

Proposed 2011 Diocesan Budget

The 225th Annual Convention of the Episcopal Diocese of Massachusetts
St. Stephen's Memorial Church, Lynn
November 6, 2010



Statement of Mission

As members of the Episcopal Diocese of Massachusetts we believe God in Christ is working everywhere in the world to heal, to reconcile, to love every person and all of creation into wholeness. Through the life, cross and resurrection of our Lord Jesus Christ, the power of sin and death has been broken; life and hope is the new reality.

It is our mission to join in God's transforming mission. We will form our children, our young people and our adult members, through prayer, worship and Scripture, to become followers of Christ, that we might discern where God is carrying out this mission in our world. And we will send our people to serve with Christ, inviting everyone and all of creation to share in the just reign of God.

Prayer for Mission

O gracious and loving God, you work everywhere reconciling, loving and healing your people and creation. In your Son and through the power of your Holy Spirit, you invite each of us to join you in your work. We, young and old, lay and ordained, ask you to form us more and more in your image and likeness, through our prayer and worship of you and through the study of your Scripture, that our eyes will be fully opened to your mission in the world. Then, God, into our communities, our nation and the world, send us to serve with Christ, taking risks to give life and hope to all people and all of your creation. We ask this in Jesus' name. Amen.

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The Episcopal Diocese of Massachusetts

Dear Colleagues in the Ministry of Jesus Christ,

How are we as a diocese, as a community of interconnected congregations, chaplaincies and ministries, answering God's urgent call to mission?

Diocesan resources are collective resources, given and shared with one another through diocesan structures for joining God's mission together, often in order to do what individual congregations and ministries can't accomplish on their own. Our mission strategy is a means for focusing and deploying those resources effectively for growth. The budget creation process continually challenged us to consider how our budget priorities and decisions are consistent with and reflect our diocesan mission strategy and how they support congregations and ministries in their responses to God's urgent call.

We believe we are answering that call together through a mission strategy that commits us to ministry with children, youth and young adults; to strategic efforts in and among city, ethnic and multicultural communities where there is both great need and great potential; and programs and resources that support vital and viable congregations and the ministries of all baptized people offering their time, talent and treasure.

Throughout our diocese there are signs of growth and new life, of people leaning on and longing for the Gospel. We believe we are witnessing a new awakening and call to the church to see its mission field right outside its doors, to reach out in new ways to seekers and those we are called to seek out. We also experience and hear of people's struggles and despair in these uncertain economic times. During such times it is tempting to respond fearfully. During such times, as Christians, we are called to a different kind of response, one of hope. So even though this budget is leaner than last year's and asks us to be ever-more responsible and thankful in our stewardship of the gifts we've been given, we are with hope sticking to our mission priorities, and we remain strongly committed to the ministries, programs and services that we believe we are called to for the sake of the world, God's creation and God's kingdom on earth.

We all offer our great gratitude to our diocesan treasurer, and to the Budget Committee, Diocesan Council, staff and ministry leadership for their contributions to this important work. I commend it now to the delegates and clergy members of Diocesan Convention for prayerful consideration and action.

In Christ's Peace and Love,

The Rt. Rev. Bud Cederholm

Diocesan Core Operating Budget Summary

This is the proposed 2011 Diocesan Core Operating Budget which is to be placed before the Diocesan Convention on November 6, 2010, for consideration and vote.

2011 CORE BUDGET SUMMARY	
Assessments	5,028,653
Congregational Contributions	36,000
Assessment Reserves	-128,653
Net from Congregations	4,936,000
Spending Policy – Endowments	661,090
Spending Policy – Trust Funds	655,727
Interest Income	44,395
Net from Investments	1,361,212
TOTAL REVENUE:	6,297,212
Deaneries, Congregations and Clergy	704,214
Congregational Resources and Training	1,029,161
Strategic Ministries	1,257,281
Episcopal and Diocesan Support	2,299,175
Administrative Services	992,138
Reserves	15,243
TOTAL EXPENSES:	6,297,212

Budget Overview

This proposed 2011 budget presents, in narrative and tables, a picture of our diocesan mission strategy in action. That strategy for joining God's mission as an inviting, forming, sending, serving diocese was adopted in 2003 and has been updated in 2006 and 2009 to reflect the diocese's evolving ministries. Although the 2011 budget is essentially flat, down 2 percent (\$120,106) from 2010, the Budget Committee and Diocesan Council, along with the Treasurer's Office and diocesan staff, nonetheless have listened carefully to input from deaneries while keeping an eye on the big picture of diocesan life.

The proposed 2011 budget is balanced. It is close to 20 percent (\$1,239,288) less than the 2008 budget, and about 9.5 percent less than the 2009 budget. As Bishop Cederholm writes in his letter on page 5, despite the fact that income and spending are reduced, this budget focuses its support so that the overall ministry of the congregations and strategic ministries can continue to thrive.

Notable increases in the proposed 2011 budget are:

- Staff compensation and benefits
- Hispanic ministries in Lawrence and Salem
- Youth ministry
- Massachusetts Council of Churches pledge
- Communications
- Congregational Development Grants
- Administrative support
- Boston University chaplain
- Title IV implementation
- Legal services
- Clergy Conference

Notable decreases are:

- St. Paul's Church, Brockton
- Expense budgets, particularly for diocesan leadership team
- The Episcopal Church Ask
- Chinese Ministry
- Congregational Resources and Training program funds and events

Process

The Budget Committee held six open hearings in the spring, five of which were regional meetings about all aspects of the diocese's finances and budget, and the sixth was an opportunity for the leaders of Strategic Ministries to address the Budget Committee. More than 200 people attended these meetings in total. The hearings provided a good opportunity to review the recently adopted diocesan mission strategy and to go into detail about diocesan finances, both expenses and revenues. Some of the topics that came up repeatedly and which helped shape the drafting of the budget were: a desire

for more transparency and more detailed information regarding diocesan finances; continuing demand for program support that will directly aid in the strengthening of congregations; wide recognition and desire to work collaboratively among congregations through a variety of channels; and urgent anticipation to know more about diocesan-led initiatives, particularly those related to communications and Strategic Ministries.

The bishops' priorities also informed the budget process. These included an increase in staff compensation; additional staffing to help coordinate Strategic Ministries programs, particularly those directly responsive to mission strategy; additional support for diocesan communications initiatives; the environment; grants to congregations; immigrant and urban ministries; support for church collaborations; and a canon for congregations.

Economic and Financial Environment and Impact on Congregations

The economy continues to be weak and strains our congregations. Since the 2011 assessments are pegged to the 2008 operating expenses, before congregations had the chance to adjust to the economic downturn, the assessment levels may seem burdensome today. Fortunately, the financial market recovery has helped diocesan portfolios, so the projected reduction in spending policy income is less than might have been anticipated a year or so ago.

Looking ahead at the 2009 parochial reports (not all of which have been received) and the implied assessment revenue available in 2012 under the existing formula, it is unlikely that the assessment revenue in 2012 will be greater than that available in 2011.

It was not possible to realize all of the bishops' priorities, particularly around staffing. This budget favors diocesan activities that return resources to congregations, such as Congregational Development Grants, and other measures that keep assessment levels affordable. (See Appendix 1 for tables detailing grants to congregations in 2009.)

Core and Supplemental Budgets

Starting with the 2009 budget, we have made a distinction between the core budget, funded by assessments and normal spending policy income from endowments, trusts and investments, and the supplemental budget, funded by development efforts, bishop's discretionary fund grants and extraordinary draws on the unrestricted endowments.

The 2009 Convention budget book described the rationale for this distinction:

By separating the overall diocesan budget into core and supplemental pieces, we can identify those programs and activities that are either temporary, experimental or otherwise dependent on funding sources other than assessments and investment income. [page 8]

Over the past two years the implementation of the core and supplemental budgets has taken time, as it has involved a number of different policies and practices at all levels. The administrative support for this, and the reorganized structure of all diocesan operations, has required an overhaul of the management accounting and reporting systems. As a result, the 2009 and 2010 budget proposals were able to disclose the bulk of the supplemental funding and spending, but in a less complete and precise manner than expected under normal circumstances.

The experience of the past two years confirms two things. First, the distinction between core and supplemental has indeed been helpful in terms of bringing some order and structure to the entire diocesan financial picture, and it has been a useful concept to guide the development of new control systems and a new chart of accounts.

Second, because of their less certain funding, the programs in the supplemental budget should receive as much or even more scrutiny as those in the core budget. This is being achieved through the gains we are making in updating our control systems, along with a better informed Diocesan Council taking appropriate oversight responsibility.

Projected Revenue for 2011

Assessments and Adjustments and Reserves

The 2011 assessment formula maintains the same structure as the 2010 formula:

$$\text{assessment due} = 15.5\% * \text{BASE} - \$6,000 \text{ (subject to a floor of 0)}$$

where the BASE for 2011 is equal to line 14 (“all other operating expenses”) from the 2008 parochial report, less line 7 (“assistance from diocese”).

For a mission, the 2011 assessment is two-thirds the amount that would be assessed if the congregation were a parish.

The assessment formula passed by the Diocesan Council in spring 2010 together with the parochial report data for 2008 generates a gross assessment for 2011 of \$5,238,485. However, at the same time, the council also created an assessment adjustment committee to consider adjustments on a parish-by-parish basis according to the particular circumstances. The Diocesan Council ratified the committee’s work and approved adjustments for 24 parishes totaling \$209,832, bringing the net assessment billings for 2011 down to \$5,028,653. Furthermore, to provide a reserve against assessments not paid in 2011, the budget sets aside \$128,653. This sets the revenue available to the budget from assessments at \$4,900,000, plus \$36,000 additional revenue from projected voluntary contributions from congregations, for a total revenue from congregations of \$4,936,000.

Net Revenue from Investments

Not all revenue for the core budget comes through payments from congregations. Almost 22 percent comes in the form of spending policy draws from investments, either owned directly by the diocese (including our endowment funds), or owned by others (usually the Trustees of Donations) in trust for the benefit of the diocese.

Some funds, whether owned by the diocese or by a trust, place no restriction on the diocese regarding the use of the income provided through the spending policy draws. The unrestricted funds represent about 25 percent of the available spending policy income. The remaining funds have some restriction on the use of the spending policy 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.

