

# PROPOSED 2014 DIOCESAN BUDGET

DIOCESAN CONVENTION, NOVEMBER 2, 2013  
CATHEDRAL CHURCH OF ST. PAUL, BOSTON



EPISCOPAL DIOCESE OF MASSACHUSETTS

*Answering God's urgent call. Together.*

## **Proposed 2014 Diocesan Budget**

**The 228th Annual Convention of the Episcopal Diocese of Massachusetts  
Cathedral Church of St. Paul, Boston  
November 2, 2013**



### **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.



## Table of Contents

Letter from the Treasurer and Budget Committee Chairperson.....	5
Budget Overview.....	7
Summary of Core Budget.....	8
Summary of Supplemental Budget.....	9
Summary of Functional Expenses by Type.....	10
2014 Proposed Assessments by Deanery.....	11
Projected Revenue for 2014.....	15
Structure of Diocesan Operations.....	18
Projected Expenses for 2014 by Areas of Operation.....	19
Deaneries, Congregations and Clergy.....	20
Congregational Resources and Training.....	24
Strategic Ministries.....	28
Episcopal and Diocesan Support.....	34
Administrative Services.....	38
Proceeds from Closed Congregations: Additional Information.....	40
Together Now Campaign: Additional Information.....	42
Appendix 1: 2014 Endowment Spending Policy Revenue.....	45
Appendix 2: 2014 Trust Income.....	46
Appendix 3: Grants to Congregations in 2012.....	47
Appendix 4: Staff Roster.....	50





## The Episcopal Diocese of Massachusetts

Dear Friends in Christ,

As those responsible for presenting the diocesan budget to the Diocesan Council and, upon its approval, to the Diocesan Convention, we consider it a privilege to serve you and support the work of the Diocese of Massachusetts. We are grateful to Bishop Shaw, Bishop Harris, the Rev. Canon Mally Lloyd, chief business officer Rick Strout, the Budget Committee, ministry area leaders, diocesan staff and the members of Diocesan Council for their work and guidance once again this year.

A budget reflects the perceived priorities which we believe God is calling us to establish in the coming year, bearing in mind that it is God's abundance over which we have been given stewardship. A budget is also inevitably imperfect and incomplete due to human limitations. We believe our work in preparing this budget represents a good faith effort to provide financial support to the greatest effect possible. As required by canon, the budget is balanced and reflects the diocesan mission strategy.

Two special tasks involve the work of the Budget Committee at this time.

One is the oversight (together with the Standing Committee and the Diocesan Council) of the costs associated with the Discernment Committee and Transition Committee work in electing a bishop coadjutor for our diocese. Funds for this purpose have not been set aside from previous years and need to be resourced over the coming budget years.

Another special task is to work with the project manager for campaign initiatives, the Rev. Sam Rodman, and others regarding oversight of that portion of the expenditures from the successful Together Now campaign which are focused on the strengthening of congregations and the creation of hub ministries in the coming years. We have had initial meetings this fall and will be working closely with diocesan staff as projects growing from the campaign continue to emerge.

In the coming year, we hope to use the diocesan Web site to provide more and easily accessible information about the budget process and the budget itself so that interested people can offer responses throughout the process. We continue to welcome you to our monthly meetings at the diocesan offices at 138 Tremont Street in Boston and, as always, welcome your feedback, comments, observations and participation.

Faithfully yours,

Lisa Garcia, Treasurer

The Rev. Stephen Voysey, Chairperson, Budget Committee



## Budget Overview

### Process

The Budget Committee, established by Diocesan Council to help prepare the annual budget, met monthly and held three open hearings in the spring—one meeting about all aspects of the diocese's finances and budget, and two to hear from representatives of strategic ministries. Attendance at the main budget meeting was sparse again this year, with four people attending who were not Budget Committee or staff members. Funding for communications, the Together Now campaign and the use of proceeds from the sale of closed churches were discussed. The bishops' funding priorities and input from staff and ministry area leaders also informed the preparation of this budget, as did the participation of Diocesan Council and the Financial Advisory Committee in discussions about budget issues and/or specific drafts.

### **Core and Supplemental Budgets**

The distinction between the core and supplemental budgets was introduced with the 2009 budget and was presented both in terms of funding sources and of the nature of the programs funded. Here is the excerpt from the 2009 budget book (page 8):

*This year's presentation...separates the overall consolidated budget into several distinct pieces: a core operating budget, funded through assessments and investment income, and several supplements funded through alternative sources, including gifts, grants, reserves and contributions from the Bishop's discretionary funds.*

*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.*

The basic definition of the core budget as limited to revenue from assessments, congregational contributions in lieu of assessment, regular spending policy draws from endowments and trusts and other predictable investment income continues to serve us well. These are truly the revenue streams enabled in a broader sense by the congregations of the diocese, and the spending side of the core budget forces us to identify the programs and activities that should be supported by these funds. The supplemental budget should capture all other spending that the diocese should claim as its own.

The primary distinction between core and supplemental is driven by the source of revenue, not the programs or cost centers involved. In practice, most cost centers will be entirely funded either through the core budget or through the supplemental budget; however, some cost centers will be supported through both budgets. Some turnover should be expected in the composition of programs funded through core revenue.

## Summary of Core Budget

	2014 Budget	2013 Budget	Difference	2012 Actuals
<u>Revenues</u>				
Gross assessments	4,915,837	4,872,043	43,794	4,881,513
Less: reserve for uncollectible assessments	(100,000)	(50,000)	(50,000)	(164,494)
Less: adjustments from Assessments Adjustments Committee	(30,000)	(100,000)	70,000	(50,000)
Net assessments revenue	4,785,837	4,722,043	63,794	4,667,019
Trust fund draws	715,673	685,326	30,347	666,985
Agency fund draws	876,717	826,464	50,253	811,992
Congregational contributions	50,000	50,000	-	50,000
Interest income	20,168	22,286	(2,118)	44,912
Dividend income	60,000	35,000	25,000	80,945
Total revenue	6,508,395	6,341,119	167,276	6,321,853
		Percentage change	2.6%	
<u>Expenses</u>				
Deaneries, congregations & clergy (1000's)	847,841	841,922	5,919	847,252
Congregational, resources and training (2000's)	1,069,598	1,117,646	(48,048)	845,490
Strategic ministries (3000's)	1,238,994	1,093,382	145,612	1,137,404
Episcopal and Diocesan support (4000's)	2,104,461	2,105,212	(751)	1,929,131
Administrative services (5000's)	1,247,501	1,182,957	64,544	1,406,126
	6,508,395	6,341,119	167,276	6,165,403
Net surplus (deficit)	-	-	-	156,450

## Summary of Supplemental Budget

		2014 Budget	2013 Budget	2012 Actuals
<b>Revenues</b>				
Distributions from closed parish net proceeds	{a}	213,550	157,500	244,376
Annual fund	{b}	326,000	300,000	233,005
Grants from Bishop's Discretionary Funds (BDF)	{c}	508,467	565,319	537,460
Other contributions and grant income	{d}	607,146	693,581	159,835
<b>Total revenue</b>		<b>1,655,163</b>	<b>1,716,400</b>	<b>1,174,676</b>

<b>Expenses</b>				
Deaneries, congregations & clergy (1000's)		134,900	136,900	116,544
Congregational, resources and training (2000's)		73,900	80,000	69,052
Strategic ministries (3000's)		1,251,422	1,184,500	908,356
Episcopal and Diocesan support (4000's)		194,941	315,000	237,174
Administrative services (5000's)		-	-	-
		<b>1,655,163</b>	<b>1,716,400</b>	<b>1,331,126</b>
<b>Net surplus (deficit)</b>		<b>-</b>	<b>-</b>	<b>(156,450)</b>

### Details of {a} through {d} revenue lines

	2014 Budget	2013 Budget		2014 Budget	2013 Budget
<b>{a} Distributions from Closed Parish Net Proceeds</b>					
Congregational program grants - Saugus	50,000	50,000			
Watertown, Good Shepherd	70,000	70,000			
Brockton	93,550	-			
Belmont funds, urban resident	-	37,500			
	<b>{a} 213,550</b>	<b>157,500</b>			
<b>{b} Annual fund allocation (gross)</b>					
Life together	125,000	105,500			
B PEACE	40,000	-			
B SAFE	125,000	100,000			
Kids in Community - Lynn	10,000	-			
Youth ministry	-	15,000			
Urban residents	-	37,500			
Development (direct costs of annual fund)	26,000	42,000			
	<b>{b} 326,000</b>	<b>300,000</b>			
<b>{c} Allocation of grants from BDF's</b>					
Sabbaticals	17,500	17,500			
Continuing education	10,000	8,000			
Clergy dependent scholarships	35,000	43,000			
Commission on Ministry	25,000	25,000			
Clergy conference	10,000	10,000			
Life together	57,026	-			
B Safe	100,000	125,000			
St Mary's Dorchester	20,000	-			
Cathedral Church	65,000	60,000			
Bishops' missions	26,000	-			
Kids in Community - Lynn	-	3,819			
Compensation increases	-	18,000			
Development department	142,941	255,000			
	<b>{c} 508,467</b>	<b>565,319</b>			
			<b>{d} Other contributions and grant income</b>		
			Boston Cantonese fundraising	88,000	98,000
			Other development contributions	92,846	-
			Other trust fund draws	2,400	8,581
			Lilly grant to fund Making Excellent Disciples	25,000	24,000
			Life together fees and revenue	375,000	486,000
			Collections from Bsp visitations	10,000	7,000
			Family camp fees	13,900	20,000
			Jubilee grants/fundraising	-	50,000
			<b>{d} 607,146</b>	<b>693,581</b>	

