	54,000	-	-	-	-	54,000	-	54,000	63,907
CC1500 Support For Networks	-	-	-	10,000	-	10,000	-	10,000	-
CC2132 Safe Church	6,000	-	-	-	-	6,000	-	6,000	-
CC2231 Committee Support	-	-	-	2,000	-	2,000	-	2,000	10,000
CC2311 Diocesan Communications Operating Exp.	-	-	-	42,000	-	42,000	-	42,000	40,000
CC3001 Young Adult Initiatives	20,000	-	-	-	-	20,000	-	20,000	-
CC3011 Youth Ministry -R	67,500	-	-	5,000	-	72,500	(30,000)	42,500	148,358
CC3012 Youth Leadership Academy	44,000	-	-	6,000	-	50,000	(40,000)	10,000	13,000
CC4131 Diocesan Youth Council	7,500	-	-	-	-	7,500	-	7,500	7,500
Totals	235,000	972,346	376,284	158,000	2,000	1,743,630	(79,000)	1,664,630	1,560,851
-R Indicates expense is fully or partially funded by funds restricted for this use									
2018 Actual									
Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Expenses (Net)			
CC1000 DC & C	413,776	-	-	413,776	-	413,776			
CC1001 Deaneries	300	2,434	-	2,734	-	2,734			
CC1002 Deans	4,831	-	-	4,831	-	4,831			
CC1003 Deanery Confirmations	300	709	-	1,009	-	1,009			
CC1101 Congregations	7,039	1,239	-	8,278	-	8,278			
CC1111 Transition Ministries	816	12,593	-	13,409	-	13,409			
CC1201 Clergy	-	-	2,845	2,845	(3,415)	(570)			
CC1212 Continuing Education	4,375	641	-	5,016	-	5,016			
CC1311 Commission on Ministry	2,733	24,660	27,098	55,642	(10,760)	44,882			
CC1312 Seminars	67,000	16	-	67,016	(18,955)	48,061			
CC1321 Fresh Start Program	300	3,317	-	3,617	-	3,617			
CC1331 Diaconate Program	1,721	15,808	21,829	39,358	-	39,358			
CC1341 Clergy Family Network	-	-	-	-	-	-			
CC1411 Pre Lenten Retreat	-	2,000	-	2,000	(1,502)	498			
CC1431 Clergy Day	535	640	693	1,868	(66,784)	1,084			
CC1500 Missioner for Networking & Formation	-	640	66	706	(2,615)	(1,909)			
CC1511 Canon for N&W Region	7,441	69,960	10,449	88,850	(1,280)	87,570			
CC1512 Canon for Southern Region	-	48,182	3,742	51,924	-	51,924			
CC1513 Canon for Central Region	-	54,583	4,775	59,358	(350)	59,008			
CC1514 Canon for Immigration & MultiCultural	-	24,537	2,256	26,793	-	26,793			
CC2000 Congregational Resources and Training	-	277,786	1,329	279,115	-	279,115			
CC2001 Coburn Fund	6,750	5,000	4,599	16,349	-	16,349			
CC2111 CRT Events	-	500	894	1,394	(315)	1,079			
CC2131 CRT Workshops	-	-	1,565	1,565	(125)	1,440			
CC2132 Anti-Racism	-	500	416	916	-	916			
CC2133 Safe Church	192	950	2,488	3,630	(1,580)	2,050			
CC2151 Resource Center	427	206	-	633	-	633			
CC2161 Congregational Consultants	131	5,000	2,638	7,769	(1,840)	5,929			
CC2200 CRT Support	-	-	7	7	-	7			
CC2211 Congregation Support	1,828	1,870	5,895	9,634	(2,565)	7,069			
CC2222 Family Camp	3,899	-	-	3,899	-	3,899			
CC2231 Committee Support	-	233	1,617	1,850	-	1,850			
CC2311 Diocesan Communications	1,500	-	7,792	9,292	-	9,292			
CC2312 FYI Newsletter	-	-	2,125	2,125	-	2,125			
CC3011 Youth Ministry	52,217	105,058	6,500	163,775	(31,147)	132,628			
CC3012 Youth Leadership Academy	240	1,680	222	2,142	(70)	2,072			
CC4131 Diocesan Youth Council	11,088	1,000	1,563	13,651	(3,846)	9,805			
Totals	183,977	1,039,175	289,889	1,550,654	(147,049)	1,403,605			

-R Indicates expense is fully or partially funded by funds restricted for this use

Resources for Congregations

The total 2020 gross budget for this area is \$1,743,630, less \$79,000 in program revenue offsets, for a net total of \$1,664,630. The 2019 net total was \$1,560,851.

- **Support for Congregations–Personnel: 1000**

This line contains the total compensation costs of \$972,346 plus benefits costs of \$376,284, together with \$70,000 in operational and support services. Total personnel costs in this budget area are \$1,418,630. Staff included in this area are the three regional canons, the canon for immigration and multicultural ministries, the canon for ordained ministries, the communications director and communications assistant, the missionary for networking and formation, the youth missionary, one and a half administrative FTE positions and a part-time assistant for clergy records. For a complete list of diocesan staff see Appendix F, pages 60-61.

- **Clergy Transition Administration: 1201**

An amount of \$2,000 to cover the cost of Oxford Document background checks, offset by fees, for a net budget of \$0.

- **Continuing Education for Personnel: 1212**

This line budgets \$5,000 for continuing education of diocesan staff in this area.