Spending Policy – Trusts (see Appendix 2)

The appendix table lists the trusts owned and managed by the Trustees of Donations for the benefit of the diocese. The trustees will distribute 4 percent of a lagged measure (12 trailing quarters) of market value for each fund. There are a few funds with restrictions that require the trustees to deviate from the general spending policy formula. In some cases, the distribution is limited to actual income produced by the fund, and in other cases, all income must be reinvested for the time being. The total spending policy income available in 2011 is about \$70,000 less than that available in 2010, due primarily to the lower market values recorded in 2008 and 2009.

Spending Policy – Endowments (see Appendix 3)

The appendix table lists the endowments owned by the diocese and managed by the Trustees of Donations. These include some funds that are unrestricted and others that have some restriction on their use; these restrictions may have been placed by a donor or by Diocesan Council.

The proposed spending policy for 2011 is similar to that adopted by the Trustees of Donations: an annual draw of 4 percent of a base that reflects the average of the market value over the past 12 quarters, adjusted for withdrawals from and additions to principal.

The total spending policy income available in 2011 is about \$70,000 less than that available in 2010, due in part to extraordinary withdrawals from the unrestricted endowment to fund the HVAC work in 2009 at the 138 Tremont Street office buildings and a higher spending policy draw required in 2010.

Investment Income

The inclusion of \$44,395 in interest income represents the income to be earned and collected from the mortgages extended to the two bishops suffragan.

Projected Expenses for 2011 by Areas of Operation

Diocesan operations are organized into five areas: Deaneries, Congregations and Clergy; Congregational Resources and Training; Strategic Ministries; Episcopal and Diocesan Support; and Administrative Services. The bishops and the canon to the ordinary are the leadership team with oversight for the diocesan operations.

Deaneries, Congregations and Clergy (see table on page 15)

Support for Deaneries: codes 1001, 1002, 1003

The deaneries are the official structure for organizing the congregations of the diocese into regional groups. The assembly of a deanery is responsible for electing its officers and its representatives to Diocesan Council, and for administering various diocesan grant programs. The core budget provides three types of ongoing support for the 12 deaneries: The parish of each dean receives a quarterly stipend of \$1,000 as recognition of the responsibilities assumed by the dean. The elected co-conveners of each deanery assembly can request reimbursement for deanery assembly expenses up to \$500 per year. There is \$500 per deanery reserved to help defray the costs of deanery Confirmations.

Transition Ministries: 1111

The transition ministries program provides stipends to coaches who work with parishes in transition. The proposed budget allocation for 2011 is \$9,000, the same as in 2010. In addition, there is \$5,000 allocated for the travel and other expenses of the canon for transition ministry and clergy deployment.

Commission on Ministry: 1311

The program costs for the Commission on Ministry are sensitive to the number of postulants and candidates in the process. The budget allocation for 2011 is \$56,000, the same as in 2010.

Diaconate Program: 1331

Acting on the request of the diocesan leadership team, the 2011 budget for the diaconate program is \$3,000 higher than in 2010, to provide stipends for the program leadership.

Seminarian Scholarships: 1213, 1312

Code 1213 is the newly moved cost center for the MSASA/African Scholarship fund, so that this fund can be administered by the officer for ordained vocations. The income available from this restricted endowment (fund 7002E) in 2011 is \$8,679.

Two restricted funds support the core budget allocation to the other cost center associated with seminarians. The seminarian educational endowment (fund 7004E) will provide \$42,169 of income in 2011. The A. C. Bullard fund (7002Q) will provide \$7,690 in income, with the restriction that the student at the Episcopal Divinity School who

receives it will be active in some way at Christ Church, Hyde Park. Not shown here in the core budget is the additional income for seminarian scholarships that the bishops provide through their parish visitations.

Support for Retired Clergy: 1231

The amount for program in this area is \$3,500. The cost center also includes two \$250 grants from the Benjamin Leeds fund (7000G) to the Society for the Relief of Aged or Disabled Clergy, and to the Society for the Relief of Widows, Widowers and Orphans of Clergy; these grants offset charges in the same amount to the two societies for accounting services provided by the diocese (and included in the fees earned by cost center 5011, the Treasurer's Office).

Clergy Events: 1321, 1341, 1411, 1421, 1431

There are separate cost centers provided for the Fresh Start program, the Clergy Family Network, a pre-Lenten retreat, the spring Clergy Conference and the fall Clergy Day. All except the Clergy Conference are budgeted at the same level as in 2010. The allocation for the net cost to the core budget of the Clergy Conference is \$35,000 in 2011, which is \$5,000 higher than budgeted in 2010.

Sabbaticals and Continuing Education: 1211, 1212

The 2010 core budget allocated \$16,000 and \$8,000 for the programs for sabbaticals and for continuing education. The 2011 budget allocates from the core budget \$6,888, which is the amount of the income to be received from the Bishop Nash fund (7002M), for the sabbatical program and \$0 for continuing education, with the expectation that these programs will receive supplemental funding from a grant from the bishop's discretionary funds to bring the total funding to 2010 levels.

Area Staff and Expenses: 1000

As shown in the staff table (see Appendix 5), this area has five staff positions within it, with a total compensation cost of \$437,288, plus \$5,000 allocated for area expenses.

DEANERIES, CONGREGATIONS AND CLERGY – CORE BUDGET 2011

CODE	ACTUAL 2009	BUDGET 2010	COST CENTER	BUDGET 2011	FEES	PROGRAM	GRANTS	STIPENDS	STAFF	1099	SUPPORT	SERVICES	TRANSFER
	863,551	830,700	TOTALS:	704,214	-55,500	201,500	500	113,426	437,288	0	22,000	0	-15,000
1000	531,748	483,000	Deaneries, Cong. & Clergy	442,288	0	0	0	0	0	0	5,000	0	0
1001	58,542	6,000	Deaneries	6,000	0	0	0	0	437,288	0	6,000	0	0
1002	0	48,000	Deans	48,000	0	0	0	48,000	0	0	0	0	0
1003	0	6,000	Deanery Confirmations	6,000	0	0	0	0	0	0	6,000	0	0
1021	42,668	0	Deaneries, Cong. & Clergy	0	0	0	0	0	0	0	0	0	0
1101	3,010	0	Congregations	0	0	0	0	0	0	0	0	0	0
1111	14,858	14,000	Transition Ministries	14,000	0	9,000	0	0	0	0	5,000	0	0
1201	763	0	Clergy	0	0	0	0	0	0	0	0	0	0
1211	24,545	16,000	Sabbaticals	6,888	0	0	0	6,888	0	0	0	0	0
1212	7,180	8,000	Continuing Education	0	0	0	0	0	0	0	0	0	0
1213	0	0	MSASA EDS	8,679	0	0	0	8,679	0	0	0	0	0
1231	1,486	4,000	Support for Retired Clergy	4,000	0	3,500	500	0	0	0	0	0	0
1311	50,291	56,000	Commission on Ministry	56,000	0	56,000	0	0	0	0	0	0	0
1312	45,535	45,200	Seminarians	49,859	0	0	0	49,859	0	0	0	0	0
1321	6,604	6,000	Fresh Start Program	6,000	0	6,000	0	0	0	0	0	0	0
1331	12,243	12,000	Diaconate Program	15,000	0	15,000	0	0	0	0	0	0	0
1341	2,500	2,500	Clergy Family Network	2,500	0	2,500	0	0	0	0	0	0	0
1411	-403	0	Pre Lenten Retreat	1,500	-4,000	5,500	0	0	0	0	0	0	0
1421	61,749	30,000	Clergy Conference	35,000	-50,000	100,000	0	0	0	0	0	0	-15,000
1431	232	0	Clergy Day	2,500	-1,500	4,000	0	0	0	0	0	0	0

Congregational Resources and Training (see table on page 17)

Grant Programs: codes 2011, 2012, 2013, 2015, 2021, 2022, 2031

The Congregational Resources and Training area administers seven grant programs. For three of the programs, all of the program funds come from the spending policy income from specific endowments:

- Bristol County Case Grants: \$104,052, from the Case Bristol County fund (7002T)
- Deaf Ministry Grants: \$37,168, from the Deaf Ministry Endowment (7004H)
- House of Mercy Grants: \$24,117, from the House of Mercy fund (7002Y)

The four other programs are funded through the unrestricted income:

- Congregational Development Grants, open: \$200,000, increased \$40,000 from 2010
- Congregational Development Grants, targeted: level funded at \$70,000
- Sending Serving Grants: level funded at \$48,000
- Hispanic Ministry Grants: level funded at \$25,000

Note that the decisions for the Sending Serving and the House of Mercy grants are currently made by the 12 deanery assemblies.

Spring Learning Event and Fall Resource Day: 2112, 2113

The Congregational Resources and Training area traditionally hosts two large events each year, a spring learning event and a fall resource day. In 2010 the spring learning event was held at the Cathedral Church of St. Paul, at a significant cost savings, and the 2011 budget anticipates that a similar cost savings will be achieved in 2011.

Workshops, Programs, Practice Areas, Resource Center & Other Support: 2000

The Congregational Resources and Training area is home to a number of different initiatives that may have different needs, requirements and priorities from year to year. The 2011 budget allocates \$40,000 for these programs, to be allocated by the director of the area and the diocesan leadership team. The reduction from the 2010 budget allocation of \$60,000 is offset by increases elsewhere in the area's budget.

Communications: 2311

A new plan and strategy for diocesan communications is well underway, and greater information about it will be presented over the next few months. In preparation for this, the 2011 budget allocates a total of \$150,000 to this initiative. With this allocation, there is no separate additional allocation for either the *FYI* or the *Episcopal Times* publications.

Area Staff and Expenses: 2000 (staff and support)

As shown in the staff table (see Appendix 5), this area has four staff positions within it, with a total compensation cost of \$359,824, plus \$8,000 allocated for area expenses. The total staff expense in the core budget is offset by a fee of \$52,000 to be paid through the funds from the closed churches, to reflect the staff time spent by the staff person coordinating the closing activities. The fee will be collected proportionately from the various closed church funds based on the relative time spent on each closing.