## Summary of Functional Expenses by Type

	2014		Core Budget 2013		2012	
	Budget	% of total	Budget	% of total	Actual	% of total
Program expenses	2,353,871	36%	2,343,593	37%	2,041,870	33%
Compensation and benefits	2,862,876	44%	3,027,947	48%	2,787,442	45%
Operational and support services	1,268,425	19%	1,075,160	17%	1,232,802	20%
Management and professional services	244,723	4%	195,419	3%	302,951	5%
<b>Total expenses</b>	<b>6,729,895</b>	<b>103%</b>	<b>6,642,119</b>	<b>105%</b>	<b>6,365,065</b>	<b>103%</b>
Less fees and other transfers	(221,500)	-3%	(301,000)	-5%	(199,662)	-3%
<b>Net functional expenses</b>	<b>6,508,395</b>	<b>100%</b>	<b>6,341,119</b>	<b>100%</b>	<b>6,165,403</b>	<b>100%</b>

  

	2014		Supplemental Budget 2013		2012	
	Budget	% of total	Budget	% of total	Actual	% of total
Program expenses	924,450	56%	821,400	48%	1,014,545	76%
Compensation and benefits	609,073	37%	722,000	42%	530,478	40%
Operational and support services	413,440	25%	173,000	10%	296,715	22%
Management and professional services	1,200	0%	-	0%	2,430	0%
<b>Total expenses</b>	<b>1,948,163</b>	<b>118%</b>	<b>1,716,400</b>	<b>100%</b>	<b>1,844,168</b>	<b>139%</b>
Add transfers / revenue offsets	(293,000)	-18%	-	0%	(513,042)	-39%
<b>Net functional expenses</b>	<b>1,655,163</b>	<b>100%</b>	<b>1,716,400</b>	<b>100%</b>	<b>1,331,126</b>	<b>100%</b>

**2014 ASSESSMENTS BY DEANERY**

Key to selected columns:

**M?** "M" if a mission  
**EFFECTIVE RATE** the 2014 assessment divided by the 2014 BASE, expressed as a percent  
**TRANSITION ADJUSTMENT** an adjustment negotiated by this year's assessment coordinating committee

**ALEWIFE**

M?	CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
2010	Church of Our Saviour	Arlington	10,380	9.8%	105,680	0	13,949	5,000	-3,569
2015	St. John's Church	Arlington	21,666	12.1%	178,494	0	23,371	0	-1,705
2025	St. Paul's Church	Bedford	19,551	11.9%	164,846	0	20,367	0	-816
2030	All Saints' Church	Belmont	22,006	12.2%	180,684	0	26,528	0	-4,522
2045	St. Mark's Church	Burlington	9,012	9.3%	96,853	0	12,251	0	-3,239
2050	Christ Church	Cambridge	97,183	14.6%	665,702	0	109,379	0	-12,196
2055	St. Bartholomew's Church	Cambridge	17,873	11.6%	154,021	0	17,157	0	716
2060	St. James's Church	Cambridge	49,647	13.8%	359,017	0	43,963	0	5,684
2065	St. Peter's Church	Cambridge	34,042	13.2%	258,336	0	34,289	0	-247
2085	Church of Our Redeemer	Lexington	46,111	13.7%	336,202	0	46,715	0	-604
2135	St. James's Church	Somerville	3,556	5.8%	61,656	0	1,730	0	1,826
2145	Christ Church	Waltham	19,697	11.9%	165,791	0	18,154	0	1,543
2150	Church of the Good Shepherd	Watertown	8,818	9.2%	95,601	0	8,442	0	376
<b>TOTALS:</b>			<b>359,542</b>	<b>12.7%</b>	<b>2,822,883</b>	<b>0</b>	<b>380,612</b>	<b>5,000</b>	<b>-21,070</b>

**BOSTON-HARBOR**

M?	CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
4035	Church of St. Augustine & St. Martin	Boston	11,796	10.3%	114,818	0	11,487	0	309
4045	Church of St. John the Evangelist	Boston	0	0.0%	23,759	0	28,511	0	-28,511
4010	Church of the Advent	Boston	142,839	14.9%	960,255	0	136,780	0	6,059
4025	Emmanuel Church	Boston	36,263	13.3%	272,670	0	33,417	0	2,846
4070 M	St. Stephen's Church	Boston	794	1.7%	46,396	0	1,653	0	-859
4075	Trinity Church	Boston	358,850	15.2%	2,353,875	0	298,080	0	60,770
1030	St. John's Church	Charlestown	19,127	11.8%	162,110	0	19,502	0	-375
4055	St. Mark's Church	Dorchester	16,193	120.0%	13,494	0	3,083	0	13,110
4060	St. Mary's Church	Dorchester	5,735	7.6%	75,711	0	13,494	0	-7,759
3020	St. John's Church	Jamaica Plain	21,942	12.2%	180,275	0	20,524	0	1,418
4040	St. Cyprian's Church	Roxbury	16,080	120.0%	13,400	0	13,400	0	2,680
4050	St. John St. James Church	Roxbury	9,645	9.6%	100,936	0	8,364	0	1,281
<b>TOTALS:</b>			<b>639,264</b>	<b>14.8%</b>	<b>4,317,699</b>	<b>0</b>	<b>588,295</b>	<b>0</b>	<b>50,969</b>

**CAPE-AND-ISLANDS**

M?	CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
6005	St. Mary's Church	Barnstable	60,493	14.1%	428,990	0	55,891	0	4,602
6010	St. Peter's Church	Buzzards Bay	11,681	10.2%	114,077	0	12,745	0	-1,064
6015	St. Christopher's Church	Chatham	72,779	14.3%	508,254	0	73,191	0	-412
6020	St. Andrew's Church	Edgartown	36,074	13.3%	271,451	0	37,836	0	-1,762
6030	St. Barnabas's Church	Falmouth	65,433	14.2%	460,863	0	62,787	0	2,646
6040	Christ Church	Harwich Port	36,772	13.3%	275,954	0	35,524	0	1,248
6045	St. Paul's Church	Nantucket	58,446	14.1%	415,783	0	55,563	0	2,883
6050	Trinity Church	Oak Bluffs	0	0.0%	22,831	0	0	0	0
6055	Church of the Holy Spirit	Orleans	66,041	14.2%	464,785	0	61,798	0	4,243
6060	St. Peter's Church	Osterville	56,209	14.0%	401,349	0	56,454	0	-245
6065	Christ Church	Plymouth	39,521	13.5%	293,688	0	40,220	0	-699
6070	Church of St. Mary of the Harbor	Provincetown	19,632	11.9%	165,371	0	19,827	0	-195
6075	St. John's Church	Sandwich	36,486	13.3%	274,105	0	38,171	0	-1,685
6095	St. David's Church	South Yarmouth	30,896	13.0%	238,045	0	32,091	0	-1,195
6080	Grace Church	Vineyard Haven	39,009	13.4%	290,387	0	35,967	0	3,042
6085	Church of the Good Shepherd	Wareham	25,747	12.6%	204,821	0	24,317	0	1,430
6090	St. James the Fisherman Church	Wellfleet	0	0.0%	17,339	0	0	0	0
6025	Church of the Messiah	Woods Hole	29,331	12.9%	227,944	0	29,958	0	-627
<b>TOTALS:</b>			<b>684,550</b>	<b>13.5%</b>	<b>5,076,037</b>	<b>0</b>	<b>672,340</b>	<b>0</b>	<b>12,210</b>

**2014 ASSESSMENTS BY DEANERY**

**CHARLES-RIVER**

M? CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
		FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
3120 Parish of the Messiah	Auburndale	11,744	10.3%	114,482	0	9,734	3,500	2,010
3030 All Saints Parish	Brookline	54,580	14.0%	390,841	0	49,786	0	4,794
3035 Church of Our Saviour	Brookline	43,774	13.6%	321,123	0	43,774	0	0
3045 St. Paul's Church	Brookline	37,842	13.4%	282,854	0	36,230	0	1,612
3125 Church of the Redeemer	Chestnut Hill	119,118	14.8%	807,216	0	117,369	0	1,749
3060 St. Dunstan's Church	Dover	35,670	13.3%	268,841	0	30,345	0	5,325
3105 Christ Church	Needham	61,849	14.1%	437,736	0	59,905	0	1,944
3145 Trinity Church	Newton Centre	34,887	13.2%	263,789	0	37,164	0	-2,277
3135 Parish of St. Paul	Newton Highlands	23,713	12.4%	191,699	0	22,311	0	1,402
3140 St. Mary's Church	Newton Lower Falls	46,367	13.7%	337,858	0	44,104	0	2,263
3110 Grace Church	Newton	40,936	13.5%	302,815	0	46,460	0	-5,524
3130 St. John's Church	Newtonville	13,148	10.6%	123,536	0	12,301	0	847
3115 Church of the Good Shepherd	Waban	50,165	13.8%	362,361	0	50,182	0	-17
3165 St. Andrew's Church	Wellesley	132,141	14.8%	891,235	0	124,273	0	7,868
<b>TOTALS:</b>		<b>705,934</b>	<b>13.9%</b>	<b>5,096,386</b>	<b>0</b>	<b>683,938</b>	<b>3500</b>	<b>21,996</b>