- **Commission on Ministry: 1311**

This program's net cost is budgeted at \$47,000, including \$10,000 for the Commission on Ministry's priority to fund seminarians whose first language is not English. The credit of \$7,000 is for fees paid by those in the ordination process, such as those for background checks.

- **Seminarians: 1312**

Scholarships for seminarians in the ordination process. The amount of \$54,000 is based on average use in recent years from an agency endowment fund for this purpose.

- **Support for Networks: 1500**

The mission strategy calls for "connecting and equipping networks of lay people, clergy and diocesan staff members who share a passion for particular forms of service and public advocacy." A primary focus for the missionary for networking and formation is to facilitate the work of networks already at work and others which will emerge to lead our diocese in Christian formation and discipleship, public advocacy and witness and service to particular communities. This line item of \$10,000 helps to fund the development of these networks.

- **Safe Church: 2133**

The line includes \$6,000 to facilitate Safe Church training in congregations.

- **Committee Support: 2231**

An amount of \$2,000 to provide hospitality and support for diocesan committees.

- **Diocesan Communications: 2311**

The 2020 budget is funded at \$42,000 to support a multidimensional, multimedia communications program promoting mission and ministry of our diocese and serving diverse internal and external constituencies.

- **Young Adult Initiatives: 3001**

In 2018 Diocesan Convention established a task force to examine successful models of engagement of adults in their 20s and 30s within and beyond the diocese; \$20,000 is allocated in the budget to fund young adult initiatives arising from the work of this task force.

- **Youth Programs: 3011, 3012, 4131**

The diocesan youth ministry develops and implements programs and retreats for middle and high school youth, including pre-Confirmation retreats, the Youth Leadership Academy, Diocesan Youth Council and an annual mission outreach program.

Facilities and Administration

The total 2020 gross budget for this area is \$1,828,568, offset by \$220,575, for a net budget of \$1,607,993. The 2019 budget total was \$1,310,479.

- **Administrative Services–Personnel: 5000**

This line contains compensation for staff assigned to this area. Compensation totals \$545,639, with benefits costs of \$181,630. Total personnel costs in this line are \$727,269.

Staff included in this area are the chief business officer, controller, two accountants, IT manager, payroll and benefits manager and a part-time sexton. For a complete list of diocesan staff see Appendix F, pages 60-61.

- **Administrative Services: 5011**

This cost center includes support expenses of \$40,600 (office supplies, licenses, dues) along with outside service fees, including payroll and audit, totaling \$83,500. The cost center overall shows a net expense of \$1,733, as the Treasurer's Office receives \$122,367 in fee income for financial and administrative services provided, and helps offset payroll costs associated with this work in line 5000. The largest sources of fee income are the Cathedral Church of St. Paul (\$63,367) and the Trustees of Donations (\$34,000). In addition, the administrative services area receives \$25,000 per year from the Stokes Fund program to cover administrative costs associated with the loan program.

- **Human Resources: 5021**

A consultant is available to support human resources, budgeted at \$6,000.

- **Information Technology: 5031**

The costs in this area cover important aspects of our operations including networking, software and hardware, Internet, telephone and conferencing, office equipment and electronic intrusion detection and prevention. The \$76,000 in costs are partially offset by fees received from the Cathedral Church of St. Paul of \$40,200, for a net cost of \$35,800.

- **Risk Management: 5041**

This amount is adjusted to \$72,649, based on projections related to the cost of insurance.

- **Investments Expense: 5051**

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) for making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2020 is \$6,000.

- **Boston, 138 Tremont Street: 5111**

Included in this budget cost center is \$450,000 for payment in lieu of rent to the Cathedral Church of St. Paul and approximately \$54,550 for office equipment and postage. This expense is offset by rent payments of \$15,600 received from the Massachusetts Council of Churches for subleased office space. Net total for this line is \$488,950.

- **Brookline, 40 Prescott Street: 5121**

Cost of maintaining this property is budgeted at \$20,000. A part-time staff member is budgeted in the compensation section.

- Boston, Commercial Wharf, Unit 6: 5122

This cost center reflects \$15,000 in condominium fees for the bishop's residence offset by a credit of \$42,408 which reflects the reduction in the bishop's cash salary in exchange for diocesan-provided housing. The amount of this credit was set using the Church Pension Fund guidelines for provided housing in conjunction with the fair market value of the property.

- Allston, St. Luke's and St. Margaret's: 5125

The property reverted back to the diocese in 2009 after the Church of St. Luke and St. Margaret closed. The diocese has been paying for its upkeep ever since receiving direct responsibility for the property. Bishop Gates, staff and Standing Committee continue to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The budget allocation for this property is \$15,000 in 2020. A part-time staff member also provides services and that cost is included in the compensation line. The rectory on this property is now leased to CRECHE with an associated in-kind value (this is reflected in cost center 4337 in the Mission Initiatives section of the budget, as well as in a comparable amount in the In-Kind Revenue section of the Income section of the budget).

- Diocesan Properties Professional Fees: 5141

This cost center includes \$10,000 for a consultant on the status and sales of diocesan properties. In addition, there is a reserve for property maintenance established formally by Diocesan Council in January 2015 and seeded with \$650,000, with a current balance, before expenses, of \$750,000. The funding of this reserve in prior years is replaced by the recognition of depreciation expense described in cost center 7501.