CONGREGATIONAL RESOURCES AND TRAINING – CORE BUDGET 2011

CODE	ACTUAL 2009	BUDGET 2010	COST CENTER	BUDGET 2011	FEES	PROGRAM	GRANTS	STIPENDS	STAFF	1099	SUPPORT	SERVICES	TRANSFER
	858,014	931,835	TOTALS:	1,029,161	-63,000	216,000	508,337	0	359,824	0	8,000	0	0
2000	388,121	383,000	CONG RESOURCES & TRAINING	407,824	0	40,000	0	0	359,824	0	8,000	0	0
2011	43,889	160,000	Cong Dev Open Grants	200,000	0	0	200,000	0	0	0	0	0	0
2012	151,120	70,000	Cong Dev Targeted Grants	70,000	0	0	70,000	0	0	0	0	0	0
2013	83,109	90,000	Bristol County Case Fund Grants	104,052	0	0	104,052	0	0	0	0	0	0
2015	0	0	Deaf Ministry Grants	37,168	0	0	37,168	0	0	0	0	0	0
2021	35,500	48,000	Sending Serving Grants	48,000	0	0	48,000	0	0	0	0	0	0
2022	40,730	30,000	House of Mercy Grants	24,117	0	0	24,117	0	0	0	0	0	0
2031	0	0	Hispanic Ministries	25,000	0	0	25,000	0	0	0	0	0	0
2111	6,474	0	CRT Events	0	-5,000	5,000	0	0	0	0	0	0	0
2112	13,343	12,000	Spring Learning Event	4,000	-2,000	6,000	0	0	0	0	0	0	0
2113	9,208	17,000	Resource Day	11,000	-4,000	15,000	0	0	0	0	0	0	0
2131	-183	15,300	CRT Workshops	0	0	0	0	0	0	0	0	0	0
2132	1,520	0	Anti-Racism	0	0	0	0	0	0	0	0	0	0
2133	6,372	0	Safe Church	0	0	0	0	0	0	0	0	0	0
2151	2,140	0	Resource Center	0	0	0	0	0	0	0	0	0	0
2161	3,615	0	Consultants and Coaches	0	0	0	0	0	0	0	0	0	0
2171	6,640	0	Practice Areas	0	0	0	0	0	0	0	0	0	0
2211	3,497	0	Congregation Support	0	0	0	0	0	0	0	0	0	0
2221	4,483	0	Program Support	0	0	0	0	0	0	0	0	0	0
2222	-335	0	Family Camp	0	0	0	0	0	0	0	0	0	0
2231	0	0	Committee Support	0	0	0	0	0	0	0	0	0	0
2311	49,250	20,000	Diocesan Communications	150,000	0	150,000	0	0	0	0	0	0	0
2312	14,760	15,000	FYI Newsletter	0	0	0	0	0	0	0	0	0	0
2313	1,059	71,535	Episcopal Times	0	0	0	0	0	0	0	0	0	0
2901	-6,299	0	Closed Congregations	-52,000	-52,000	0	0	0	0	0	0	0	0

Strategic Ministries (see table on page 20)

Youth Ministry: 3011

At the request of the diocesan leadership team, the allocation for the program and staff in youth ministry for 2011 is \$139,230, an increase of \$37,230 over 2010.

Life Together: 3056

The Life Together program, which is the new name for the combined Relational Evangelism and Micah Project programs, has just started its third year. (The program year runs from August to July.) During the second year, the total expenses and revenues for Life Together were approximately \$400,000, of which \$75,000 came from the 2010 core budget. The program has expanded this program year, with a projected expense budget of approximately \$500,000; the core budget contribution remains at \$75,000.

The Dorchester Partnership: 3331

The current commitments to the Dorchester Partnership in place now for the 2011 calendar year are as follows: \$126,600 proposed in this core budget; \$45,000 as the balance of a \$150,000 extraordinary commitment made by the Executive Committee of Diocesan Council in 2008, when the partnership was first developed; \$22,000 from a bishop's discretionary fund grant, pledged when the partnership was first developed; and, to help defray the compensation costs assumed by the diocese, \$32,000, equal to \$16,000 each, from St. Mary's and St. Mark's, representing a \$2,000 per month pledge made at the start of the partnership.

For the past two years, the core budget allocation to the Dorchester Partnership has included the revenue from the Jessie B. Cox endowment fund, known as the Cox Fellowship. This fund (7003A) will generate \$26,214 in 2011. Historically, the diocesan bishop has designated the Cox Fellow.

St. Paul's Church, Brockton: 3221

For much of the budget process, the working assumption was that the proposed 2011 budget would include some support for this ministry, but at a reduced level from 2010. The most recent developments indicate no core budget funding in 2011; instead, the mission will draw upon its existing funds to support the vicar. Additionally an African Ministries grant will provide for a priest to help sustain ministry in Brockton until a long-term strategy is developed.

Campus Ministries: 3111, 3121, 3131, 3136, 3141

The proposed core budget provides for two full-time chaplains, one half-time chaplain and one half-year intern (at Boston University), plus \$24,000 in program support equally allocated across the four campuses (BC, BU, MIT and Northeastern).

Continuing Grants for Congregations: 3231, 3241, 3251, 3311

The proposed core budget maintains level funding for grants that help pay for clergy at the following congregations:

- St. Luke's/San Lucas, Chelsea (\$66,000)
- Christ Church and Iglesia de San Juan, Hyde Park (\$44,000)
- St. Stephen's Church, South End, Boston (\$88,000)
- Boston Cantonese Congregation (\$88,000)

Hispanic Ministries in Salem and Lawrence: 3341, 3351

The parishes of St. Peter's Church, Salem and Grace Church, Lawrence receive grants to support their Hispanic ministries. In 2010, the core budget provided grants of \$70,000 and \$22,000, respectively; in 2011, the proposed allocations are \$80,000 and \$72,000, respectively, for a total increase of \$60,000. The increase in the grant to the Lawrence ministry should be balanced against the loss of diocesan support, in the amount of \$70,000 per year, that was provided from 2007 to 2010 through the Urban Residents program.

Urban Residents: 3411

The core budget has provided the funding for one urban resident, at \$70,000, for the past several years, while funding for the others has come from targeted development efforts and grants from the bishop's discretionary funds. In 2011 there will be four Urban Residents (one who is half time and three who are full time), three of whose terms expire mid-year.

African Ministries: 3431

The allocation for 2011 remains at \$47,500.

Jubilee Ministry: 3511

The Episcopal Church's General Convention asks dioceses to commit 0.7 percent to this work. Our core budget allocation to this program remains at \$45,000, just over the 0.7 percent commitment. The Jubilee Ministry supplements its grant programs with significant additional donations and other fundraising.

Mission through Partnerships: 3551

This covers diocesan work with parishes on mission partnerships. The 2011 budget allocation is \$10,000, which is a decrease of \$1,000 from the 2010 budget.

Episcopal City Mission: 3931

The budget continues the long-standing commitment to ECM's Burgess Urban Fund with a level-funded \$30,000 grant.

STRATEGIC MINISTRIES – CORE BUDGET 2011

CODE	ACTUAL 2009	BUDGET 2010	COST CENTER	BUDGET 2011	FEEES	PROGRAM	GRANTS	STIPENDS	STAFF	1099	SUPPORT	SERVICES	TRANSFER
	1,492,407	1,382,298	TOTALS:	1,257,281	0	125,000	787,100	0	321,181	0	24,000	0	0
3000	15,114	0	STRATEGIC MINISTRIES	0	0	0	0	0	0	0	0	0	0
3001	0	0	Young Adult and Youth Ministries	0	0	0	0	0	0	0	0	0	0
3011	114,755	102,000	Youth Ministry	139,230	0	70,000	0	0	69,230	0	0	0	0
3012	-2,633	0	Youth Leadership Academy	0	0	0	0	0	0	0	0	0	0
3051	77,900	40,000	Micah Project	0	0	0	0	0	0	0	0	0	0
3056	0	0	Life Together	75,000	0	0	75,000	0	0	0	0	0	0
3061	37,251	35,000	Relational Evangelism Project	0	0	0	0	0	0	0	0	0	0
3100	0	24,000	College Ministry	0	0	0	0	0	0	0	0	0	0
3111	117,933	111,604	MIT	112,523	0	0	0	0	106,523	0	6,000	0	0
3121	45,536	44,000	Boston University	54,803	0	0	0	0	48,803	0	6,000	0	0
3131	0	41,997	Boston College	6,000	0	0	0	0	0	0	6,000	0	0
3136	97,534	0	BC/NU Combined	96,625	0	0	0	0	96,625	0	0	0	0
3141	0	41,997	Northeastern	6,000	0	0	0	0	0	0	6,000	0	0
3151	18,148	0	Framingham State	0	0	0	0	0	0	0	0	0	0
3211	29,013	30,000	Natick, St Andrew's Deaf Ministry	0	0	0	0	0	0	0	0	0	0
3221	88,000	88,000	Brockton, St Paul's	0	0	0	0	0	0	0	0	0	0
3231	66,000	66,000	Chelsea, St Lukes/San Lucas	66,000	0	0	66,000	0	0	0	0	0	0
3241	49,000	44,000	Hyde Park, Christ Church/San Juan	44,000	0	0	44,000	0	0	0	0	0	0
3251	117,026	88,000	South End, St Stephen's	88,000	0	0	88,000	0	0	0	0	0	0
3311	207,849	88,000	Boston Cantonese Congregation	88,000	0	0	88,000	0	0	0	0	0	0
3321	2,800	20,000	Cantonese Life Program	0	0	0	0	0	0	0	0	0	0
3331	199,078	114,000	Dorchester Partnership	126,600	0	0	126,600	0	0	0	0	0	0
3341	35,000	70,000	Hispanic Ministry in Salem	80,000	0	0	80,000	0	0	0	0	0	0
3351	16,500	22,000	Lawrence, Grace Church	72,000	0	0	72,000	0	0	0	0	0	0
3411	70,328	70,000	Urban Residents	70,000	0	0	70,000	0	0	0	0	0	0
3421	30,250	95,000	Hispanic Ministries	0	0	0	0	0	0	0	0	0	0
3431	10,160	47,500	African Ministries	47,500	0	0	47,500	0	0	0	0	0	0
3441	0	0	Veterans' Ministry	0	0	0	0	0	0	0	0	0	0
3500	0	0	Mission Partnerships	0	0	0	0	0	0	0	0	0	0
3511	49,090	45,000	Jubilee Ministry	45,000	0	45,000	0	0	0	0	0	0	0
3521	0	0	Gulf Coast Partnership	0	0	0	0	0	0	0	0	0	0
3531	0	0	Committee on Palestine and Israel	0	0	0	0	0	0	0	0	0	0
3541	7,281	0	B-SAFE	0	0	0	0	0	0	0	0	0	0
3551	3,936	11,000	Mission Through Partnerships	10,000	0	10,000	0	0	0	0	0	0	0
3911	0	3,200	Cathedral Church of St Paul	0	0	0	0	0	0	0	0	0	0
3921	-53,097	0	Barbara C Harris Camp & Conf Center	0	0	0	0	0	0	0	0	0	0
3931	30,000	30,000	Episcopal City Mission	30,000	0	0	30,000	0	0	0	0	0	0
3941	0	0	Ecclesia Ministry	0	0	0	0	0	0	0	0	0	0
3951	9,700	10,000	MSASA EDS	0	0	0	0	0	0	0	0	0	0
3952	2,956	0	UTO/American Indians/CHS	0	0	0	0	0	0	0	0	0	0
3953	0	0	Episcopal Relief and Development	0	0	0	0	0	0	0	0	0	0

Episcopal and Diocesan Support (see table on page 23)

Diocesan Leadership Team: 4011, 4012, 4013, 4014

These four codes carry the compensation and supporting expenses for the diocesan bishop, the bishops suffragan and the canon to the ordinary. The expense budgets for the four members of the leadership team are significantly reduced by \$50,000.