**CONCORD-RIVER**

M? CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
		FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
2005 Church of the Good Shepherd	Acton	33,539	13.1%	255,093	0	35,156	0	-1,617
2020 St. Andrew's Church	Ayer	13,290	10.7%	124,452	0	16,648	0	-3,358
2075 Trinity Church	Concord	91,825	14.5%	631,131	0	94,875	0	-3,050
3065 St. Andrew's Church	Framingham	32,918	13.1%	251,090	0	37,158	0	-4,240
3075 St. Michael's Church	Holliston	19,468	11.8%	164,312	0	18,694	0	774
3080 St. Paul's Church	Hopkinton	6,921	8.3%	83,363	0	20,591	0	-13,670
2080 St. Luke's Church	Hudson	4,676	6.8%	68,880	0	4,966	0	-290
2090 St. Anne's in-the-Fields Church	Lincoln	80,015	14.4%	554,936	0	77,372	0	2,643
3100 St. Paul's Church	Natick	54,571	14.0%	390,783	0	51,000	0	3,571
2120 M St. David's Mission	Pepperell	2,946	4.4%	67,222	0	1,117	0	1,829
2125 Trinity Chapel	Shirley	0	0.0%	38,345	0	3,111	0	-3,111
3155 St. Mark's Church	Southborough	36,780	13.3%	276,006	0	36,910	0	-130
2140 St. Elizabeth's Church	Sudbury	50,018	13.8%	361,412	0	48,734	0	1,284
2155 Church of the Holy Spirit	Wayland	30,403	12.9%	234,862	0	29,231	0	1,172
2165 St. Peter's Church	Weston	64,000	14.2%	451,614	0	67,618	0	-3,618
<b>TOTALS:</b>		<b>521,370</b>	<b>13.2%</b>	<b>3,953,501</b>	<b>0</b>	<b>543,181</b>	<b>0</b>	<b>-21,811</b>

**MERRIMACK-VALLEY**

M? CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
		FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
1005 St. James's Church	Amesbury	13,825	10.8%	127,907	0	12,741	0	1,084
1010 Christ Church	Andover	73,796	14.3%	514,818	0	79,819	0	-6,023
2070 All Saints' Church	Chelmsford	34,521	13.2%	261,430	0	26,409	0	8,112
1055 St. James's Church	Groveland	13,930	10.8%	128,586	0	13,382	0	548
1065 Trinity Church	Haverhill	27,599	12.7%	216,773	0	33,183	6,000	-5,584
1075 Grace Church	Lawrence	14,789	11.0%	134,123	0	14,610	0	179
2095 St. Anne's Church	Lowell	29,446	12.9%	228,684	0	20,172	0	9,274
2100 St. John's Church	Lowell	2,553	4.6%	55,182	0	2,636	0	-83
1125 St. Andrew's Church	Methuen	2,617	4.7%	55,598	0	3,572	0	-955
1130 St. Paul's Church	Newburyport	37,661	13.4%	281,690	0	37,617	0	44
1135 St. Paul's Church	North Andover	24,758	12.5%	198,440	0	26,162	0	-1,404
2040 St. Anne's Church	North Billerica	21,981	12.2%	180,525	0	21,674	0	307
1195 M All Saints' Church	West Newbury	9,234	7.2%	128,078	0	0	0	9,234
2160 St. Mark's Church	Westford	9,353	9.4%	99,053	0	9,103	0	250
<b>TOTALS:</b>		<b>316,063</b>	<b>12.1%</b>	<b>2,610,887</b>	<b>0</b>	<b>301,080</b>	<b>6,000</b>	<b>14,983</b>

**2014 ASSESSMENTS BY DEANERY**

**MOUNT-HOPE-BUZZARDS-BAY**

M?	CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
5030	Church of the Good Shepherd	Fairhaven	0	0.0%	30,253	0	0	0	0
5035	Church of the Holy Spirit	Fall River	35,032	13.2%	264,724	0	31,625	0	3,407
5045	St. Luke's Church	Fall River	0	0.0%	26,976	0	0	0	0
5070	St. Gabriel's Church	Marion	47,292	13.8%	343,823	0	41,991	0	5,301
5080	Grace Church	New Bedford	76,525	14.4%	532,421	0	79,694	0	-3,169
5085	St. Andrew's Church	New Bedford	4,714	6.8%	69,127	0	4,378	0	336
5090	St. Martin's Church	New Bedford	7,628	8.7%	87,925	0	6,786	0	842
5110	Church of Our Saviour	Somerset	10,066	9.7%	103,657	0	11,803	0	-1,737
5020	St. Peter's Church	South Dartmouth	6,883	120.0%	5,736	0	5,736	0	1,147
5115	Christ Church	Swansea	24,039	12.4%	193,806	0	22,384	0	1,655
<b>TOTALS:</b>			<b>212,179</b>	<b>12.8%</b>	<b>1,658,448</b>	<b>0</b>	<b>204,397</b>	<b>0</b>	<b>7,782</b>

**MYSTIC-VALLEY**

M?	CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
1035 M	St. Luke's/San Lucas Church	Chelsea	4,907	5.7%	86,202	0	5,855	1,425	-948
1025 M	Grace Church Federated	East Boston	0	#DIV/0!	0	0	0	0	0
1045	Grace Church	Everett	7,443	8.6%	86,731	0	6,331	0	1,112
1095	St. Paul's Church	Lynnfield	19,630	11.9%	165,356	0	20,256	3,100	-626
1105	St. Paul's Church	Malden	10,962	10.0%	109,435	0	8,456	0	2,506
2115	Grace Church	Medford	37,126	13.3%	278,238	0	31,315	0	5,811
1120	Trinity Parish	Melrose	24,539	12.5%	197,029	0	22,878	0	1,661
1145	Church of the Good Shepherd	Reading	15,346	11.1%	137,722	0	26,474	0	-11,128
1170	St. John's Church	Saugus	5,976	7.7%	77,266	0	13,397	0	-7,421
1175	All Saints' Church	Stoneham	3,345	5.5%	60,294	0	3,108	0	237
1190	Emmanuel Church	Wakefield	16,037	11.3%	142,178	0	15,874	0	163
2170	St. Elizabeth's Church	Wilmington	3,184	5.4%	59,256	1,000	4,812	0	-1,628
2175	Parish of the Epiphany	Winchester	88,878	14.5%	612,120	0	84,086	0	4,792
1200	St. John's Church	Winthrop	11,417	10.2%	112,369	0	8,862	0	2,555
2180	Trinity Church	Woburn	5,948	7.7%	77,086	1,648	4,276	0	1,672
<b>TOTALS:</b>			<b>254,738</b>	<b>11.6%</b>	<b>2,201,282</b>	<b>2,648</b>	<b>255,980</b>	<b>4,525</b>	<b>-1,242</b>

**NEPONSET-RIVER**

M?	CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
4085	Trinity Church	Canton	16,171	11.3%	143,043	0	16,384	0	-213
3050	Church of the Good Shepherd	Dedham	7,020	8.4%	84,002	0	7,504	0	-484
3055	St. Paul's Church	Dedham	42,818	13.6%	314,960	0	40,280	0	2,538
4015	Parish of All Saints	Dorchester	48,322	13.8%	350,468	0	48,616	0	-294
3005	Christ Church	Hyde Park	7,471	8.6%	86,912	0	0	0	7,471
3015 M	Iglesia de San Juan	Hyde Park	0	0.0%	9,314	0	0	0	0
4030	Church of the Holy Spirit	Mattapan	20,353	12.0%	170,021	0	22,822	0	-2,469
3085	Church of the Advent	Medfield	19,748	11.9%	166,122	0	23,962	0	-4,214
3090	Christ Church	Medway	5,914	7.7%	76,870	0	5,483	0	431
4130	St. Michael's Church	Milton	66,522	14.2%	467,888	0	61,761	0	4,761
3150	Grace Church	Norwood	10,020	9.7%	103,361	0	10,600	0	-580
5105	St. John's Church	Sharon	0	0.0%	38,494	0	585	0	-585
4160	Trinity Church	Stoughton	8,664	9.2%	94,608	0	7,861	0	803
3160	Epiphany Church	Walpole	20,312	12.0%	169,756	0	19,905	0	407
3010	Emmanuel Church	West Roxbury	4,725	6.8%	69,197	0	5,038	0	-313
3170	St. John's Church	Westwood	17,241	11.5%	149,948	0	22,507	0	-5,266
<b>TOTALS:</b>			<b>295,301</b>	<b>11.8%</b>	<b>2,494,964</b>	<b>0</b>	<b>293,308</b>	<b>0</b>	<b>1,993</b>

**2014 ASSESSMENTS BY DEANERY**

**NORTH-SHORE**

M? CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
		FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
1015	St. John's Church	73,909	14.3%	515,547	0	71,930	0	1,979
1021	St. Peter's Church	30,442	12.9%	235,114	0	29,864	0	578
1143	All Saints Episcopal Church of the North Shore	13,027	6.3%	206,801	0	0	0	13,027
1050	St. John's Church	25,427	12.5%	202,760	0	29,227	0	-3,800
1070	Ascension Memorial Church	27,115	12.7%	213,647	0	27,105	0	10
1090	St. Stephen's Memorial Episcopal Church	36,563	13.3%	274,601	0	31,297	0	5,266
1116	St. Michael's Church	43,734	13.6%	320,870	0	35,232	0	8,502
1110	Wyman Memorial Church of St. Andrew	38,660	13.4%	288,133	0	34,292	0	4,368
1155	St. Mary's Church	18,187	11.7%	156,048	0	18,058	0	129
1160	Grace Church	26,025	12.6%	206,615	0	26,025	0	0
1165	St. Peter's Church	19,308	11.8%	163,279	0	17,682	0	1,626
1060	Christ Church	46,578	13.7%	339,213	0	53,084	0	-6,506
1180	Church of the Holy Name	17,266	11.5%	150,108	0	15,642	0	1,624
1185	Trinity Church	28,014	12.8%	219,451	0	29,196	0	-1,182
<b>TOTALS:</b>		<b>444,255</b>	<b>12.7%</b>	<b>3,492,187</b>	<b>0</b>	<b>440,918</b>	<b>0</b>	<b>3,337</b>