- Depreciation—Equipment and Property: 7501

An amount of \$252,000 to be added to a depletion and reserve fund which will be used to replace or purchase new capital equipment (computers, servers, copiers, etc.). This brings the budget in compliance with the accounting principles utilized in our audits.

APPENDIX A: AGENCY ENDOWMENT FUNDS AND RESERVE ACCOUNTS

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.

Unrestricted Agency Endowment Funds

The General Endowment Fund (DIT 7002X, proposed draw \$116,832)

This fund is special since it serves as the “cushion” and first source of funds when extraordinary circumstances arise. 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 HVAC renovations to the 138 Tremont 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.

The Fund for Congregational Vitality (DIT 7004I, proposed draw \$186,373)

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, cost centers 2011 and 2012.

Deaf Ministry Endowment (DIT 7004H, proposed draw \$28,953)

The annual draw supports congregational grants. This fund stems from one-half of the resources of the closed congregation, St. Andrew’s of the Deaf, and Diocesan Council has kept these proceeds separate from its “use of closed parish proceeds” grant process. Instead, the fund is currently used to support the grants supplied through cost center 2015.

Endowment Fund - Roslindale (DIT 7002Z, proposed draw \$4,230)

The fund was established from the endowment fund from 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 through cost center 2014.

Restricted Agency Endowment Funds

John B. Coburn Endowment Fund (DIT 7002C, proposed draw \$58,814)

The Rt. Rev. John B. Coburn, the 13th bishop, served from 1976 to 1986. Upon his retirement, Council established this fund in his honor to support “a Chair of Theology for the Mission of the Church.” The Coburn Fund is used to support theological programs and to bring visiting scholars to our diocese in ways that will support congregational ministry.

Proceeds from the 1964 Diocesan Advance Fund (DAF)

In 1964 the people of the diocese led a \$5-million campaign, called the Diocesan Advance Fund, and Council subsequently created several endowment accounts from part of the proceeds.

DAF Bishop Nash Fund (DIT 7002M, proposed draw \$9,703)

The Rt. Rev. Norman Nash was the 10th bishop, serving from 1947 to 1956. This fund in his honor supports the clergy sabbatical program, cost center 1211.

Clergy Salary Fund (DIT 7002N, proposed draw \$35,632)

This fund was established to provide support for parish-based clergy, and the Grants to Congregations area of the budget is the current implementation of this policy (e.g., cost centers 3231, 3241, 3251, 3341, 3351).

Campus Ministries Fund (DIT 7002U, proposed draw \$11,209)

Supporting campus ministry was a goal of the DAF, and this work continues in the Mission Initiatives area, cost centers 3111 through 3171.

Stokes Loan Program (Fidelity Short Term Bond Fund, ongoing loan program)

More than half of the DAF 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 Diocesan Advance Fund campaign).

Proceeds from the 1983 Adventure In Mission (AIM) Campaign

In 1983 the people of the diocese led another campaign, called Adventure In Mission. Again, Council created several endowment funds from a portion of the proceeds.

AIM Christian Witness in Education (DIT 7003C, proposed draw \$44,656)

This continues the effort to support campus ministries in cost centers 3111 through 3171.

Youth on Mission (DIT 7003E, proposed draw \$8,464)

This fund supports the diocesan youth program, in cost center 3011.

AIM William Coolidge Endowment Fund (DIT 7003F, proposed draw \$176,198)

This fund provides broad support for programs offered in the Support for Congregations and Mission Initiatives areas of the budget.

AIM Hospital Ministry (DIT 7002J, proposed draw \$26,956)

Hospital ministry was a part of both the DAF and the AIM campaigns, and archival evidence suggests that this fund has its roots in the 1960s DAF drive. In recent years, hospital ministry has not had a high profile in the annual budget. The clergy supported through various cost centers do provide hospital ministry as a regular part of their service.

Other Various Council Designations

Frederick C. Lawrence/Rhineland Fund (DIT 7002P, proposed draw \$11,892)

The Rt. Rev. Frederick C. Lawrence was bishop suffragan from 1956 to 1968. He also served as the chairman of the Bishop Rhineland Foundation, which provided support for Harvard-Radcliffe chaplaincy. Council established a fund in his honor upon his retirement, and for the next 12 years the draw supported the Rhineland Foundation. The draw has supported college ministry work in Cambridge through the Life Together program and the MIT chaplaincy.

African Scholarship Fund (DIT 7002E, proposed draw \$12,235)

Council created this fund in 1988 for a scholarship program for African students, currently supported through the MSASA program, cost center 1213.

Endowment for Maintenance (DIT 7002G, proposed draw \$9,455)

Council in 1990 created this fund with the proceeds of a bequest. The written record from that time recommended that future Councils direct one-third of future bequests to this fund account, at least until it reached a balance of \$500,000. In January 2015 Council voted to establish the Reserve Endowment Fund (described on page 49) and to formally replace the 1990 policy. The motivation to do so was to separate the ministry of maintenance from the random arrival of bequests. The spending draw from this existing endowment account will continue to support regular maintenance needs through cost centers 5111 through 5125.

Seminarian Education Endowment Fund (DIT 7004E, proposed draw \$59,313)

Created to support seminarian education through the scholarship program in cost center 1312.

Council Designation of Proceeds from Other Properties

Eliza Gray Case TRS P E C (DIT 7002T, proposed draw \$144,780)

Council received these funds when the Eliza Gray Case home was sold. The legal review of the sale determined that the funds can be used for the Sherrill House in Boston, for general purposes of the diocese or for purposes in southeast Massachusetts. The current application is to support the Bristol County Case Grants program, cost center 2013.