Budgeted Resources for the Diocesan Leadership Team: 4099

Resources for Unforeseen Events and Needs: In order to be prepared for unexpected situations that may require additional funding, it is reasonable to set aside some funds now. Last year's budget had similar funds distributed among the five operational areas. For the 2011 budget the canon to the ordinary will work with the budget representatives from the five areas to evaluate the alternative uses of these funds during the year. The total amount set aside is \$85,000, somewhat arbitrarily allocated between "program" (\$70,000) and "support" (\$15,000).

Resources for Legal and Other Professional Services: From a bookkeeping perspective, legal work will be charged to the cost center(s) directly involved. From a budget perspective, there is a single budget line for legal services for the diocese, and that amounts to \$65,000 for 2011.

Area Staff and Expenses: 4000 (staff and support)

The diocesan full-time staff included in this area are the four members of the diocesan leadership team, plus the administrator of Convention and Council and the administrative assistant to the canon to the ordinary. In addition, there are budgeted resources for part-time and temporary support for Bishop Suffragan Harris and for the Archives.

Funds Available for Additional Staff Compensation: 4099

The final item in the 4099 cost code is an allocation of \$52,000 available for additional staff compensation. This is in addition to the \$26,432 budgeted to pay for the projected increase in health insurance premiums. As mentioned in an earlier section, increased staff salaries was a top priority for Bishop Shaw and Bishop Cederholm.

Assisting Bishops: 4021

The allocation remains at \$1,000 for payments to bishops who fill in as needed.

Title IV: 4061

The convention will be asked to approve new canons implementing Title IV disciplinary procedures. A reasonable estimate of the implementation costs in 2011 is \$10,000.

Diocesan Council, Standing Committee, Diocesan Youth Council: 4111, 4121, 4131

These three canonical bodies are level funded for 2011 at \$8,500, \$2,500 and \$3,000 respectively.

Diocesan Convention: 4141

Although the 2011 convention will be a two-day event at a hotel/conference center site, the core budget allocation remains at \$30,000 as the Development Council will assume some of the additional costs of the event.

Journals and Diocesan Directory: 4151

These costs are not expected to change in 2011, and thus are level funded.

Archives: 4211

The program allocation of \$8,486 and staff support of \$25,000 are supported through the revenue received from five trust funds: the Mary K. D. Babcock Fund I (50% of 7001Q), the Mary K. Babcock Fund II (7001R), the Julia K. Davey Fund (7001S), the William C. Winslow Fund (7001T) and the Edmund F. Slafter Fund II (9001B).

Contribution to the Massachusetts Council of Churches: 4251

In past years, the diocese has contributed \$50,000 to the Massachusetts Council of Churches. Last year's budget proposal indicated that we were looking for a co-sponsor of this grant; this search did not pan out. Thus, unlike last year, the 2011 core budget includes the full \$50,000.

Development: 4311

Since 2009, the Development Office staff has been funded in the supplemental budget, through a grant from the bishop's discretionary fund. The work of the Development Office, through the Annual Fund appeals, directed development efforts on behalf of specific ministries, external grant applications, planned giving and the development of a capital campaign are essential to the viability of a supplemental budget program.

General Convention: 4411

To prepare for the expenses of sending a delegation to the Episcopal Church's triennial General Convention in 2012, the core budget reserves \$18,000.

Province I Assessment and Program: 4421

The core budget allocation for 2011 is \$18,000, an increase of \$1,300 from the 2010 budget, as the province has increased its request of the member dioceses.

The Episcopal Church Ask: 4431

Last year the Diocesan Council formally adopted a process for determining the amount to budget for payment to the Episcopal Church. The new process identifies the specific "base" revenue streams on which the council agrees to compute the voluntary payment. The revenue streams identified for this purpose are: (a) the net contributions from congregations; and (b) the core budget spending policy draws from unrestricted trust funds and endowments. For the purpose of the 2011 budget, the budgeted expense is based on the projected revenues in 2011, even though the actual cash payment due to the Episcopal Church will not be due until 2013. (In 2011, our diocesan payments will be determined by the revenue received in 2009.)

EPISCOPAL AND DIOCESAN SUPPORT – CORE BUDGET 2011

CODE	ACTUAL 2009	BUDGET 2010	COST CENTER	BUDGET 2011	FEES	PROGRAM	GRANTS	STIPENDS	STAFF	1099	SUPPORT	SERVICES	TRANSFER
	2,305,547	2,212,900		2,247,175	0	143,486	998,724	50,000	888,590	37,875	97,500	83,000	0
			TOTALS:										
4000	17,587	175,000	EPISCOPAL AND DIOCESAN SUPPORT	146,203	0	0	0	0	143,703	0	2,500	0	0
4005	-3,844	0	Canon of the Ordinary Expenses	0	0	0	0	0	0	0	0	0	0
4010	0	784,000	Diocesan Leadership Team	0	0	0	0	0	0	0	0	0	0
4011	292,495	63,000	Diocesan Bishop	229,328	0	0	0	0	204,328	0	25,000	0	0
4012	201,789	33,000	Suffragan Bishop 1	191,297	0	0	0	0	173,297	0	18,000	0	0
4013	186,461	33,000	Suffragan Bishop 2	202,147	0	0	0	0	159,147	25,000	18,000	0	0
4014	158,580	0	Canon to the Ordinary	161,990	0	0	0	0	143,990	0	18,000	0	0
4021	401	1,000	Assisting Bishops	1,000	0	0	0	0	0	0	1,000	0	0
4031	21,338	0	Chancellor	0	0	0	0	0	0	0	0	0	0
4061	0	0	Title IV	10,000	0	10,000	0	0	0	0	0	0	0
4089	0	0	DLT Budgeted Resources	150,000	0	70,000	0	0	52,000	0	15,000	65,000	0
4100	0	0	Polity Administrative Support	0	0	0	0	0	0	0	0	0	0
4111	9,094	8,500	Diocesan Council	8,500	0	8,500	0	0	0	0	0	0	0
4121	2,726	2,500	Standing Committee	2,500	0	2,500	0	0	0	0	0	0	0
4131	2,589	3,000	Diocesan Youth Council	3,000	0	3,000	0	0	0	0	0	0	0
4141	92,210	30,000	EDOM Annual Convention	30,000	0	30,000	0	0	0	0	0	0	0
4151	9,585	11,000	Journals and Diocesan Directory	11,000	0	11,000	0	0	0	0	0	0	0
4211	10,944	7,200	Archives	33,486	0	8,486	0	0	12,124	12,875	0	0	0
4251	50,004	25,000	Mass Council of Churches	50,000	0	0	0	50,000	0	0	0	0	0
4261	1,685	0	Ecumenical Committee	0	0	0	0	0	0	0	0	0	0
4311	0	0	Development	0	0	0	0	0	0	0	0	0	0
4411	44,846	0	National General Convention	18,000	0	0	0	0	0	0	0	0	0
4421	17,057	16,700	Province I Assessment and Program	18,000	0	0	18,000	0	0	0	0	18,000	0
4431	1,190,000	1,020,000	The Episcopal Church Assessment	980,724	0	0	980,724	0	0	0	0	0	0

Administrative Services (see table on page 26)

Area Staff and Expenses: 5000

As shown in the staff table (see Appendix 5), this area has five staff positions within it, with a total compensation cost of \$415,938, plus \$5,000 allocated for area expenses.

Treasurer's Office: 5011

The plan for the Treasurer's Office is to add another staff person, but in the meantime, the office has relied on an external consultant. The budget is based on the current situation, and thus includes \$35,000 for "regular" outside consulting services and an additional \$115,000 for the current practice of using an outside consultant for functions that ideally will be turned over to permanent staff sometime in 2011. In addition, there is \$30,000 in the Treasurer's Office services allocation for the audit.

The fees of \$135,500 represent charges to various related entities for the services provided them by the Treasurer's Office. For 2011, the projected fees are \$69,300 from the Trustees of Donations, \$45,000 from the cathedral, \$20,000 from the Stokes loan fund, \$500 from Episcopal City Mission and \$250 each from the two societies (intentionally offsetting the two \$250 grants provided to the societies from the Benjamin Leeds endowment).

Human Resources: 5021

In the 2011 core budget, this cost center has its own expense allocation of \$2,000.

Information Technology: 5031

The information technology cost center makes use of a weekly external consultant, for which there is a \$50,000 allocation for 2011. In addition, the core budget provides \$25,000 for other purchases and services. The core budget also projects that the area will receive fees of \$2,750 each from the cathedral and Episcopal City Mission for the information technology services provided.

Risk Management: 5041

The projected insurance expenses for 2011 are \$75,000.

Facilities: 138 Tremont Street: 5111

The core budget allocates \$330,000 for rent paid to the cathedral, and an additional \$46,000 for phones, equipment and other services not paid for by other cost centers.

Depreciation and Capital Purchases

It has been standard budget practice that depreciation expenses have not been included in the annual budget. The effect of this is that funds for capital purchases are “free” in some sense; it is clear that they cannot be paid for through the annual budget process, so when a capital expenditure is needed, such as the HVAC renovation or deferred repairs to 40 Prescott Street, the council has a discussion that stretches over several meetings and usually takes an extraordinary draw from the unrestricted endowment to pay for it.