**SOUTH-SHORE**

M? CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
		FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
4080	Emmanuel Church	11,460	10.2%	112,648	0	10,205	0	1,255
4090	St. Stephen's Church	48,881	13.8%	354,077	0	50,251	0	-1,370
4095	Church of St. John the Evangelist	45,755	13.7%	333,908	0	20,306	0	25,449
4100	St. Andrew's Church	21,237	12.1%	175,729	0	18,775	0	2,462
4105	Parish of St. John the Evangelist	71,348	14.3%	499,021	0	66,858	0	4,490
4110	St. John's Church	6,263	7.9%	79,118	0	5,664	0	599
4120	Trinity Church	17,565	11.6%	152,038	0	16,691	0	874
4125	Church of Our Saviour	11,912	10.3%	115,565	0	14,078	0	-2,166
4135	Christ Church	18,836	11.8%	160,233	0	19,699	0	-863
4140	Parish of St. Chrysostom	18,701	11.7%	159,362	0	20,735	5,325	-2,034
4145	Trinity Church	6,808	8.2%	82,634	0	6,206	0	602
4150	Trinity Church	4,434	6.6%	67,317	0	4,384	0	50
4155	St. Luke's Church	32,335	13.1%	247,327	0	29,880	0	2,455
4165	Church of the Holy Nativity	17,756	11.6%	153,266	0	13,795	0	3,961
5130	All Saints' Church	7,238	8.5%	85,409	0	10,874	0	-3,636
<b>TOTALS:</b>		<b>340,529</b>	<b>12.3%</b>	<b>2,777,652</b>	<b>0</b>	<b>312,948</b>	<b>5,325</b>	<b>27,581</b>

**TAUNTON-RIVER**

M? CHURCH	LOCATION	2014		2014 BASE	ADJUSTMENT	2013		Difference
		FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments	
5005	All Saints' Church	4,956	7.0%	70,685	1,138	4,423	1,023	533
5010	Trinity Church	8,217	9.0%	91,724	0	7538	0	679
5060	St. Mark's Church	22,306	12.2%	182,623	10,000	26299	14,000	-3,993
3070	St. John's Church	9,915	9.7%	102,678	0	7418	0	2,497
5065	Church of St. John the Evangelist	2,946	5.1%	57,720	0	3957	0	-1,011
5075	Church of Our Saviour	15,548	11.2%	139,024	0	23444	0	-7,896
5095	Grace Church	21,642	12.1%	178,337	0	21296	0	346
5025	St. Mark's Church	902	2.0%	44,531	0	0	0	902
5120	St. John's Church	4,971	7.0%	70,784	0	5227	0	-256
5125	St. Thomas's Church	31,981	13.1%	245,045	0	28713	0	3,268
3175	Trinity Church	18,728	11.7%	159,540	0	19325	0	-597
<b>TOTALS:</b>		<b>142,112</b>	<b>10.6%</b>	<b>1,342,691</b>	<b>0</b>	<b>147,640</b>	<b>15,023</b>	<b>-5,528</b>

<b>TOTAL ASSESSMENTS BILLED:</b>	<b>4,915,837</b>	<b>13.0%</b>	<b>37,844,617</b>	<b>0</b>	<b>4,824,637</b>	<b>39,373</b>	<b>91,200</b>
<b>less RESERVES:</b>	<b>(100,000)</b>						
<b>ASSESSMENTS (less reserves):</b>	<b>4,815,837</b>						

## Projected Revenue for 2014

### Assessments and Adjustments and Reserves

The 2014 assessment formula, approved by the Diocesan Council, remains unchanged from 2010:

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

*where the BASE for 2014 is equal to line 14 ("all other operating expenses") from the 2011 parochial report, less line 7 ("assistance from diocese").*

For a mission, the 2014 assessment is two-thirds the amount that would be assessed if the congregation were a parish.

This assessment formula together with the parochial report data for 2011 generates a gross assessment for 2014 of \$4,915,837. Again this year the Diocesan Council created an Assessment Coordinating Committee, whose adjustments to the assessments of four congregations totaled approximately \$14,000, below its authorized cap of \$50,000, as follows:

- St. Mark's Church, Foxborough: \$10,000
- Trinity Church, Woburn: \$1,648
- All Saints' Church, Attleboro: \$1,138
- St. Elizabeth's Church, Wilmington: \$1,000

However, despite coming in below the authorized cap, we have chosen to have the adjustments amount total \$30,000. In sum, the total value of assessments (after adjustments) to be billed in 2014 is \$4,885,837, less a reserve for uncollectible assessments (\$100,000), for a total projected income from assessments of \$4,785,837. In addition to the assessments, revenue also reflects \$50,000 in projected voluntary contributions from two congregations not subject to the assessment.

### Net Revenue from Investments

Approximately 24% of core budget revenue 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 30% 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

The appendix table on page 46 lists the trusts owned and managed by the Trustees of Donations (TOD) for the benefit of the diocese. In 2014 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 2010 through June 2013.

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 actual income produced by the fund, and in other cases, all income must be reinvested for the time being. The table of projected trust income for these funds is an estimate of the income that will be available in 2014.

The total spending policy income available in 2014 (\$715,673) is a slight increase from 2013 (\$685,326). This is because three-year average market values are roughly the same for the two overlapping periods.

#### Spending Policy – Endowments (Agency Funds)

The appendix table on page 45 lists the endowments owned by the diocese and managed primarily by the Trustees of Donations. These include some funds that are unrestricted and others that have a restriction on their use as stipulated by a third party donor at the time the trust was created or stipulated by Diocesan Council.

The proposed spending policy for 2014 is similar to that adopted by the Trustees of Donations: to draw 4% of a base that reflects the average of the market value over the past three years, adjusted for withdrawals from and additions to principal.

The total spending policy income available to the 2014 core budget is \$876,717, which is about \$50,000 more than in 2013.

#### Spending Policy and Core Revenue

At its September meeting, the Financial Advisory Committee voted the following motion:

*The Financial Advisory Committee reaffirms its support of a 4% spending policy draw from diocesan endowment funds to support the 2014 core budget. (The value of each fund for the purpose of calculating the draw is based on the 36 month average, from July 2010 to June 2013, of end of month market value, adjusted for additions and withdrawals.)*

At the same time, 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 treated as supplemental, not core, revenue, thus flagging them as special actions in response to special circumstances. A notable supplemental draw could potentially be taken to cover the expenses of the election of a bishop coadjutor and the transition to a new diocesan bishop.

From a budgeting perspective, the absence of a depreciation charge or an action that adds to a specific capital reserve fund in the core budget is an implicit assumption that capital improvements will be funded through the supplemental budget.

It is possible that some future supplemental 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 this type of supplemental draw.

#### Dividend and Interest Income

More than 40 years ago the diocese received a gift of stock with the request that it not be sold. The dividend income for 2014 is projected to be \$60,000. In addition, the inclusion of \$20,168 in interest income represents the income to be earned and collected on a mortgage extended to the bishop suffragan and has an interest rate of 5.2%.

The diocesan portfolio also includes loans to congregations (separate from those made through the Stokes Fund loan program). Two loans are significantly in default; each congregation is

behind at least several years in payments. If the diocese began to receive payments from these loans, the projected interest income and fees would be recorded as income here in the core budget. The congregations and amounts outstanding are:

- St. David's Church, Pepperell (outstanding amount: \$38,935)
- St. Elizabeth's Church, Wilmington (outstanding amount: \$4,803)

A third congregation, Grace Church, North Attleborough, entered into an agreement with the Diocesan Council which involves certain financial and operational incentives in order for the parish to achieve certain milestones. During 2012 Grace Church began repayment of its outstanding loan amount of \$385,393 under this plan. Payments are recorded as a reduction of existing assets. In 2012, the parish paid approximately \$53,000, which resulted in an additional credit of \$14,900 to its balance.

### Supplemental Budget Revenue

The table on page 9 shows both the revenue and the specific expenses for the supplemental budget in each of the following categories. The corresponding revenue and expenses are indicated by a letter in a bracket, e.g. {a} is a draw from the Closed Parish Net Proceeds Fund. The supplemental budget has four sources of revenue:

**{a}** Closed Parish Net Proceeds Fund (Use of Proceeds from Sales of Closed Parishes): The 2014 draw will be \$213,550 to cover congregational grants and to provide seed money to build our ministry in Brockton. The 2013 budget drew \$157,500 from this fund. See the table on page 41 for further information.

**{b}** The Annual Fund: Estimates put the 2014 Annual Fund at \$326,000 to cover strategic ministries serving children, youth and young adults. With \$26,000 needed to cover the direct costs of the Annual Fund, \$300,000 is likely to be available for Annual Fund grants in 2014. The 2013 Annual Fund appeals are budgeted at \$300,000.