House of Mercy Fund (DIT 7002Y, proposed draw \$33,718)

Council received these funds when the Works of Mercy was dissolved in 1975. The current application is to support grants through the 12 deanery assemblies for community outreach programs, cost center 2022.

Designation of Gifts and Bequests for Diocesan Operations

These funds provide general support for diocesan operations.

Adelaide R. Harris Fund (DIT 7002S, proposed draw \$229)

R. W. Chisolm Fund (DIT 7003R, proposed draw \$4,219)

Designation of Gifts and Bequests for Diocesan Programs

Thomas M. Coffin Fund (DIT 8000V, proposed draw \$6,110)

Established in 1939 “for needy churches in the diocese,” currently applied to the Mission Initiatives area.

A. E. Emery Camp Dennen Fund (DIT 7002O, proposed draw \$2,096)

Established by a bequest in 1976, currently used to provide a grant to the Barbara C. Harris Camp and Conference Center, cost center 3921.

Harriet G. Averill Fund (DIT 7002L, proposed draw \$1,873)

Established by a bequest in 1976, for equal sized grants to American Indian Missions and to the United Thank Offering. The current application supports a grant to the Native American Lillian Vallely School in Idaho, cost center 3952.

Caroline C. Haskett Fund (draw 7002R, proposed draw \$95)

A small fund established in 1978, identified for support of Church Home Society and orphan children. Given the size of the draw, it is implicitly used for basic infrastructure support for the Church Home Society operations.

Jessie B. Cox Fund (DIT 7003A, proposed draw \$36,924)

Established in 1980, this draw supports recently ordained clergy in training under the supervision of an experienced clergy person. The current application supports the clericus program in cost center 3411.

William V. Tripp Jr. Memorial Fund (DIT 7003B, proposed draw \$47,293)

Established in 1987 to support the position of diocesan youth minister, cost center 3011.

C.L.T. Lee / B. Wong Fund (DIT 7002D, proposed draw \$5,378)

Established in 1988 to support ministry among Asian Americans, cost center 3311.

Designation of Gifts and Bequests for Parishes

Abby Jackson Fund (DIT 8000W, proposed draw \$3,439)

Established in 1939 to support grants to Christ Church, Plymouth, included in cost center 2014.

Amelia Grant Schwarz Fund (DIT 7002W, proposed draw \$22,171)

Established in 1947 to provide an annual grant for the housing costs of the rector of St. John's, Sharon, included in cost center 2014.

Designation of Gifts and Bequests for the Bishop

Maurine C. Coburn Trust (DIT 7003D, proposed draw \$7,983)

Established in 1987 for assistance of clergy at the discretion of the bishop, included in cost center 4011.

Bishop's Entertainment Fund (DIT 8000X, proposed draw \$7,381, plus 16,000 shares Proctor & Gamble, projected \$42,400 in dividend income)

Both the DIT fund and the share holdings are related to a single gift in 1969 for the bishop to provide hospitality for clergy and visitors. In recent years this income has subsidized the annual clergy conference.

Frederick A. Reeve Fund (DIT 8000T, proposed draw \$10,307)

Established in 1991 for use by the bishop, included in cost center 4011.

Reserve Accounts (Fidelity Short Term Bond, draw as needed)

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 a Fidelity short term bond 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, 2019, this fund had a balance of \$2,067,478. In addition, there are pending proceeds from property disposition totaling \$1,750,000, and cash reserves totaling \$4,878,661 as of June 30, 2019.

Appendix A
Agency Endowment Funds

	Name	June 30, 2019 Balance
D7002X	GENERAL ENDOWMENT FUND	2,981,899
D7002C	JOHN B COBURN ENDOWMENT FUND	1,542,717
D7002D	C.L.T. LEE / B. WONG FUND	141,057
D7002E	AFRICAN SCHOLARSHIP FUND	320,922
D7002G	ENDOWMENT FOR MAINTENANCE	248,019
D7002J	AIM / HOSPITAL MINISTRY	704,546
D7002L	HARRIET G AVERILL FUND	49,124
D7002M	D A F BISHOP NASH FUND	254,511
D7002N	CLERGY SALARY FUND	934,636
D7002O	A E EMERY CAMP DENNEN FUND	54,972
D7002P	FREDRICK C LAWRENCE/RHINELANDER FUND	311,923
D7002R	CAROLINE C HASKETT FUND	2,486
D7002S	ADELAIDE R HARRIS FUND	6,231
D7002T	THE ELIZA GRAY CASE TRS P E C	3,797,619
D7002U	CAMPUS MINISTRIES FUND	294,025
D7002W	AMELIA GRANT SCHWARZ FUND	564,279
D7002Y	HOUSE OF MERCY FUND	879,518
D7002Z	ENDOWMENT FUND - ROSLINDALE	110,948
D7003A	THE JESSIE B COX FUND	968,545
D7003B	WILLIAM V. TRIPP JR. MEMORIAL FUND	1,240,525
D7003C	AIM CHRISTIAN WITNESS IN EDUC	1,171,357
D7003D	MAURINE C COBURN TRUST	209,410
D7003E	YOUTH ON MISSION	222,008
D7003F	AIM WILLIAM COOLIDGE ENDOWMENT FD	4,621,777
D7003R	W. CHISOLM FUND	114,742
D7004E	SEMINARIAN EDUCATIONAL ENDOWMENT	1,555,806
D7004H	DEAF MINISTRY ENDOWMENT	763,346
D7004I	FUND FOR CONGREGATIONAL VITALITY	4,925,254
D8000T	FREDERICK A REEVE FUND	270,369
D8000V	THOMAS M COFFIN FUND	160,267
D8000W	A. JACKSON FUND	90,214
D8000X	BISHOPS ENTERTAINMENT	193,619
	TOTAL	29,706,669