Our current auditors require us to include depreciation in our operating expenses, so the discrepancy between our budgeting practices and our audited statements will be clear to those who choose to examine both documents.

The dollar amount of depreciation expenses will be about \$180,000 in 2011, significantly higher than that in 2009 due to the HVAC work.

From the perspective of our spending policy draw from our endowment funds, the depreciation expense is equivalent to an additional draw from endowment of 1.1 percent.

ADMINISTRATIVE SERVICES – CORE BUDGET 2011

CODE	ACTUAL 2009	BUDGET 2010	COST CENTER	BUDGET 2011	FEES	PROGRAM	GRANTS	STIPENDS	STAFF	1099	SUPPORT	SERVICES	TRANSFER
	1,113,871	1,019,100	TOTALS:	992,138	-140,800	0	0	0	415,938	0	412,000	305,000	0
5000	448,809	620,400	ADMINISTRATIVE SERVICES	420,938	0	0	0	0	415,938	0	5,000	0	0
5011	205,195	0	Treasurer's Office	44,700	-135,300	0	0	0	0	0	0	180,000	0
5021	10,208	0	Human Resources	2,000	0	0	0	0	0	0	2,000	0	0
5031	87,595	72,000	Information Technology	69,500	-5,500	0	0	0	0	0	25,000	50,000	0
5041	96,101	136,000	Risk Management	75,000	0	0	0	0	0	0	0	75,000	0
5051	0	0	Investments	0	0	0	0	0	0	0	0	0	0
5100	0	0	Diocesan Facilities	0	0	0	0	0	0	0	0	0	0
5111	386,247	315,000	Boston, 138 Tremont Street	380,000	0	0	0	0	0	0	380,000	0	0
5121	1,857	0	Brookline, 40 Prescott Street	0	0	0	0	0	0	0	0	0	0
5131	2,750	0	Mission Properties	0	0	0	0	0	0	0	0	0	0
5141	1,910	0	Diocesan Properties	0	0	0	0	0	0	0	0	0	0
5511	-20,000	-20,000	Services to Stokes Loan	0	0	0	0	0	0	0	0	0	0
5521	-37,500	-35,000	Services to Cathedral	0	0	0	0	0	0	0	0	0	0
5531	0	0	Services to MCA	0	0	0	0	0	0	0	0	0	0
5541	-69,300	-69,300	Services to Trustees of Donation	0	0	0	0	0	0	0	0	0	0

2011 ASSESSMENTS BY DEANERY

This list of 2011 assessments is to be placed before the Diocesan Convention on November 6, 2010 for consideration and vote.

Key to selected columns:
M? "M" if a mission
EFFECTIVE RATE the 2011 assessment divided by the 2011 BASE, expressed as a percent
CHANGE FROM 2010 the 2011 assessment minus the 2010 assessment
TRANSITION ADJUSTMENT a negotiated adjustment for 2011 in lieu of a formulaic cap on increases

Note: Four parishes did not file their 2008 parochial reports by September 1, 2010. These parishes have 2011 assessments assigned to them, but are not included in the effective rate calculations.

ALEWIFE

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	Church of Our Saviour	Arlington	14,084	129,575	10.9	3,064	
	St. John's Church	Arlington	19,061	161,687	11.8	134	
	St. Paul's Church	Bedford	20,888	173,476	12.0	1,826	
	All Saints' Church	Belmont	33,859	257,157	13.2	1,945	
	St. Mark's Church	Burlington	11,203	110,989	10.1	24	
	Christ Church	Cambridge	101,839	745,738	13.7	5,847	7,750
	St. Bartholomew's Church	Cambridge	21,313	176,215	12.1	-552	
	St. James's Church	Cambridge	32,985	251,520	13.1	-1,486	
	St. Peter's Church	Cambridge	36,000	[not filed]	-	7,900	
	Church of Our Redeemer	Lexington	49,813	360,087	13.8	510	
	Christ Church	Somerville	4,568	68,182	6.7	540	
	St. James's Church	Somerville	4,088	65,088	6.3	-1,147	
	Christ Church	Waltham	19,490	164,458	11.9	-2,786	
	Church of the Good Shepherd	Watertown	5,679	75,349	7.5	1,566	
	TOTALS:		374,870	2,739,521	12.4	17,385	7,750

BOSTON HARBOR

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	St. John's Church	Boston (Charlestown)	13,393	148,872	9.0	0	3,682
	St. John's Church	Boston (Jamaica Plain)	20,314	169,768	12.0	3,089	
	Church of the Advent	Boston	141,441	951,235	14.9	8,460	
	Emmanuel Church	Boston	32,928	275,422	12.0	3,761	3,762
	St. Augustine's & St. Martin's Ch.	Boston (Roxbury)	14,009	129,094	10.9	-141	
	St. Cyprian's Church	Boston (Roxbury)	6,421	80,140	8.0	2,036	
	Church of St. John the Evangelist	Boston	25,695	204,484	12.6	9,711	
	St. John St. James Church	Boston (Roxbury)	6,931	83,428	8.3	-866	
	St. Mark's Church	Boston (Dorchester)	10,277	105,015	9.8	-1,359	
	St. Mary's Church	Boston (Dorchester)	3,755	62,937	6.0	-1,616	
M	St. Stephen's Church	Boston	1,771	55,850	3.2	-79	
	Trinity Church	Boston	485,736	3,172,494	15.3	-46,748	
	TOTALS:		762,671	5,438,739	14.0	-23,752	7,444

CAPE COD AND THE ISLANDS

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	St. Mary's Church	Barnstable	66,003	464,539	14.2	5,031	
	St. Peter's Church	Buzzards Bay	11,504	164,542	7.0	-3,544	8,000
	St. Christopher's Church	Chatham	64,257	453,277	14.2	4,352	
	St. Andrew's Church	Edgartown	30,786	237,335	13.0	-9,276	
	St. Barnabas's Church	Falmouth	69,037	484,115	14.3	-10,760	
	Church of the Messiah	Falmouth (Woods Hole)	30,240	233,808	12.9	5,396	
	Christ Church	Harwich Port	35,450	267,425	13.3	-1,343	
	St. Paul's Church	Nantucket	47,346	344,170	13.8	1,003	
	Trinity Church	Oak Bluffs	0	29,936	0.0	-333	
	Church of the Holy Spirit	Orleans	58,799	418,061	14.1	-7,491	
	St. Peter's Church	Osterville (Barnstable)	53,843	386,089	13.9	-10,028	
	Christ Church	Plymouth	39,000	369,945	10.5	-5,761	12,341
	St. Mary's Church	Provincetown	17,313	150,411	11.5	2,402	
	St. John's Church	Sandwich	45,050	329,359	13.7	9,238	
	St. David's Church	South Yarmouth	30,514	235,578	13.0	-4,439	
	Grace Church	Vineyard Haven	36,534	274,417	13.3	711	
	Church of the Good Shepherd	Wareham	24,875	199,194	12.5	505	
	Chapel of St. James	Wellfleet	0	13,364	0.0	0	
	TOTALS:		660,551	5,055,565	13.1	-24,337	20,341

2011 ASSESSMENTS BY DEANERY

CHARLES RIVER

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	All Saints Parish	Brookline	57,065	406,874	14.0	773	
	Church of Our Saviour	Brookline	36,662	275,243	13.3	-3,084	
	St. Paul's Church	Brookline	35,974	270,804	13.3	-6,087	
	St. Dunstan's Church	Dover	26,739	227,352	11.8	2,404	2,500
	Christ Church	Needham	70,063	490,735	14.3	-2,636	
	Grace Church	Newton	46,871	341,107	13.7	300	
	Church of the Good Shepherd	Newton (Waban)	46,166	336,561	13.7	3,769	
	Church of the Messiah	Newton (Auburndale)	10,325	105,327	9.8	745	
	Church of the Redeemer	Newton (Chestnut Hill)	101,319	692,385	14.6	13,452	
	St. John's Church	Newton (Newtonville)	20,983	174,084	12.1	-2,138	
	St. Paul's Church	Newton Highlands	13,318	140,766	9.5	2,478	2,500
	St. Mary's Church	Newton Lower Falls	43,816	321,398	13.6	1,949	
	Trinity Church	Newton Centre	36,118	271,734	13.3	1,325	
	St. Andrew's Church	Wellesley	118,565	803,649	14.8	5,794	
	TOTALS:		663,984	4,858,019	13.7	19,044	5,000

CONCORD RIVER

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	Church of the Good Shepherd	Acton	39,388	292,827	13.5	-6,694	
	St. Andrew's Church	Ayer	12,600	120,003	10.5	823	
	Trinity Church	Concord	92,039	632,513	14.6	2,861	
	St. Andrew's Church	Framingham	36,720	275,619	13.3	3,573	
	St. Michael's Church	Holliston	17,491	177,362	9.9	5,162	4,000
	St. Paul's Church	Hopkinton	9,549	100,321	9.5	406	
	St. Luke's Church	Hudson	4,547	68,050	6.7	1,308	
	St. Anne's Church	Lincoln	71,416	499,464	14.3	-3,112	
	St. Paul's Church	Natick	57,774	411,446	14.0	9,324	
M	St. David's Church	Pepperell	4,302	80,345	5.4	223	
	Trinity Chapel	Shirley	4,556	68,109	6.7	2,328	
	St. Mark's Church	Southboro	41,935	309,262	13.6	1,790	
	St. Elizabeth's Church	Sudbury	43,115	316,872	13.6	4,897	
	Church of the Holy Spirit	Wayland	32,216	246,557	13.1	1,667	
	St. Peter's Church	Weston	58,160	413,939	14.1	9,348	
	TOTALS:		525,808	4,012,689	13.1	33,904	4,000

MERRIMACK VALLEY

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	St. James's Church	Amesbury	11,315	111,712	10.1	1,554	
	Christ Church	Andover	78,307	543,918	14.4	5,933	
	All Saints' Church	Chelmsford	32,765	250,099	13.1	2,500	
	St. James's Church	Groveland (South)	11,661	124,411	9.4	2,225	1,622
	Trinity Church	Haverhill	24,603	261,960	9.4	-12,512	10,000
	Grace Church	Lawrence	8,000	90,323	8.9	-16,735	
	St. Anne's Church	Lowell	23,038	224,178	10.3	2,855	5,709
	St. John's Church	Lowell	5,402	73,567	7.3	4,739	
	St. Andrew's Church	Methuen	3,875	63,710	6.1	-757	
	St. Paul's Church	Newburyport	39,847	295,788	13.5	-1,093	
	St. Paul's Church	North Andover	22,346	224,816	9.9	2,980	6,500
	St. Anne's Church	North Billerica	22,081	181,168	12.2	3,393	
M	All Saints' Church	West Newbury	1,308	51,377	2.5	-1,408	
	St. Mark's Church	Westford	18,308	156,828	11.7	-3,026	
	TOTALS:		302,856	2,653,855	11.4	-9,352	23,831