**{c}** Grants from Bishop's Discretionary Funds (BDFs): These are trust funds held by the Trustees of Donations where the bishop and the diocese are named as income beneficiaries; some are restricted in use and some are not. The generosity of past donors and the diocesan bishop make it possible to fund new ventures in mission and strategic ministries through the supplemental budget. In 2014 the draw, along with use of prior years' accumulated surpluses, is set at \$508,467 for clergy support and development (from restricted funds), the development office and various strategic ministries; in 2013 the draw was \$565,319. If the Annual Fund comes in above \$326,000, then the grants from the BDF funds will be reduced so the reserve is not further depleted.

Of the many funds owned by the Trustees of Donations, 34 funds with a market value of about \$16.7 million are for the benefit of the diocesan bishop, and the Trustees of Donations provide him with an annual spending policy from these trusts. Bishop Shaw has historically used the bulk of this income to support pilot programs and new initiatives and to supplement strategic ministries. His grants (which comprise about 32% of the overall supplemental budget) are an important source of funding for the supplemental budget. Planned expenditures over the past few years have brought prior years' surplus levels down.

**{d}** Other contributions and grants: Fundraising by the Cantonese and Jubilee ministries, grants and fees make up this category. In 2014 the budget amounts to \$607,146; in 2013 it was budgeted at \$693,581.

### Real Property Spending Policy

The diocese owns several properties, including a residential house at 40 Prescott Street in Brookline which the Life Together program is using to house interns and for its office and meeting space. Normally, the in-kind use of property for diocesan staff functions would not show up in the budget; it would just add in-kind revenue coming in and in-kind expense going out, without any particular relevance to budget choices.

In the subsequent discussion of the Life Together program (see page 28), the annual value of the use of this property is estimated at \$75,000; to offset that expense, this line shows an in-kind spending policy revenue from the use of the property.

### **The Structure of Diocesan Operations**

The structure for diocesan operations is designed to encourage accountability, clarity and collaboration with five functional areas and a diocesan leadership team. The canon to the ordinary, acting as the chief of staff, is responsible for the management of diocesan operations and the controls on the operations that are implemented through the five functional areas. She works with the treasurer to ensure that financial records are reflective of the full resources applied to each individual component of mission strategy implementation.

The **Deaneries, Congregations and Clergy** area has a new director of transition ministries. The congregational development team, along with others from around the diocese, the province and the wider church, is working across areas to promote clergy wellness and congregational vitality and viability.

The **Congregational Resources and Training** area includes grant programs, events, training and communications. A new communications assistant position was created, and an administrator for the grants programs was also hired in 2013 to support the congregational resources and training director as the “green” grants and mission tithe grants programs expand under the Together Now campaign funding.

The **Strategic Ministries** area funds staffing for mission congregations and also for ministries which take place outside of parish settings.

The **Episcopal and Diocesan Support** area contains the governance, canonical, ecumenical and development functions. The development office helped to raise \$20 million for the Together Now campaign. (See page 42 for more campaign information.) The diocesan leadership team—the two bishops and the canon to the ordinary—have broad shared oversight responsibilities for all diocesan operations, assisted by a staff with specific functional responsibilities and directed by the canon to the ordinary.

In the **Administrative Services** area, a new controller has joined the chief business officer and his team for oversight of financial services, human resources and information technology.

## Projected Expenses for 2014 by Areas of Operation

### Guide to Area Expense Tables

The proposed expense budgets for each of the five areas of diocesan operations are described in this section. For each area, there are two pages, one for the core budget and one for the supplemental budget. Each page has two tables: 2012 actuals (top) and the 2014 proposed budget (bottom). The far right-hand column is the 2013 budget for comparative purposes. Each row represents a specific cost center code and description within the area. There are up to 10 columns of figures that include a variety of budgeted and actual expenses. The first row in each area is staff compensation.

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

**Compensation and Benefits:** All compensation and benefit-related expenses, including 1099 payments to independent contractors

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

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

**Revenue Offset:** Revenue collected by the cost center's programs explicitly to offset its costs

**Bishop's Discretionary Fund Grant:** Funds provided to the core or supplemental budget from funds held in trust for the diocesan bishop

**Annual Fund:** Revenue from the Annual Fund appeals to offset expenses

**Transfer:** An internal accounting mechanism to allocate expenses from one budget to another; ie: from supplemental to core and vice versa

**2013 Budget:** The 2013 budget, for comparison purposes

Deaneries, Congregations and Clergy (see tables on pages 22 and 23)

The total 2014 budget for this area is \$982,741, with \$847,841 in the core budget and \$134,900 in the supplemental budget. The 2013 core budget total was \$841,922; this increase is largely due to changes made to staffing and a larger group anticipated for the diaconate program.

Deaneries, Congregations and Clergy: 1000 - Core

This line contains the total compensation costs for five staff members (see roster on page 50).

Deaneries: 1001; Deans: 1002; Deanery Confirmations: 1003 - Core

\$500 per deanery to support deanery assembly activities; \$4,000 per deanery to offset deans' time and expense; and \$8,000 to provide hospitality for Confirmations.

Congregations: 1101 - Core

The \$4,800 in the core budget funds the congregational business consultants program.

Transition Ministries: 1111 - Core

\$13,000 for supporting expenses for the Office of Transition Ministries.

Clergy: 1201 - Core

\$3,000 for support of the two archdeacons.

Sabbaticals: 1211 - Core & Supplemental

\$17,500 funded from the Bishop's Discretionary Fund in the supplemental budget, and \$7,774 from a restricted trust fund in the core budget.

Continuing Education: 1212 - Supplemental

\$10,000 funded from the Bishop's Discretionary Fund.

MSASA EDS: 1213 - Core

\$9,798 is the spending policy income available for a scholarship program for students from Africa attending Episcopal Divinity School.

Clergy Dependent Scholarships: 1221 - Supplemental

\$35,000 from the Bishop's Discretionary Fund.

Dill Campership: 1223 - Supplemental

\$2,400 representing the spending policy income from a restricted bishop's discretionary fund to support a scholarship to Camp O-At-Ka in Maine.

Support for Retired Clergy: 1231 - Core

\$5,200 is for program and support expenses for retired clergy, including gatherings. Separate from the core budget amount of \$5,200, 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.

Commission on Ministry: 1311 - Core & Supplemental

The total cost for this program is budgeted at \$92,000, of which \$50,000 has been again set aside, at the bishop's request, for the Commission on Ministry's priority to fund seminarians whose first language is not English. One half of this \$50,000 initiative is funded from the core budget and half from the supplemental.

Seminarians: 1312 - Core & Supplemental

Scholarships for seminarians in the ordination process—\$47,703 is the spending policy income from a restricted fund for this purpose, supplemented by an estimated additional \$10,000 to be raised through bishops' visitations to congregations.

Fresh Start Program: 1321 - Core

A decrease of \$5,000 to \$5,000 in 2014, based on 2012 actuals.

Diaconate Program: 1331 - Core

The full cost of running the diaconate program has increased by \$7,000 from 2013 to \$20,000, based on the projected participation.

Clergy Family Network: 1341 - Core

\$1,000 in the core budget, based on 2012 actuals.

Pre-Lenten Retreat: 1411 - Core

Net costs to the core budget, after fees are budgeted at \$3,000, based on 2012 actuals.

Clergy Conference: 1421 - Core & Supplemental

This three-day event is budgeted at \$113,000, of which \$61,000 is covered by attendee fees and \$10,000 by the supplemental budget; the balance (\$42,000) is covered by the core budget.

Clergy Day: 1431 - Core

Clergy Day at the Barbara C. Harris Camp and Conference Center is budgeted at \$6,000, of which \$5,000 is covered by fees, leaving a core budget balance of \$1,000.

**Deaneries, Congregations & Clergy  
2014 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<b>2012 Actual</b>						
CC1000 Deaneries, Congregations & Clergy	-	569,525	4,558	-	-	574,083
CC1001 Deaneries	2,657	-	2,693	-	-	5,350
CC1002 Deans	48,000	-	-	-	-	48,000
CC1003 Deanery Confirmations	4,055	-	3,332	-	-	7,387
CC1101 Congregations	-	-	3,475	2,105	(884)	4,696
CC1111 Transition Ministries	5,000	-	7,597	-	-	12,597
CC1201 Clergy	-	-	1,780	-	-	1,780
CC1213 MSASA EDS	1,078	-	-	-	-	1,078
CC1311 Commission on Ministry	29,472	6,597	27,169	15,754	(10,333)	68,659
CC1312 Seminararians	42,170	400	-	-	-	42,570
CC1321 Fresh Start Program	-	-	3,279	-	-	3,279
CC1331 Diaconate Program	397	8,925	9,991	2,720	(2,320)	19,713
CC1341 Clergy Family Network	-	-	-	-	-	-
CC1411 Pre Lenten Retreat	48	-	5,155	1,759	(3,338)	3,624
CC1421 Clergy Conference	10,312	1,700	99,966	1,706	(60,145)	53,539
CC1431 Clergy Day	-	113	5,642	67	(4,925)	897
<b>Totals</b>	<b>143,189</b>	<b>587,260</b>	<b>174,637</b>	<b>24,111</b>	<b>(81,945)</b>	<b>847,252</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<b>2014 Budget</b>						
CC1000 Deaneries, Congregations & Clergy		551,066	4,500			555,566
CC1001 Deaneries	3,000		3,000			6,000
CC1002 Deans	48,000					48,000
CC1003 Deanery Confirmations	4,000		4,000			8,000
CC1101 Congregations			3,500	2,100	(800)	4,800
CC1111 Transition Ministries	5,000		8,000			13,000
CC1201 Clergy			3,000			3,000
CC1211 Sabbaticals	7,774					7,774
CC1213 MSASA EDS	9,798					9,798
CC1231 Support for Retired Clergy		6,000	5,200			11,200
CC1311 Commission on Ministry	30,000		27,000	15,000	(11,000)	66,000
CC1312 Seminararians	47,703					47,703
CC1321 Fresh Start Program		9,000	5,000			14,000
CC1331 Diaconate Program			10,000	3,000	(2,000)	11,000
CC1341 Clergy Family Network	1,000		4,600	1,800	(3,400)	3,000
CC1411 Pre Lenten Retreat		2,000	100,000	1,000	(61,000)	42,000
CC1421 Clergy Conference			6,000		(5,000)	1,000
CC1431 Clergy Day						
<b>Totals</b>	<b>156,275</b>	<b>568,066</b>	<b>183,800</b>	<b>22,900</b>	<b>(83,200)</b>	<b>847,841</b>
						<b>841,922</b>