Appendix B
Trust Endowment Funds

	Name	June 30, 2019 Balance
D1140I	NORDEN MEMORIAL FUND	45,989
D1150B	ST. PAUL'S CHURCH REVERE (NEW)	25,020
D1175A	JOEL FOOTE BINGHAM FUND	134,527
D1175B	BLANCHE MARCY FUND	255,462
D2110A	SARAH A MCALLISTER FUND	3,952
D2110B	G & S TURNER MEMORIAL FUND	16,567
D2130A	SARAH T WEAVER FUND II	181,376
D4065A	ST MATTHEWS ENDOWMENT FD	181,217
D4065B	SAMUEL & EMMA DOWNING FD	9,550
D4065C	JOSEPH C STOREY FUND	105,164
D4065D	MARY A WILSON FUND	55,382
D4065E	A SMITH FUND FOR RECTORY MAINTENANCE	80,217
D4065G	MARTHA TERRY FUND	336
D5015A	AE GOVE MEMORIAL FUND	30,991
D5015C	FRANK H. BURNETT FUND	65,095
D7000A	DIOCESAN ENDOWMENT FUND	5,544,115
D7000B	VOTE OF CORP DIOCESAN FUND - VOC	2,202,921
D7000D	FAY DONATION I	287,643
D7000G	BENJAMIN LEEDS FUND - VOC	5,905,305
D7000I	CHURCHES AND CHAPELS FUND - VOC	106,648
D7001E	APPLETON FUND	59,695
D7001F	BISHOP'S FUND	1,400,565
D7001G	BISHOP OF MA SALARY FUND	176,344
D7001H	BISHOPS HOUSE FUND	289,468
D7001I	SUFFRAGAN BISHOPS FUND	1,133,468
D7001J	CAMILLA DAVENPORT FUND	44,397
D7001K	CORNELIA A FRENCH FUND	992,522
D7001L	KATHERINE FRENCH FUND	206,286
D7001O	ETHEL A CLARK FUND	1,359,581
D7001Q	MARY K D BABCOCK FD I	315,824
D7001R	MARY K D BABCOCK FD II	39,417
D7001S	JULIA K DAVEY FUND	98,152
D7001T	WILLIAM C WINSLOW FUND - VOC	14,382
D7001W	WK OF MERCY HARVISON FUND	53,110
D7001X	AMY YEAMES FUND	63,721
D7001Y	EDITH MUNRO FUND	27,830
D7002Q	AC BULLARD FD STUDENTS	267,798
D7003X	PATTON MEMORIAL FUND	1,448,055
D7004B	PATTON FUND FOR MAINTENANCE	119,425
D7004C	KATHERINE M. FOSTER TRUST	252,036
D7004D	FRANK H. BURNETT FUND	52,176
D8050B	KATHERINE K ABBOTT FUND	149,487
D9000Z	ABBY BROWN TRUST - VOC	209,115
D9001B	EDMUND F SLAFTER FUND II	261,899
	TOTAL	24,272,229

Appendix C
Bishop Directed Endowment Funds

Name	June 30, 2019 Balance	
UNRESTRICTED		
D8000B	BISHOPS UNREST. DISCRETIONARY FUND	4,036,796
D8000D	MARIA A APPLETON DODGE FUND	1,776,337
D8000G	MARGARET KIMBALL FUND	71,054
D8000J	THOMAS NELSON MEMORIAL FUND	24,640
D8000K	S & F ROWE FUND	24,747
D8000L	VALENTINE SLATERY FUND	22,200
D8000P	AMELIA WORTHINGTON FUND II	676,678
D8000U	H.S. HOWE FUND	1,499,723
D9000M	SARAH H A BURNHAM FUND	1,864,049
D9000N	THERESA COOLIDGE FUND	125,933
D9000Q	ELIZA S HATFIELD FUND - VOC	1,380,693
D9000S	FRANCIS S PARKER FUND	758,296
D9000U	AGNES WINSLOW RILEY FUND	384,099
D9000V	SARAH L SLATTERY FUND	135,455
D9000X	FRANCES L WHITTEMORE FUND	159,375
D9000Y	ROBERT E TOWNSEND TRUST - VOC	93,783
		13,033,859
RESTRICTED		
D7001C	PERCIVAL L & JULIA A POWELL	368,753
D8000A	MONKS/STEVENS/PITTMAN	772,959
D8000C	ANNIE O BALDWIN FUND II	16,913
D8000E	PAULINE CONY DROWN FUND	62,256
D8000F	HILL FUND	323,562
D8000H	LAURA R LITTLE MEMORIAL FUND	61,538
D8000I	EDWARD F MCINTIRE FUND	18,375
D8000M	PATIENCE H SLOANE FUND	244,308
D8000N	GEORGE AUGUSTUS STRONG MEM FUND	39,302
D8000O	AMELIA WORTHINGTON FUND I	468,536
D8000Q	SHERBONDY FUND	4,715
D8000R	THE DILL FUND	90,623
D8000S	ANNA MUIRSON JOHNSON BELLAMY FD	31,364
D9000L	EAST CAMBRIDGE FUND - ASCENSION	93,370
D9000O	FAY DONATION II	287,643
D9000P	WILLIAM A GATCHELL FUND	913,087
D9000T	SWANSEA RESTHOUSE FUND	3,073,124
D9000W	C HARRISON SOWDON FUND - VOC	104,733
		6,975,162