2011 ASSESSMENTS BY DEANERY

MT HOPE/BUZZARDS BAY

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	St. Peter's Church	Dartmouth (South)	11,082	110,207	10.1	-3,269	
	Church of the Good Shepherd	Fairhaven	0	27,638	0.0	0	
	Church of the Holy Spirit	Fall River	25,000	200,000	12.5	0	
	St. Luke's Church	Fall River	0	28,843	0.0	0	
	St. Gabriel's Church	Marion	38,850	289,358	13.4	4,241	
	Grace Church	New Bedford	77,936	541,529	14.4	7,057	
	St. Andrew's Church	New Bedford	9,223	98,214	9.4	3,666	
	St. Martin's Church	New Bedford	7,372	86,274	8.5	4,592	
	Church of Our Saviour	Somerset	8,896	129,991	6.8	-3,477	5,252
	Christ Church	Swansea	19,620	165,294	11.9	544	
	TOTALS:		197,979	1,677,348	11.8	13,354	5,252

MYSTIC VALLEY

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
M	St. Andrew's/Grace Church Fed.	Boston (East)	0	1,406	0.0	0	
M	St. Luke's Church	Chelsea	2,711	95,199	2.8	0	3,126
	Grace Church	Everett	6,046	77,722	7.8	5,536	
	St. Paul's Church	Lynnfield	15,328	165,347	9.3	4,316	4,300
	St. Paul's Church	Malden	19,537	164,761	11.9	5,817	
	Grace Church	Medford	19,916	167,202	11.9	-1,904	
	Trinity Church	Melrose	21,182	175,370	12.1	-2,131	
	Church of the Good Shepherd	Reading	22,182	181,820	12.2	1,773	
	St. John's Church	Saugus	11,896	115,459	10.3	-1,509	
	All Saints' Church	Stoneham	2,746	56,431	4.9	-793	
	Emmanuel Church	Wakefield	10,335	116,543	8.9	939	1,729
	St. Elizabeth's Church	Wilmington	4,800	[not filed]	-	956	
	Parish of the Epiphany	Winchester	90,210	620,713	14.5	-11,761	
	St. John's Church	Winthrop	11,929	115,674	10.3	-8,067	
	Trinity Parish	Woburn	3,052	58,402	5.2	-1,638	
	TOTALS:		241,870	2,112,049	11.2	-8,466	9,155

NEPONSET RIVER

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	All Saints' Church	Boston (Ashmont)	48,090	348,972	13.8	5,191	
	Christ Church	Boston (Hyde Park)	15,004	135,516	11.1	8,916	
M	Iglesia de San Juan	Boston (Hyde Park)	0	21,286	0.0	0	
	Church of the Holy Spirit	Boston (Mattapan)	36,856	350,760	10.5	5,000	11,511
	Emmanuel Church	Boston (W. Roxbury)	8,975	96,619	9.3	2,428	
	Trinity Church	Canton	16,500	[not filed]	-	3,343	
	Church of the Good Shepherd	Dedham	8,733	95,053	9.2	1,243	
	St. Paul's Church	Dedham	38,011	283,945	13.4	-2,348	
	Church of the Advent	Medfield	34,118	258,826	13.2	7,488	
	Christ Church	Medway	3,026	84,686	3.6	-207	4,100
	St. Michael's Church	Milton	58,748	417,732	14.1	3,618	
	Grace Church	Norwood	19,444	164,156	11.8	1,021	
	St. John's Church	Sharon	0	37,694	0.0	-293	
	Trinity Church	Stoughton	6,900	[not filed]	-	1,387	
	Epiphany Church	Walpole	19,477	164,369	11.8	4,763	
	St. John's Church	Westwood	18,238	156,377	11.7	-1,923	
	TOTALS:		332,120	2,615,991	11.8	39,627	15,611

2011 ASSESSMENTS BY DEANERY

NORTH SHORE

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	St. Peter's Church	Beverly	31,852	244,212	13.0	581	
	St. John's Church	Beverly Farms	81,976	567,590	14.4	2,596	
	Calvary Church	Danvers	15,802	160,016	9.9	4,036	3,000
	St. John's Church	Gloucester	38,576	287,588	13.4	3,868	
	Ascension Memorial Church	Ipswich	25,303	201,955	12.5	78	
	St. Stephen's Church	Lynn	34,797	263,208	13.2	154	
	St. Andrew's Church	Marblehead	41,165	304,294	13.5	-6,831	
	St. Michael's Church	Marblehead	36,817	276,243	13.3	1,337	
	St. Paul's Church	Peabody	8,092	90,918	8.9	4,013	
	St. Mary's Church	Rockport	17,993	154,794	11.6	1,940	
	Grace Church	Salem	22,245	209,323	10.6	2,123	4,200
	St. Peter's Church	Salem	17,592	152,208	11.6	2,907	
	Christ Church	S. Hamilton & Wenham	50,000	924,262	5.4	-30,000	87,260
	Church of the Holy Name	Swampscott	14,262	147,564	9.7	2,710	2,610
	Trinity Church	Topsfield	30,613	236,219	13.0	-219	
	TOTALS:		467,085	4,220,394	11.1	-10,707	97,070

SOUTH SHORE

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	Emmanuel Church	Braintree	7,451	86,786	8.6	195	
	St. Stephen's Church	Cohasset	45,178	330,184	13.7	2,991	
	Church of St. John the Evangelist	Duxbury	51,937	373,788	13.9	478	
	St. Andrew's Church	Hanover	19,319	163,354	11.8	1,274	
	Parish of St. John the Evangelist	Hingham	58,032	413,114	14.0	1,791	
	St. John's Church	Holbrook	4,166	65,592	6.4	745	
	Trinity Church	Marshfield Hills	17,413	151,052	11.5	2,120	
	Church of Our Saviour	Milton	11,618	113,665	10.2	1,260	
	Christ Church	Quincy	16,259	143,608	11.3	1,070	
	Parish of St. Chrysostom	Quincy (Wollaston)	18,095	232,872	7.8	5,518	12,000
	Trinity Church	Randolph	14,759	149,276	9.9	0	2,378
	Trinity Church	Rockland	4,618	68,506	6.7	2,134	
	St. Luke's Church	Scituate	31,806	243,914	13.0	-546	
	Church of the Holy Nativity	South Weymouth	14,084	129,578	10.9	1,031	
	Trinity Church	Weymouth	8,426	93,074	9.1	-64	
	All Saints' Church	Whitman	10,018	103,347	9.7	-1,310	
	TOTALS:		333,179	2,861,710	11.6	18,687	14,378

TAUNTON RIVER

M?	CHURCH	LOCATION	2011 ASSESSMENT	2011 BASE	EFFECTIVE RATE	CHANGE FROM 2010	ADJUSTMENT
	All Saints' Church	Attleboro	12,177	117,273	10.4	3,111	
	Trinity Church	Bridgewater	7,367	86,243	8.5	-1,345	
M	St. Paul's Church	Brockton	2,857	66,367	4.3	-1,076	
	St. Mark's Church	Foxboro	24,673	197,894	12.5	566	
	St. John's Church	Franklin	6,348	79,669	8.0	-1,064	
	Church of St. John the Evangelist	Mansfield	4,628	68,570	6.7	1,157	
	Church of Our Saviour	Middleboro	26,721	211,104	12.7	2,172	
	Grace Church	North Attleboro	23,906	192,948	12.4	-129	
	St. Mark's Church	North Easton	1,131	46,012	2.5	-498	
	St. John's Church	Taunton	4,631	68,591	6.8	-655	
	St. Thomas's Church	Taunton	28,088	219,924	12.8	-642	
	Trinity Church	Wrentham	23,153	188,088	12.3	16	
	TOTALS:		165,680	1,542,683	10.7	1,613	0

TOTAL ASSESSMENTS: 5,028,653 39,788,562 12.5 67,000 209,832

PROJECTED VOLUNTARY CONTRIBUTIONS: 36,000

less RESERVES: (128,653)