**Deaneries, Congregations & Clergy  
2014 Supplemental Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total Cost</u>	<u>Lilly Grant</u>	<u>BDF Grants</u>	<u>Other Trust Fund Draws</u>	<u>Net Cost</u>
<b>2012 Actual</b>										
CC1101 Congregations - Making Excellent Disciples	41,999	-	214	-	42,213		(42,213)			-
CC1211 Sabbaticals	13,500	-	4,000	1,200	18,700			(18,700)		-
CC1212 Continuing Education	8,129	-	-	-	8,129			(8,129)		-
CC1221 Clergy Dependent Scholarships	41,500	-	-	-	41,500			(15,621)	(25,879)	-
CC1231 Support for Retired Clergy	175	800	6,595	-	7,570			(7,570)		-
CC1312 Seminararians	9,474	-	-	-	(11,042)					(1,568)
<b>Totals</b>	<b>114,777</b>	<b>800</b>	<b>10,809</b>	<b>1,200</b>	<b>(11,042)</b>	<b>116,544</b>	<b>(42,213)</b>	<b>(50,020)</b>	<b>(25,879)</b>	<b>(1,568)</b>
							<u>Less Other Funding Sources</u>			
<b>2014 Budget</b>										
CC1101 Congregations - Making Excellent Disciples	25,000	-	-	-	25,000		(25,000)			-
CC1211 Sabbaticals	13,500	-	4,000	-	17,500			(17,500)		-
CC1212 Continuing Education	10,000	-	-	-	10,000			(10,000)		-
CC1223 Dill Campership	2,400	-	-	-	2,400				(2,400)	-
CC1221 Clergy Dependent Scholarships	35,000	-	-	-	35,000			(35,000)		-
CC1311 Commission on Ministry	25,000	-	-	-	25,000			(25,000)		-
CC1312 Seminararians	10,000	-	-	-	10,000			(10,000)		-
CC1421 Clergy Conference	10,000	-	-	-	10,000			(10,000)		-
<b>Totals</b>	<b>130,500</b>	<b>-</b>	<b>4,000</b>	<b>-</b>	<b>(10,000)</b>	<b>124,500</b>	<b>(25,000)</b>	<b>(97,500)</b>	<b>(2,400)</b>	<b>-</b>
										<b>136,900</b>

Congregational Resources and Training (see tables on pages 26 and 27)

The total 2013 budget for this area is \$1,143,498, with \$1,069,598 in the core budget and \$73,900 in the supplemental budget. The 2013 core budget total was \$1,117,646.

Congregational Resources and Training: 2000 - Core

The total compensation and benefits costs for the six staff members in this area (including the newly created communications assistant position) are \$391,550 (see roster on page 50). Eighty-five percent of the compensation costs for the staff member who works closely with congregations during the closing process is ultimately reimbursed from the closing proceeds. A new position in 2013, grants administrator and support to the congregational development team, is being partially funded from the Together Now campaign and partially from the Congregational Resources and Training core budget to administer the overall diocesan and campaign grants which total approximately \$880,000 per year, and to provide administrative support to the congregational development team, especially in the area of event planning.

Congregational Development Grants: 2011, 2012 - Core

The amounts for the two congregational development grant programs has been reduced by \$20,000 due to decrease in demand, to \$180,000 for the open grants. The targeted grants remain the same at \$70,000.

Bristol County Case Grants: 2013 - Core

The draw for this grant program is \$117,064. 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 - Supplemental

This cost center line contains specific grants to congregations funded either by restricted funds or specific supplemental sources. The net of \$60,000 includes a continuation of the draw from the closed congregation proceeds (Malden) for use by Saugus (\$50,000), and \$10,000 to St. Stephen's Church, Lynn for its KIDS in Community summer program.

Deaf Ministry Grants: 2015 - Core

This cost center represents a continuation, for the time being, of the deaf ministry grants program begun in 2011. The amount budgeted is a 1% draw from the remainder of the diocesan agency fund that in previous years supported the St. Andrew's of the Deaf congregation in Natick, which closed in 2011. The draw is minimal pending the development of a usage policy or a standardized grant request program. The use of the proceeds from this closed congregation will be determined by Diocesan Council.

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

Each of the 12 deaneries is charged with running a grants program to support outreach activities. Deanery assemblies set the criteria and determine awards. The amounts available to each deanery, funded by two specific diocesan funds, are \$4,000 for Sending Serving grants (open to any outreach activity) and \$2,400 for House of Mercy grants (requiring a focus on women and children in need).

Hispanic Ministries: 2031 - Core

The 2014 budget for this grant program to support Hispanic ministries in congregations is \$25,000. An additional \$10,000 pays for the Hispanic missionary.

Green Grants and Loans: 2052 – Together Now Campaign

The 2014 “green” grants and loan programs will be funded through the Together Now campaign (see page 42).

Spring Learning Event: 2112 - Core

The core budget for 2014 is \$6,500, with \$500 in participant fees, for a net expense of \$6,000.

Resource Day: 2113 - Core

The total cost of Resource Day is \$6,000, \$3,500 of which is offset by fees collected.

Workshops: 2131 - Core

The total cost of \$8,000 for the various workshops offered throughout the diocese, \$4,000 of which is offset by fees collected, based on 2012 actuals.

Antiracism: 2132 - Core

A net of \$500 for trainings, raising awareness and education, based on 2012 actuals.

Safe Church: 2133 - Core

A net of \$5,000 for trainings, online and in person, based on 2012 actuals.

Resource Center: 2151 - Core

\$600 to stock and renew the materials in the Resource Center staffed by the missionary for Christian education, formation and discipleship.

Consultants and Coaches: 2161 - Core

\$7,000 for congregational consultants and coaches, and their expenses. They help with best practices in many areas including: finances, buildings, leadership and stewardship. Based on 2012 actuals.

Congregational Resources and Training Support: 2200 - Core

\$42,000, of which \$32,000 is level funding in support of the Leadership Development Initiative.

Congregational Support: 2211 - Core

Much of this total of \$34,000 is legal fees on various parish-related issues throughout the year.

Program Support: 2221 - Core

A net of \$7,000 covers various workshop trainers' fees.

Family Camp: 2222 - Supplemental

Family Camp is a break-even operation.

Committee Support: 2231 - Core

\$11,000 to provide hospitality and support for diocesan committees.

Communications: 2311, 2312, 2313 - Core

The total budget is \$77,000. The \$142,800 which was budgeted for 2013 included the salary and benefits for a second communications staff person. For 2014 that salary has been moved to the 2000 salary line. The new position builds critical capacity in support of a multidimensional, multimedia communications program serving diverse internal and external constituencies.