APPENDIX D: GRANTS TO CONGREGATIONS IN 2018

Grants to Congregations in 2018

Congregational Development Open Grants			\$110,000
Congregation	City	Ministry	Grant Amount
All Saints' Church	Attleboro	Keeping Our Doors Open for One Family, Cub and Boy Scouts, and Al-Anon	6,500
BC, MIT, Northeastern Chaplaincies	Boston; Cambridge	Path of Life Spiritual Formation Program	7,000
<i>common cathedral</i>	Boston	Ecclesia crosses	6,010
St. Stephen's Church	Boston	Building Connections and Opening Doors	2,765
All Saints Church of the North Shore	Danvers	St. Francis Meditation and Pet Memorial Garden	8,500
St. Mary's Church	Dorchester	Evangelismo: Old-School & Digital!	5,260
Church of the Holy Spirit	Fall River	off-site signage and promotional material for evangelism	1,200
Trinity Church	Haverhill	Sing a New Church - Second Verse	8,000
St. Anne's Church	Lowell	Youth Alive	8,500
St. John's Church	Lowell	KALEIDOSCOPE	8,500
Christ Church	Needham	Simple Sunday Evening Worship	6,000
St. John's Church	Saugus	A House of Prayer for All People	8,500
Church of Our Saviour	Somerset	Joint Parish Retreat	5,000
Christ Church	Swansea	Zacchaeus Project	5,650
Christ Church	Waltham	sound system	8,500
St. Peter's Church	Weston	Parish Visibility and Growth Program	6,600
Parish of the Epiphany	Winchester	Training for Stephen Ministry Leaders	7,515
			110,000
Congregational Development Targeted Grants			\$60,000
Congregation	City	Ministry	Grant Amount
multiple parishes		Episcopal Church Foundation Strategic Thinking Pilot Program	7,450
All Saints' Church	Attleboro	Automated External Defibrillator	3,808
Trinity Church	Bridgewater	full-time rector salary	4,800
Grace Church	Everett	Haitian Ministry	2,500
St. John's Church	Holbrook	St. John's Afterschool Program	10,000
			28,558
House of Mercy Grants			\$32,017
Congregation	City	Ministry	Grant Amount
Alewife Deanery			
St. Paul's Church	Bedford	Dignity Matters	732.69
St. James's Church	Cambridge	Cambridge Interfaith Sanctuary Coalition	1,282.69
Christ Church	Waltham	Diaper Depot	832.69
Church of the Good Shepherd	Watertown	The EVA House	542.69
Boston Harbor Deanery			
Church of the Advent	Boston	Tuesday Community Supper	1,000
Emmanuel Church	Boston	BostonWarm	730.77
St. Stephen's Church	Boston	Parent Engagement & Leadership Development Program	1,660
Cape & Islands Deanery			
St. David's Church	South Yarmouth	Amazing Grace of Cape Cod	3,390.77
Charles River Deanery			
Christ Church	Needham	Circle of Hope Welcome Baby Program	1,865.38
Grace Church	Newton	Newton-Brookline Asylum Resettlement Committee	1,525.38
Concord River Deanery			
St. Michael's Church	Holliston	Loaves and Fishes	1,500
Merrimack Valley Deanery			
Trinity Church	Haverhill	Academy of Creative Arts at Trinity	1,070
Grace Church	Lawrence	Basketball Program	358.56
St. John's Church	Lowell	KALEIDOSCOPE	1,070
St. Paul's Church	Newburyport	Food Voucher Program	892.21
Mt. Hope/Buzzards Bay Deanery			
St. Andrew's Church	New Bedford	Physical Education for Elementary School Children	3,390.77
Neponset River Deanery			
Church of the Advent	Medfield	Small Comforts	3,390.77
North Shore Deanery			
All Saints Church of the North Shore	Danvers	Navajoland Area Mission Women's Wellness Center	1,695.39
St. Stephen's Memorial Church	Lynn	Strengthening Women and Families	1,695.39
Taunton River Deanery			
Trinity Church	Bridgewater	Mercy Street: An Addiction Ministry	3,390.77
			32,016.92