REVENUE FROM CONGREGATIONS (net): 4,936,000

Appendix 1: Grants to Congregations in 2009

Congregational Development Grants

Phase I			
Church	Town	Title	Amount
All Saints' Church	Attleboro	Saints Alive Program	\$4,200
Ecclesia	Boston	Continued Ministry to Formerly Homeless Year II	\$2,500
Episcopal Chinese Ministry	Boston	Xaris Zone Year II	\$7,500
St. Stephen's Church	Boston	Young Adult and Family Ministry	\$4,000
The Crossing	Boston	Small Group and Formation Ministry	\$4,525
St. Mark's Church	Burlington	Young Adults in Medium-Size, Suburban Church	\$3,000
St. John's Church	Charlestown	Inviting and Forming Program	\$4,000
Cape and Islands Deanery	Chatham	Practical Eco-Stewardship	\$4,000
St. James's Church	Groveland	Stewardship and Disciples	\$5,000
St. Andrew's Church	Hanover	Growing St. Andrew's	\$2,500
Trinity Church	Haverhill	Joyful Noise	\$5,000
St. Michael's Church	Holliston	Children's Program and Intergenerational	\$2,600
St. John's Church	Jamaica Plain	Nightsong and First Thursday Concert	\$3,000
Grace Church	Lawrence	Grace Church's Music Program	\$3,000
St. Stephen's Church	Lynn	Christ-Like Hospitality Year III	\$8,000
Trinity Church	Marshfield	One Excellent Mission Year II	\$6,000
Church of the Holy Spirit	Mattapan	Dual Language Pilot Program	\$3,600
Church of the Advent	Medfield	Further... Growing Our Children Year III	\$2,900
Grace Church	Medford	Godly Play Christian Education	\$5,000
St. Michael's Church	Milton	Parent Strengthening Year III	\$1,400
St. Andrew's Church and St. Martin's Church	New Bedford	Christian Education and Evangelism in North and South New Bedford	\$5,000
St. Paul's Church	Newton Highlands	Teenagers: Retrieving the Lost Generation	\$6,100
St. Paul's Church and St. James's Church	North Andover and Groveland	Ministry of Mothers Sharing Year II	\$6,000
Christ Church	Plymouth	Equipping the Saints: Leadership Training	\$3,500
St. Mary of the Harbor	Provincetown	Inspired and Inspired	\$3,000
Church of the Good Shepherd	Reading	Godly Play Christian Education	\$3,360
Trinity Church	Rockland	Deaf and Hearing Impaired Ministry	\$3,500
St. John St. James Church	Roxbury	Children's Youth Choir	\$5,000
St. Peter's Church	Salem	Hispanic Ministry Transition	\$5,500
St. John's Church	Sandwich	Expansion of Children and Youth Programs	\$2,000
Church of Our Saviour	Somerset	Second Annual Retreat	\$5,000
Church of the Epiphany	Walpole	Hangtime	\$1,000
Small Church Collaboration Grant		Special Program	\$9,315
			\$140,000
Phase II			
Church	Town	Title	Amount
All Saints Parish	Brookline	African Ministries Support	\$6,113
Special Needs Community	Brookline	Special Needs Christian Education	\$10,000
St. Peter's Church	Buzzards Bay	Church in Transition Support	\$6,800
St. John's Church	Franklin	Stewardship Program Grant	\$7,000
Trinity Church	Haverhill	Collaborative Ministry with West Newbury	\$10,000
St. Chrysostom's Church	Quincy	Joint Youth Program with Trinity Weymouth	\$800
Trinity Church	Randolph	Stewardship Program Grant	\$6,458
Hispanic Ministries	Salem	Programs	\$5,000
All Saints' Church	West Newbury	Church in Transition Support	\$10,675
Trinity Church	Weymouth	Stewardship Program Grant	\$7,154
			\$70,000

Italics indicates encumbered funds

Appendix 1: Grants to Congregations in 2009 (continued)

Sending Serving Grants and House of Mercy Grants

Sending Serving Grants Budget **\$48,000**

Alewife Deanery

St. James's Church	Cambridge	Women's Meal: Good Food Good Friends	\$1,000
Church of the Good Shepherd	Watertown	Living Stones	\$2,500

Boston Harbor Deanery

St. Luke's & St. Margaret's	Allston	SLAM Diaper Ministry	\$2,000
St. Stephen's Church	Boston	B-SAFE Steel Drum Band	\$2,000

Charles River Deanery

All Saints Parish	Brookline		\$4,000
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Concord River Deanery

St. Andrew's Church	Framingham	Framingham State Interim Chaplaincy	\$4,000
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Merrimack Valley Deanery

		Youth Mission Trip to NYC	\$4,000
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Mystic Valley Deanery

St. Luke's-San Lucas	Chelsea	St. Luke's Soup Kitchen	\$4,000
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Neponset River Deanery

Christ Church	Hyde Park	Young People's Program	\$4,000
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North Shore Deanery

St. Peter's Church	Beverly	Sunday Night Suppers	\$1,333.33
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St. Stephen's Church	Lynn	Lynn Youth Program	\$1,333.33
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St. Peter's Church	Salem	Hispanic Ministry Transition	\$1,333.33
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South Shore Deanery

St. Paul's Community, Inc.	Brockton	St. Paul's Table	\$2,000
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Christ Church	Quincy	Essential Pantry	\$2,000
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\$35,499.99

House of Mercy Grants Budget

For B-SAFE **\$120,000**

Available for Grants through Deaneries **\$60,000**

Alewife Deanery

Christ Church, Cambridge and

Church of the Good Shepherd	Watertown	Deanery Youth Event	\$417
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St. James's Church	Cambridge	Food Pantry Women's Meal	\$1,000
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Christ Church	Waltham	Diaper Depot	\$4,000
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Christ Church	Waltham	Diaper Depot	\$417
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Church of the Good Shepherd	Watertown	Jubilee Dinner/Action	\$417
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\$6,251

Boston Harbor Deanery

St. Augustine's & St. Martin's	Boston	Ecclesia Ministries Art Program	\$625
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St. Mary's Church	Dorchester	BHD Youth Group & Steel Band	\$5,000
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St. Mary's Church	Dorchester	Clothing Closet	\$625
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\$6,250

Cape and Islands Deanery

Cape Cod Council of Churches Inc.		A Baby Center, Hyannis	\$5,000
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\$5,000

Appendix 1: Grants to Congregations in 2009 (continued)

House of Mercy Grants (continued)

Charles River Deanery

All Saints Parish	Brookline	Crossroads Family Shelter	\$1,250
		Crossroads Family Shelter	\$625
Church of the Redeemer	Chestnut Hill	Roxbury Presbyterian Social Impact Center	\$1,250
Christ Church	Needham	Casa Nueva Vida	\$1,250
		Circle of Hope	\$625
St. Paul's Church	Newton Highlands	Newton School for Children Scholarship	\$1,250
			<hr/> \$6,250

Concord River Deanery

		Concord Prison Outreach	\$500
St. Michael's Church	Holliston	Le Chef program	\$1,250
St. Luke's Church	Hudson	Hudson Community Supper	\$1,000
St. Luke's Church	Hudson	MCI Framingham	\$1,000
		Metro West Interfaith Hospitality Network	\$1,000
		Reach Beyond Domestic Violence	\$1,100
		Read to Me Daddy	\$400
			<hr/> \$6,250

Mystic Valley Deanery

Christ Church	Andover	Catechesis of the Good Shepherd	\$417
Trinity Church	Haverhill	Academy of Creative Arts at Trinity	\$417
Grace Church	Lawrence	Environmental Stewardship Outreach	\$2,500
Grace Church	Lawrence	Green Jobs Training	\$417
All Saints' Church	West Newbury	Teen Night Program	\$2,500
			<hr/> \$6,251

Mt. Hope-Buzzards Bay Deanery

Church of the Holy Spirit	Fall River	One Sister's Place	\$2,000
Grace Church	New Bedford	The Woman's Center	\$2,000
St. Andrew's Church	New Bedford	Summer Youth Sports Program	\$1,000
			<hr/> \$5,000

Neponset River Deanery

Christ Church	Hyde Park	Young People's Program	\$1,250.00
			<hr/> \$1,250.00

North Shore Deanery

		Safe Havens: Partnership Against Domestic Violence	\$1,250
St. Stephen's Church	Lynn	Kids in Community	\$1,250
St. Stephen's Church	Lynn	Oasis Community Youth Group	\$312.50
St. Michael's Church	Marblehead	Sunday Nursery/Child Care	\$312.50
St. Paul's Church	Peabody	Summer Meals Program	\$1,250
St. Paul's Church	Peabody	Brazilian Team Ministry	\$312.50
St. Peter's Church	Salem	Women's Health Fair & Godly Play	\$1,250
St. Peter's Church	Salem	Youth Ministry Worship Materials	\$312.50
			<hr/> \$6,250

Appendix 1: Grants to Congregations in 2009 (continued)

House of Mercy Grants (continued) and Case Bristol Grants

South Shore Deanery

St. Paul's Community	Brockton	Women in Need (St. Paul's Table)	\$1,250
St. Stephen's Church	Cohasset	Mary and Martha Learning Center	\$625
St. David's Church	Halifax	Women in Need	\$1,250
Trinity Church	Marshfield	Women in Need-Sewing Seeds Program	\$1,250
Trinity Church	Marshfield	Carolina House	\$625
Christ Church	Quincy	Women in Need-Essential Pantry	\$1,250
			<hr/>
			\$6,250

Taunton River Deanery

		Diocesan Jubilee Ministry	\$1,000
Bristol Cluster		N. Easton, St. Mark's HUGS II	\$1,000
St. Paul's	Brockton	St. Paul's Table	\$650
St. Mark's Church	Foxboro	The New Trading Post	\$1,350
St. Thomas's Church	Taunton	Our Daily Bread	\$1,000
			<hr/>
			\$5,000

italics indicates remaining grant funds

Grants Awarded through Deaneries \$60,002

Case Bristol Budget \$120,000

St. Luke's Church	Fall River	Urban Youth Outreach	\$9,000
Church of St. John the Evangelist	Mansfield	Christian Education Project	\$21,300
		Kitchen Remodeling	
Grace Church	New Bedford	Vacation Bible School	\$8,400
		After School Program	
		175 Youth Concert	
		Y2A Spiritual Journey to PA	\$1,400
St. Andrew's Church	New Bedford	Summer Youth Enrichment	\$3,000
St. Martin's Church	New Bedford	incomplete application (-\$1,400)	
Grace Church	North Attleboro	Jubilee Ministries	\$7,500
St. Mark's Church	North Easton	Public School Fund	\$4,200
		Support Our Troops	
		Lift Us Up	
Church of Our Saviour	Somerset	Youth Space	\$2,430
		Retreat Transportation	
St. Peter's Church	South Dartmouth	Parenting Ministry	\$10,000
		Children's Ministry	
Christ Church	Swansea	Ministry with Children	\$7,500.00
St. John's Church	Taunton	Angel Fund	\$6,500.00
		Food Basket	
		Reduce Carbon Footprint	
		Kitchen Update	
		Youth Ministries	
St. Thomas's Church	Taunton	Affordable Housing	\$15,000
			<hr/>
			\$96,230.00

Appendix 1: Grants to Congregations in 2009 (continued)

Clergy Continuing Education Funds, Sabbatical Grants, Bishops' Funds,
Clergy Children College Scholarships, Stokes Fund Loans

Clergy Continuing Education Funds

St. Mary's Church	Barnstable	Retreat Program	\$800
Church of St. John the Evangelist	Boston	Theology, Ethics & Liturgy Research	\$150
MIT	Cambridge	Appreciative Leadership	\$300
St. John's Church	Charlestown	Appreciative Leadership	\$580
Grace Church	Everett	Retreat Program	\$400
St. John's Church	Jamaica Plain	Leadership Workshop	\$600
Grace Church	Lawrence	Evangelism Program	\$800
St. Anne's-in-the-Fields Church	Lincoln	Clergy Leadership Program	\$250
St. Anne's Church	Lowell	Anglican Communion Study Program	\$600
		Institute for Nonprofit Management	\$400
St. Michael's Church	Marblehead	Clergy Leadership Program	\$800
Trinity Church	Melrose	Clergy Leadership Program	\$250
Trinity Church	Randolph	Institute for Nonprofit Management	\$600
St. John St James Church	Roxbury	Administrative Skills Program	\$400
St. Peter's Church	Salem	Theological and Pastoral Spanish	\$350
			\$7,280