**Congregational Resources & Training  
2014 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<b>2012 Actuals</b>						
CC2000 Congregational Resources & Training	-	343,321	548	-	-	343,869
CC2011 Cong Dev Open Grants	188,144	-	-	-	-	188,144
CC2012 Cong Dev Targeted Grants	500	-	-	-	-	500
CC2013 Bristol County Case Fund Grants	103,080	-	47	-	-	103,127
CC2015 Deaf Ministry Grants	-	-	-	-	-	-
CC2021 Sending Serving Grants	48,000	-	-	-	-	48,000
CC2022 House of Mercy Grants	17,525	-	-	-	-	17,525
CC2031 Hispanic Ministries	15,151	2,898	124	-	-	18,173
CC2111 Events	-	-	150	-	(130)	20
CC2112 Spring Learning Event	1,672	400	1,886	-	(540)	3,418
CC2113 Resource Day	4,767	800	238	34	(3,630)	2,209
CC2131 Workshops	-	-	441	55	(3,042)	(3,042)
CC2132 Anti-Racism	-	-	396	-	(295)	101
CC2133 Safe Church	227	3,772	2,741	-	(1,785)	4,955
CC2151 Resource Center	21	-	469	-	-	490
CC2161 Consultants and Coaches	105	1,200	6,316	-	(466)	7,155
CC2200 Support	36,161	6,800	3,049	-	-	46,010
CC2211 Congregation Support	-	150	3,337	32,619	(200)	35,906
CC2221 Program Support	7,000	1,500	435	-	(1,985)	6,950
CC2231 Committee Support	-	-	1,327	-	-	1,327
CC2311 Diocesan Communications	11,431	2,213	5,349	-	(73)	18,920
CC2312 FY Newsletter	-	-	1,733	-	-	1,733
<b>Totals</b>	<b>433,784</b>	<b>363,054</b>	<b>28,586</b>	<b>32,708</b>	<b>(12,642)</b>	<b>845,490</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<b>2014 Budget</b>						
CC2000 Congregational Resources & Training	-	-	-	-	-	-
CC2011 Cong Dev Open Grants	180,000	391,550	500	-	-	572,050
CC2012 Cong Dev Targeted Grants	70,000	-	-	-	-	70,000
CC2013 Bristol County Case Fund Grants	117,064	-	-	-	-	117,064
CC2015 Deaf Ministry Grants	2,000	-	-	-	-	2,000
CC2021 Sending Serving Grants	48,000	-	-	-	-	48,000
CC2022 House of Mercy Grants	28,884	-	-	-	-	28,884
CC2031 Hispanic Ministries	25,000	10,000	-	-	-	35,000
CC2112 Spring Learning Event	4,000	500	2,000	-	(500)	6,000
CC2113 Resource Day	5,000	1,000	-	-	(3,500)	2,500
CC2131 Workshops	7,500	-	500	-	(4,000)	4,000
CC2132 Anti-Racism	500	-	-	-	-	500
CC2133 Safe Church	-	4,000	2,500	-	(1,500)	5,000
CC2151 Resource Center	500	1,000	600	-	-	1,600
CC2161 Consultants and Coaches	-	-	5,500	-	-	5,500
CC2171 Practice Areas	-	-	-	-	-	-
CC2200 Support	32,000	7,000	3,000	-	-	42,000
CC2211 Congregation Support	25,000	500	3,500	5,000	-	34,000
CC2221 Program Support	7,000	1,500	500	-	(2,000)	7,000
CC2231 Committee Support	-	-	11,000	-	-	11,000
CC2311 Diocesan Communications	-	-	75,000	-	-	75,000
CC2312 FY Newsletter	-	-	2,000	-	-	2,000
CC2313 Episcopal Times	-	-	-	-	-	-
<b>Totals</b>	<b>552,448</b>	<b>417,050</b>	<b>106,600</b>	<b>5,000</b>	<b>(11,500)</b>	<b>1,069,598</b>
						<b>1,117,646</b>



Strategic Ministries (see tables on pages 32 and 33)

The total 2014 budget for this area is \$2,471,866, with \$1,238,994 in the core budget and \$1,251,422 in the supplemental budget. The 2013 core budget total was \$1,093,382.

Strategic Ministries: 3000

Compensation in this area is allocated to the specific cost centers.

Youth Ministry: 3011 - Core

The core budget for the diocesan youth ministry includes the compensation and benefits for the director of youth ministry plus \$47,000 for program and support expenses, net of \$36,000 in fees collected.

Life Together: 3056 - Core & Supplemental

The Life Together program is the blending of two internship programs: The Micah Project and the more recently developed Relational Evangelism pilot project. Over the last two years, the program directors have made substantial changes and developments to increase both the impact of the internship program in the lives of young people and the diocese and to increase the long-term sustainability of the program. Some of these developments include:

- Increasing revenues from site placement partners
- Increasing revenues from independent fundraising—both through foundation grants and intern participation in program fundraising
- Reducing costs
- Adjusting the length and timing of the program year
- Adjusting the size of the program
- Prioritizing the development of a second-year track

In the 2013-2014 program year, 27 young adults will be affiliated with Life Together, as a part of four different cohorts:

- Emmaus Fellows are second-year fellows based in the greater-Boston area. This cohort is focused on capacity building, working 15 hours per week with Life Together. In addition, they work at nonprofit organizations and churches, focused on social and structural change.
- Micah Fellows are also based in the greater-Boston area. They work at churches and nonprofit organizations. Micah Fellows work for social justice, grow as leaders and live in community with other fellows. They also participate in about eight hours a week of leadership training and spiritual reflection.
- Esperanza Academy Teaching Fellows—This is a partnership between Life Together and Esperanza Academy, located 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, and they live together in intentional community.
- South Coast Mission Hub Fellows—Funded by the Together Now campaign, this is an affiliate program partner with Life Together. The South Coast Mission Hub is a pilot project of the diocese to bring together local churches and engage them in common missional work. The fellows live in Fall River and work at nonprofit organizations and churches in the greater Fall River and New Bedford communities.

Funding:

In the past, the Life Together program (and the Relational Evangelism pilot project) has been funded largely through the supplemental budget. The core budget contributes \$75,000, which is a bit less than the total compensation cost for the program's director. Supplemental resources,

including external grants and contributions, and internal grants from Annual Fund proceeds and from the bishop's discretionary funds provided the bulk of additional funding.

In the 2013-2014 program year, however, Life Together plans to secure substantial funding outside of the diocese and projects a more diverse and balanced funding structure. Including in-kind estimates, the total budget in the coming year is \$652,000. The plan for securing the needed revenue is:

- Site fees of \$233,000 (\$10,000 per intern)
- External grants totaling \$95,000
- Annual fundraising event hosted by staff and fellows to net \$30,000
- Consulting fees totaling \$15,000
- Core budget contribution of \$75,000
- Support from the Annual Fund and Bishop's Discretionary Fund grants totaling \$182,000
- In-kind housing services worth \$70,000

Some of these revenue sources are more secure at this point than others, and this is noted by posting some of the Life Together revenue as base supplemental revenue.

#### Housing:

In the 2013-2014 program year, one intentional community will continue to be housed in a diocesan property (40 Prescott Street in Brookline). Since this is a year-to-year arrangement and since the total number of interns can change, for the purpose of understanding the cost model of the Life Together program, this budget includes the in-kind value of housing provided this year by diocesan property.

Additionally, Life Together is continuing a partnership with All Saints Parish in Brookline—where the other seven first-year Micah fellows will live this fall—and is a partner of the redevelopment project at the former St. Luke's and St. Margaret's Church in Allston—alongside Episcopal City Mission, the Boston University Chaplaincy, and Episcopalians for Global Reconciliation, the Leadership Development Initiative and Still Harbor. As a part of this project, the Life Together Emmaus Fellows will live in the former rectory of St. Luke's and St. Margaret's.

Esperanza Teaching Fellows will live in a house owned by Esperanza Academy. South Coast Mission Hub Fellows will live in the rectory owned by the Church of the Holy Spirit in Fall River.

#### MIT Campus Ministry: 3111 - Core

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$114,768) plus program expenses of \$8,000. The ministry may raise additional funds through the MIT development office.

#### Boston University Campus Ministry: 3121 - Core

The Boston University campus ministry cost center budget provides for salary, expenses and benefits for a half-time chaplain (\$45,660) plus program expenses of \$8,000.

#### Boston College-Northeastern University Campus Ministries:

3131, 3136, 3141 - Core & Supplemental

One chaplain splits her time between the Boston College and Northeastern campuses, and the shared cost center, 3136, provides for the salary, expenses and benefits (\$106,254). Each of these campus ministry programs is allotted \$8,000 for program support. The chaplain, with the diocesan bishop, has traditionally led a pilgrimage at Christmastime with college students, funded through the supplemental budget. There is no pilgrimage planned in 2014.

Tufts University Ministry: 3171 - Core

\$8,000 is matched by an equal contribution from Grace Church, Medford and from Tufts University, which also provides health insurance to the chaplain.

Grace Chapel, Brockton: 3221 – Supplemental

Funding for the ministry in Brockton continues to come from assets held by the former congregation. A new worshipping congregation, Grace Chapel, a ministry of St. John's Church, Holbrook, which currently meets in the First Lutheran Church in Brockton, is also drawing on those funds. Continued funding will come from the proceeds of the sales of the property there. Bishop Cederholm has convened a committee to discern what shape the ministry in Brockton will take.

Continuing Grants for Congregations: 3231, 3241, 3251 - Core

Level funding is provided in the 2014 budget for grants directly to congregations to help pay their clergy, as follows: San Lucas/St. Luke's, Chelsea, \$66,000; and San Juan/Christ Church, Hyde Park, \$44,000; and for the compensation and benefits paid directly to the vicar at St. Stephen's Church, Boston (\$122,331).

Cantonese Congregations: 3311, 3321 - Core & Supplemental

The core budget provides the full compensation and benefits support for the canon for Asiamerican ministries in cost center 3311 (\$86,300). The two Cantonese congregations raise additional funds for their ministries through contributions and grants (projected at \$88,000). These revenues and the activities funded through them are reflected in the supplemental budget lines for these two cost centers.

St. Mary's, Dorchester: 3331 - Core

\$50,000 to support part of a full time clergy salary for 2014.

Hispanic Ministry in Salem: 3341 - Core

New clergy leadership is now in place at San Pedro/St. Peter's. The \$75,000 grant in the 2014 core budget (a \$5,000 decrease from 2013) will help the congregation, both Hispanic and Anglo, to follow its strategic plan that would have it increasingly viable over the next five years.

Grace Church, Lawrence: 3351 - Core

The \$70,000 grant in the 2014 core budget (a \$2,000 decrease from 2013) supports part of the salary of a Hispanic priest who ministers to all members of the congregation. Grace is in the process of developing a strategic plan.

Church of the Good Shepherd, Watertown: 3361 - Supplemental

At Bishop Shaw's behest, the parishioners at Good Shepherd have developed a long-range plan to develop a center for family ministry. A grant of \$70,000 to support part of a clergy salary and a Life Together intern is included in the 2014 budget, funded in the supplemental budget through the proceeds from the sale of St. Andrew's Church in Belmont.