Sending Serving Grants			\$48,000
Congregation	City	Ministry	Grant Amount
Alewife Deanery			
St. John's Church	Arlington	NEAT Community Dinners	606.25
St. Paul's Church	Bedford	Appalachia Service Project 2018 Mission Trip	506.25
St. Mark's Church	Burlington	Pumpkin Patch	506.25
Christ Church	Cambridge	The Outdoor Church	256.25
St. Bartholomew's Church	Cambridge	Wednesday Evening Community Meal	656.25
St. James's Church	Cambridge	Helping Hand Food Pantry	856.25
St. Peter's Church	Cambridge	CommonCare Meals Ministry	656.25
St. James's Church	Somerville	ESL Program	300
Christ Church	Waltham	Grandma's Pantry	606.25
Church of the Good Shepherd	Watertown	Vacation Garden School	456.25
Boston Harbor Deanery			
Emmanuel Church	Boston	BostonWarm	3,415.86
St. Stephen's Church	Boston	Teen Leadership Dev./Community Organizing; Parent Engagement/Leadership Dev.	2,146.63
Charles River Deanery			
Parish of St. Paul	Newton Highlands	Newton Sanctuary & Solidarity Collaborative	5,562.50
Concord River Deanery			
St. Mark's Church	Southborough	St. Mark's Church Summer Youth Mission with Youth Works	5,562.50
Merrimack Valley Deanery			
Trinity Church	Haverhill	Dinah's House; Academy of Creative Arts at Trinity	1,659.42
Grace Church	Lawrence	Basketball Program	1,718.65
St. Anne's Church	Lowell	Youth Alive	1,802.21
St. John's Church	Lowell	KALEIDOSCOPE	382.21
Mt. Hope/Buzzards Bay Deanery			
Grace Church	New Bedford	Ecuadorian Pilgrimage	5,562.50
Neponset River Deanery			
St. Michael's Church	Milton	Safe Passage, Guatemala City, Guatemala	2,500
Emmanuel Church	West Roxbury	Youth on Fire and The Community Day Center	1,000
North Shore Deanery			
St. Peter's Church	Beverly	St. Peter's Outreach Meals	2,531.25
St. Stephen's Memorial Church	Lynn	Summer Learning at St. Stephen's	3,031.25
Taunton River Deanery			
All Saints' Church	Attleboro	One Family, A Mission of Unity	5,562.50
			47,843.73
Case Trust/Bristol County Fund			\$136,477
Congregation	City	Ministry	Grant Amount
South Coast Mission Hub		Grass Roots Initiative; Mount Hope at Kennedy Park; Project Discovery, Discover More	18,300
All Saints' Church	Attleboro	One Family, Cub and Boy Scouts, and Al-Anon: Keeping Our Doors Open	8,000
Church of the Holy Spirit	Fall River	Family Advent Extravaganza; Family Fun Day; Senior Fellowship	9,300
St. Luke's Church	Fall River	Urban Youth Education and Empowerment Program	10,000
Grace Church	New Bedford	Community Breakfast Program; Laundry Love	5,500
St. Andrew's Church	New Bedford	Spirit of Grace for All, an Ecumenical Ministry; St. Andrew's Out of School Programs	22,600
St. Martin's Church	New Bedford	Children's Outreach Event; Senior Lunch Program	4,000
Grace Church	North Attleborough	Program to Support the Young Leaders Fellowship	6,000
Bristol Trinity Episcopal Church	North Easton	Flow Satchels; Kids Care Program; Laundry Love; Taunton Area Community Table	22,600
Church of Our Saviour	Somerset	Annelle Delorme-Hagerman Food Pantry; Bienvenido a Fall River	5,000
Christ Church	Swansea	Campers to Christ; Soup N Senior Social	10,800
St. Thomas's Church	Taunton	Mission Trip to Cuba	2,000
			124,100
Special Needs Ministries Grants			\$8,000
Congregation	City	Ministry	Grant Amount
All Saints' Church	Attleboro	Making a Joyful Sound, Part II	1,002
St. Andrew's Church	New Bedford	Sunday School for children with special needs and their friends	2,000
			3,002
African Ministries Grants			\$20,000
Congregation	City	Ministry	Grant Amount
Grace Chapel	Brockton		5,000
Christ Church	Hyde Park		5,000
St. Stephen's Memorial Church	Lynn		5,000
Anglican Congregation of St. Peter	Waltham		5,000
			20,000

Hispanic Ministries Grants			\$25,000
Congregation	City	Ministry	Grant Amount
St. Luke's/San Lucas Church	Chelsea	Spanish and Bilingual Music Program	5,166.80
St. Mary's Church	Dorchester	Santa Maria Pa'lante	4,332.80
Grace Church	Lawrence	Music Program	5,166.80
St. Anne's Church	Lowell	Music Program Latino Congregation	5,166.80
St. Peter's/San Pedro Church	Salem	Music Ministry	5,166.80
			25,000

Mission Tithe Matching Grants			
Congregation	City	Pilgrimage or Mission Partner Location	Grant Amount
St. Paul's Church	Bedford	Léogâne, Haiti	7,000
St. John's Church	Beverly Farms	Syria	7,000
St. Stephen's Church	Boston	Marshall, North Carolina	5,000
Trinity Church	Canton	Chamhawi, Tanzania	10,000
St. Stephen's Church	Cohasset	Minnesota	7,500
St. Paul's Church	Dedham	Santiago, Spain	10,000
St. Dunstan's Church	Dover	Labegue, Haiti	7,000
St. John's Church	Gloucester	Navajoland	7,000
Church of Our Redeemer	Lexington	Navajoland	6,000
St. Andrew's Church	Methuen	Nghumbi, Tanzania	10,000
St. Michael's Church	Milton	Guatemala City	5,000
St. Paul's Church	Nantucket	Vertientes, Cuba	10,000
Christ Church	Needham	Lazile, Haiti	4,990
St. Andrew's Church	New Bedford	Magila, Tanzania	10,000
Church of the Good Shepherd	Reading	local (refugee resettlement)	10,000
Christ Church of Hamilton & Wenham	South Hamilton	Saint Louis d'Aiti, Haiti	10,000
			126,490