Sabbatical Grants

Christ Church	Andover		\$5,000
St. Mary's Church	Barnstable		\$5,000
Christ Church (Old North)	Boston		\$5,000
St. Stephen's Church	Boston		\$7,500
Diocesan Staff			\$5,000
Christ Church	So. Hamilton		\$3,000
St. Michael's Church	Holliston		\$3,000
Church of the Holy Spirit	Wayland		\$3,000
			\$36,500

Bishops' Funds

Aid to Congregations	12 grants	\$47,000
Aid to Clergy	20 grants	\$36,285
Mission and Outreach	6 grants	\$30,250
Children's Programs not including B-SAFE	3 grants	\$12,500
		\$126,035

Clergy Children College Scholarships

15 students	\$38,000.00
	\$38,000.00

Society for the Relief of Aged or Disabled Clergy

Served 46 members of the clergy	\$103,781
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Society for the Relief of Widows, Widowers and Orphans of Clergy

Served 35 widows	\$52,273
	\$156,054

Stokes Fund Loans

May 2010 Balance	\$2,807,782
102 loans	
6 churches - 6 mos. in arrears	
45 churches ahead	
remaining current - 1.5 mos. Behind	

Appendix 2: Spending Policy—Trust Funds

2011 SPENDING POLICY REVENUE DETAIL – TRUST FUNDS

ACCOUNT	AMOUNT	FUND
7000A	-160,912	DIOCESAN ENDOWMENT FUND
7000B	-61,699	VOTE OF CORP DIOCESAN FUND - VOC
7003X	-41,420	PATTON MEMORIAL FUND
9000Z	-6,005	Abby Brown Trust- VOC
	-270,036	TOTAL UNRESTRICTED
ACCOUNT	AMOUNT	FUND
7000D	-8,260	Fay Donation
7000G	-166,905	BENJAMIN LEEDS FUND - VOC
7000I	-3,063	Churches/Chapel
7001E	-1,714	APPLETON FUND
7001F	-40,219	BISHOP'S FUND
7001G	-5,064	BISHOP OF MA SALARY FUND
7001H	-8,312	BISHOPS HOUSE FUND
7001I	-32,549	SUFFRAGAN BISHOPS FUND
7001J	-1,275	CAMILLA DAVENPORT FUND
7001K	-28,501	CORNELIA A FRENCH FUND
7001L	-5,924	Katherine French
7001O	-39,042	ETHEL A CLARK FUND
7001Q	-9,069	MARY K D BABCOCK FD I
7001R	-1,132	MARY K D BABCOCK FD II
7001S	-2,819	JULIA K DAVEY FUND
7001T	-413	WILLIAM C WINSLOW FUND - VOC
7001W	-1,525	WK OF MERCY HARVISON FUND
7001X	-1,830	AMY YEAMES FUND
7001Y	-799	EDITH MUNRO FUND
7002Q	-7,690	AC BULLARD FD STUDENTS
7004B	-3,389	PATTON FUND FOR MAINTENANCE
7004C	-7,189	KATHERINE M. FOSTER TRUST
7004D	-1,488	FRANK H. BURNETT FUND
9001B	-7,521	Edmund F. Slafter Fund II
	-385,691	TOTAL RESTRICTED
	-655,727	TOTAL TRUST FUNDS

Appendix 3: Spending Policy—Endowment Funds

2011 SPENDING POLICY REVENUE DETAIL – ENDOWMENT FUNDS

ACCOUNT	AMOUNT	FUND
7002X	-69,372	General Endowment
7002Z	-6,299	Roslindale Fund
	-75,670	TOTAL UNRESTRICTED
ACCOUNT	AMOUNT	FUND
7002C	-41,755	Coburn Chair & Income
7002D	-4,084	C.L.T. LEE / B. WONG FUND
7002E	-8,679	MSASA/African Scholarship
7002G	+3,389	Endowment Fund for Maintenance **
7002J	-19,077	AIM Hospital Ministry
7002L	-1,330	Harriet G Averill Fund
7002M	-6,888	Bishop Nash
7002N	-25,297	Clergy Salary
7002P	-8,442	Lawrence Fund (Rhineland Fund)
7002T	-104,052	Case Bristol County Fund
7002U	-7,958	Campus Ministry
7002V	-21,674	East Boston
7002Y	-24,117	House of Mercy
7003A	-26,214	Jessie B Cox (Cox Fellowship)
7003B	-33,576	William Tripp Fund
7003C	-31,703	AIM Christian Witness
7003D	-5,668	Maurine C. Coburn
7003E	-6,009	Youth on Mission
7003F	-125,091	AIM William Coolidge
7003K	-243	Pooled Income Fund
7003R	-3,099	Chisholm Fund
7003T	-4,515	J. GETCHELL FUND
7004E	-42,169	SEMINARIAN EDUCATIONAL ENDOWMENT
7004H	-37,168	Deaf Ministry Endowment
	-595,142	TOTAL RESTRICTED
	-661,090	TOTAL ENDOWMENT FUNDS

** Fund 7002G will re-invest the income from trust fund 7004B in order to build up the maintenance reserve fund

Appendix 4: Proceeds from Sales of Diocesan-Owned Properties

Over a four-year period, nine churches have been closed (St. Luke's and St. Margaret's Church in Allston; St. Andrew's Church in Belmont; St. David's Church in Halifax; St. Augustine's Church in Lawrence; St. Alban's Church in Lynn; St. Luke's Church in Malden; the Church of the Holy Trinity in Marlborough; St. George's Church in Maynard; and the Church of St. Matthew and the Redeemer in South Boston). In Fall River, two churches (St. Mark's Church and St. John's-St. Stephen's Partnership) have merged with the former Church of the Ascension to form the new Church of the Holy Spirit. Two others are in the process of closing (St. Paul's Church in Millis and St. Paul's Church in Brockton). And although it didn't own its building, St. Andrew's Church of the Deaf has converted its assets into a grant fund administered through the Congregational Resources and Training area. As a result the diocese has approximately \$3.6 million in hand from property sales, with additional sales anticipated (Lawrence and Halifax are on the market; Brockton and Millis are being appraised).

Allocation of the net proceeds from the sale of diocesan-owned property and closed churches follows guidelines approved by the Diocesan Council in 2007 and revised in 2010. With a mandate of responsible stewardship, Council adopted the guidelines based on several assumptions: that there be no mandated formula for the allocation of proceeds; that all such proceeds be evaluated with reference to the situation that predicated the sale; that, since future generations have a claim on these resources, efforts should always be made toward allocating a significant portion of proceeds to a diocesan endowment; and that there is a responsibility to maintain diocesan center facilities.

The guidelines themselves involve a listening process, through which the bishop appoints a Proceeds Task Force from the Diocesan Council. The task force will develop an application process and will keep the big-picture mission strategy for the whole diocese in mind as decisions are made. For each sold property additional members will be added to the task force from the deanery, congregation or the diocese at large. Each variation of the task force will receive applications, evaluate the situation that predicated the closure and sale, identify relevant stakeholders and hear their stories and suggestions for the use of proceeds. The task force also explores ways to publicly honor and memorialize the experience of God in Christ that took place at the closed site.

In the decision-making process that follows, the task force considers net amounts and works within a framework of saving for the future and investing in congregational vitality and viability today, with a bias toward allocating up to 50 percent to an endowed fund and 30 percent of every dollar back to congregations. Remaining amounts may be allocated to seed new ministry initiatives (10 percent) and to fund capital improvements to the diocesan office facilities.

The task force presents its recommendations first to the Diocesan Council's Executive Committee, then to the full Council for final approval. It is hoped that the task force will begin its work before the end of the year.

Appendix 5: Staff Roster

Position	Incumbent
DIOCESAN STAFF POSITIONS BY AREA (excluding interns and part time lay staff)	
DEANERIES, CONGREGATIONS AND CLERGY	
Administrative Assistant Canon for Transition Ministry and Clergy Deployment Officer for Ordained Vocations Administrative Assistant for Congregations and Clergy Administrative Assistant	Ms. Jackie Drapeau The Rev. Canon Cynthia Hubbard Ms. Judith Lidberg Ms. Clare Moffitt Ms. Diane Pound
CONGREGATIONAL RESOURCES AND TRAINING	
Director Christian Formation Specialist and Resource Center Manager Coordinator for Congregational Support Director of Communications	vacant (part-time interim: The Rev. Karen Montagno) Ms. Amy Cook Mr. Stephen Pierce Ms. Tracy Sukraw
STRATEGIC MINISTRIES	
Director, Life Together Vicar, St. Stephen's South End Chaplain, MIT Priest-in-charge, Dorchester Partnership Cox Fellow, Dorchester Partnership Director, Youth Ministries Assistant Director, Life Together Canon for Asiamerican Ministries Chaplain, Boston College and Northeastern University Interim Chaplain (part time), Boston University	The Rev. R. Arrington Chambliss The Rev. Timothy E. Crellin The Rev. Janie Donohue The Rev. Cathy H. George The Rev. Eric M. Hillegas The Rev. Kit Lonergan Mr. Jason Long The Rev. Canon Thomas Pang The Rev. Judith Stuart The Rev. Joshua Thomas
EPISCOPAL AND DIOCESAN SUPPORT	
Assistant Manager for Development Development Director Administrator, Council/Convention Administrative Assistant Archivist (part-time)	Ms. Alison Hay Mr. Lynd Matt Ms. Lois Murphey Ms. Suzette Phillips vacant
ADMINISTRATIVE SERVICES	
Assistant Treasurer Manager, Human Resources Accountant Manager, Information Technology Accountant	Ms. Alice Claps Ms. Lynn Clark Ms. Sue F. Lee Mr. Jamie F. Reamer Jr. Ms. Patricia Superville
DIOCESAN LEADERSHIP TEAM	
Bishop of Diocese Bishop Suffragan Bishop Suffragan Canon to the Ordinary	The Right Rev. M. Thomas Shaw III SSJE The Right Rev. Roy F. Cederholm, Jr. The Right Rev. Gayle Elizabeth Harris The Rev. Canon Mally Ewing Lloyd