Continuing Education Grants			\$10,000
Clergy person	Congregation	Program	Grant Amount
The Rev. E. Tom Barrington	St. Stephen's, Lynn	Fundamentals of Transition Ministry	500
The Rev. Rebecca Blair	St. Andrew's, New Bedford	Interim Ministry Training	500
The Rev. Gareth Evans	Good Shepherd, Acton	Deep Calls to Deep residency: Preaching in the Jesus Movement	500
The Rev. Thomas Ferguson	St. John's, Sandwich	research trip to Ireland	500
The Rev. Billie Mae Gordon	Trinity, Wrentham	Fundamentals of Transition Ministry	500
The Rev. Jane Gould		Thresholds: Navigating the Difficult Transitions of Life	500
The Rev. Peter Jeffrey	Good Shepherd, Reading	Education for Ministry	375
The Rev. Philip LaBelle	St. Mark's, Southborough	Writing for Your Life Spiritual Writers' Conference	500
The Rev. Jean Baptiste Ntagengwa	diocesan staff	World Relief immigration law training	500
			4,375

Sabbatical Funds			\$26,645
Congregation	City		Grant Amount
St. Mary's Church	Barnstable		5,000
Emmanuel Church	Boston		5,000
St. Stephen's Church	Boston		5,000
Grace Church	New Bedford		5,000
Parish of St. Chrysostom	Quincy		5,000
			25,000

Bishops' Funds			
Clergy Children College Scholarships		14 students	31,500
Society for the Relief of Aged or Disabled Clergy		Served 34 clergy	109,963
Society for the Relief of Widows, Widowers and Orphans of Clergy		Served 32 widows	64,900

APPENDIX E: TOGETHER NOW CAMPAIGN

The Together Now campaign, launched in 2011, is coming to a successful close. We celebrate that nearly 4,000 pledges totaling \$32 million were received for congregations, projects and programs throughout the diocese.

As of June 30, 2019, there are outstanding pledges of \$1,231,374.80, and the diocese will continue to receive payments on those pledges. Disbursements to congregations will continue as warranted by pledge payments. The use of Together Now funds has not changed. A full accounting of the Together Now campaign will be available when collections are complete.

APPENDIX F: DIOCESAN STAFF
Listed by Area, as of October 2019

Resources for Congregations

<i>Ordained Vocations</i>	Edie Dolnikowski, Canon for Ordained Vocations Patricia Zifcak, Assistant for Ordained Vocations (<i>part-time</i>)
<i>Regional Canons</i>	Carol J. Gallagher, Regional Canon, Central Region Martha L. Hubbard, Regional Canon, Northern & Western Region Kelly A. O’Connell, Regional Canon, Southern Region Jennifer Garrett, Assistant for Congregational Resources & Events
<i>Networking & Formation</i>	Martha Shaughnessey Gardner, Missioner for Networking & Formation
<i>Multicultural Ministries</i>	Jean Baptiste Ntagengwa, Canon for Immigration & Multicultural Ministries
<i>Youth Ministry</i>	H. Mark Smith, Youth Missioner
<i>Communications</i>	Tracy J. Sukraw, Director of Communications Bridget K. Wood, Communications Assistant
<i>Grants</i>	Lauren Zook, Grants Administrator (<i>full-time, divided between budget areas</i>)
<i>Records & Societies</i>	Suzette Phillips, Assistant for Clergy Records and Retired Clergy & Survivors (<i>part-time</i>)

Episcopate and Governance

<i>Bishop Diocesan</i>	Alan M. Gates, Bishop Diocesan Laura Simons, Executive Assistant to the Bishop Diocesan
<i>Bishop Suffragan</i>	Gayle E. Harris, Bishop Suffragan David Ames, Executive Assistant to the Bishop Suffragan
<i>Canon to the Ordinary</i>	William C. Parnell, Canon to the Ordinary Chelsea Smith, Assistant for Governance and Administration
<i>Development</i>	Bliss Austin Spooner, Director of Development Lauren Zook, Development Assistant (<i>full-time, divided between budget areas</i>)

Facilities and Administration

<i>Finance</i>	Gerry Sullivan, Chief Business Officer Tom Hamel, Controller Marilyn Govoni, Accountant Trish Superville, Accountant
<i>Human Resources</i>	Nathaniel Fasman, Payroll and Benefits Manager
<i>Information Technology</i>	Jamie Reamer, Information Technology Manager
<i>Remote Facilities</i>	Jaime Perez, Sexton
<i>Archives</i>	<i>Vacant</i> , Archivist

Mission Initiatives Employees

Life Together Kelsey Rice Bogdan, Executive Director
Lindsey Hepler, Associate Director of Training and Recruitment
Gerald Ellis, Operations

Aided Congregations Timothy Crellin, Vicar, St. Stephen's Church, Boston
Lily Leung, Administrative Assistant, Boston Chinese Ministry

Chaplaincies Megan Holding, Chaplain, Northeastern University &
Boston College
Thea Keith-Lucas, Chaplain, MIT

Together Now Campaign Continuing Positions

Mission Hubs Dorothea Littlepage, Executive Director, Roxbury-Dorchester
Mission Hub

Mission Institute Vacant, Executive Director, Mission Institute

Non-Stipendiary Program Coordinators

Deacons Christiaan A. Beukman, Archdeacon
Patricia Zifcak, Archdeacon

Elder Care Phillip Flaherty, Missioner for Ministry with Older Adults
Marilee Comerford, RN, Assistant Missioner for Ministry with
Older Adults

Global Partnerships Holly Hartman, Deacon for Global Mission
Marilyn McMillan, Deacon for Global Mission

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