Urban Residents: 3411 - Core & Supplemental

The Urban Residents program places newly ordained clergy in urban parishes for three-year terms, with experienced mentors who help to train the next generation of skilled urban clergy. There are three urban residents in 2014: one full time for half of 2014 and two half time for the full year—the equivalent of one and a half full-time grants. The core budget will fund ap-

proximately 80% of the total cost. The remaining costs will be funded through other anticipated contributions from donors.

**African Ministries: 3431 - Core**

The budget for grants to African congregations is level funded at \$25,000 in 2014. The director of congregational resources and training and the diocesan liaison to African Ministries are fine-tuning the application process with the African clergy and congregations.

**Jubilee Ministry: 3511 - Core & Supplemental**

The core budget shows a renewed commitment of 0.7% of the core budget to the Jubilee Ministry, set at \$45,000. We anticipate approximately \$32,000 in additional project costs which will be funded out of the supplemental budget through fundraising efforts from prior years that have carried forward.

**Committee on Palestine and Israel: 3531**

This committee's work has been funded through the Together Now campaign mission tithe.

**B-SAFE: 3541 - Supplemental**

The B-SAFE program is an important outreach and partnership opportunity for more than 50 participating congregations, including five host churches and the Epiphany School. As a separate 501(c)(3), B-SAFE has its own set of financial controls and development efforts. For 2014 the program is budgeted a diocesan contribution of \$225,000 from the supplemental budget, of which \$125,000 will be funded through the Annual Fund and \$100,000 funded through the grants from the bishop's discretionary funds.

**B-PEACE for Jorge: 3545 – Supplemental**

Established by Diocesan Convention 2012 in response to the murder of Jorge Fuentes and other acts of violence across the nation, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge Campaign is funded at \$60,000 from the Annual Fund and other contributions. One part-time staff person and volunteers from across the diocese, as well as interfaith and civic partners, are committed to the campaign's projects to help end violence.

**Mission Through Partnerships: 3551 – Core**

\$8,000 to support the travel costs of volunteer missionaries.

**The Cathedral: The Crossing; and Cathedral Ministry with the Homeless: 3911 - Supplemental**  
A \$65,000 grant is budgeted from the supplemental budget to support the work of the Thursday night emergent church congregation at the Cathedral Church of St. Paul and to support work with the homeless by the cathedral's associate minister. It is the responsibility of the Cathedral Chapter to decide how the grant is distributed.

**Barbara C. Harris Center: 3921 – Core**

\$1,643 grant will be given out of a restricted fund.

**Episcopal City Mission: 3931 - Core**

The budget continues the longstanding commitment to Episcopal City Mission's Burgess Urban Fund with a level-funded \$30,000 grant.

**United Thank Offering: 3952 - Core**

This funding is restricted for the support of the Native American Lillian Vallely School in Idaho.

**Strategic Ministries  
2014 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2012 Actuals</b>							
CC3011 Youth Ministry	56,483	77,892	8,485	290	(29,127)	-	114,023
CC3012 Youth Leadership Academy	17,898	-	22,163	-	(36,639)	-	3,422
CC3056 Life Together	-	-	-	-	-	75,000	75,000
CC3111 MIT	177	113,587	6,144	-	-	-	119,908
CC3121 Boston University	-	46,652	2,427	-	-	-	49,079
CC3131 Boston College	3,055	-	2,276	-	-	-	5,331
CC3136 BC/NU Combined	304	105,130	111	-	-	-	105,545
CC3141 Northeastern	3,055	3,527	2,276	-	-	-	8,858
CC3231 Chelsea, St Lukes/San Lucas	66,000	-	-	-	-	-	66,000
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	-	-	44,000
CC3251 South End, St Stephen's	-	122,425	-	-	-	-	122,425
CC3311 Boston Cantonese Congregation	2,220	110,693	-	-	-	-	112,913
CC3331 Dorchester Partnerships	20,000	-	-	-	-	-	20,000
CC3341 Salem, San Pedro	80,000	-	-	-	-	-	80,000
CC3351 Lawrence, Grace Church	72,000	-	-	-	-	-	72,000
CC3411 Urban Residents	-	-	-	-	-	35,000	35,000
CC3431 African Ministries	25,000	-	2,055	125	-	-	27,180
CC3511 Jubilee Ministry	-	-	-	-	-	45,000	45,000
CC3551 Mission Through Partnerships	-	-	320	-	(600)	-	(280)
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000
CC3952 UTO/American Indians/CHS	2,000	-	-	-	-	-	2,000
<b>Totals</b>	<b>422,192</b>	<b>579,906</b>	<b>46,257</b>	<b>415</b>	<b>(66,366)</b>	<b>155,000</b>	<b>1,137,404</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2014 Budget</b>							
CC3011 Youth Ministry	72,000	88,051	11,000	-	(36,000)	-	135,051
CC3012 Youth Leadership Academy	20,000	-	25,000	-	(40,000)	-	5,000
CC3056 Life Together	-	-	-	-	-	75,000	75,000
CC3111 MIT	-	114,768	8,000	-	-	-	122,768
CC3121 Boston University	-	45,660	8,000	-	-	-	53,660
CC3131 Boston College	-	-	8,000	-	-	-	8,000
CC3136 BC/NU Combined	-	106,254	-	-	-	-	106,254
CC3141 Northeastern	-	-	8,000	-	-	-	8,000
CC3171 Tufts University Ministry	8,000	-	-	-	-	-	8,000
CC3231 Chelsea, St Lukes/San Lucas	66,000	-	-	-	-	-	66,000
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	-	-	44,000
CC3251 South End, St Stephen's	-	122,331	-	-	-	-	122,331
CC3311 Boston Cantonese Congregation	-	86,300	-	-	-	-	86,300
CC3331 St. Mary's Dorchester	50,000	-	-	-	-	-	50,000
CC3341 Salem, San Pedro	75,000	-	-	-	-	-	75,000
CC3351 Lawrence, Grace Church	70,000	-	-	-	-	-	70,000
CC3411 Urban Residents	92,500	-	-	-	-	-	92,500
CC3431 African Ministries	25,000	-	-	-	-	-	25,000
CC3511 Jubilee Ministry	45,000	-	-	-	-	-	45,000
CC3551 Mission Through Partnerships	-	-	8,000	-	-	-	8,000
CC3921 Barbara C Harris Center	1,643	-	-	-	-	-	1,643
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000
CC3952 UTO/American Indians/CHS	1,487	-	-	-	-	-	1,487
<b>Totals</b>	<b>600,630</b>	<b>563,364</b>	<b>76,000</b>	<b>-</b>	<b>(76,000)</b>	<b>75,000</b>	<b>1,238,994</b>
							<b>1,118,383</b>

**Strategic Ministries  
2014 Supplemental Budget**

<u>2012 Actuals</u>	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total Cost</u>	<u>Annual Fund</u>	<u>Other Development Contributions</u>	<u>BDF Grants</u>	<u>Use of Proceeds</u>	<u>Net Cost</u>
	9,881	394,176	113,654	(160,076)	(75,000)	282,635	(113,780)	(28,422)	(140,433)	-	-
CC3056 Life Together	8,000	-	-	(8,000)	-	-	-	-	-	-	-
CC3171 Tufts University Ministry	87,585	-	15,236	(60,008)	-	27,577	-	(27,577)	-	(64,376)	-
CC3311 Boston Cantonese Congregation	49,140	-	-	-	-	60,000	-	-	-	(60,000)	-
CC3331 Dorchester Partnership	60,000	-	-	-	-	60,000	-	-	-	(70,000)	-
CC3361 Watertown, Good Shepherd	208,125	-	-	-	(35,000)	173,125	(83,024)	(20,101)	-	-	-
CC3411 Urban Residents	76,559	-	348	(16,264)	(45,000)	15,643	-	(15,643)	-	-	-
CC3511 Jubilee Ministry	225,000	-	-	-	-	225,000	-	-	(225,000)	-	-
CC3541 B-SAFE	50,000	-	-	-	-	50,000	-	-	(50,000)	-	-
CC3911 Cathedral Church of St Paul	10,000	-	-	-	-	10,000	-	-	(10,000)	-	-
CC3921 Barbara Harris Camp and Conference Center	-	-	-	-	-	-	-	-	-	-	-
<b>Totals</b>	<b>784,290</b>	<b>394,176</b>	<b>129,238</b>	<b>(244,348)</b>	<b>(155,000)</b>	<b>908,356</b>	<b>(196,804)</b>	<b>(91,743)</b>	<b>(425,433)</b>	<b>(194,376)</b>	<b>-</b>

<u>2014 Budget</u>	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total Cost</u>	<u>Annual Fund</u>	<u>Other Development Contributions</u>	<u>BDF Grants</u>	<u>Use of Proceeds</u>	<u>Net Cost</u>
	-	400,286	251,740	(375,000)	(75,000)	202,026	(125,000)	(20,000)	(57,026)	(93,350)	-
CC3011 Youth Ministry	83,550	-	-	-	-	83,550	-	-	-	-	15,000
CC3056 Life Together	88,000	-	-	(88,000)	-	-	-	-	-	-	591,500
CC3221 Grace Chapel, Brockton	20,000	-	-	-	-	20,000	-	-	-	-	50,000
CC3311 Boston Cantonese Congregation	70,000	-	-	-	-	70,000	-	(20,000)	-	-	48,000
CC3321 Cantonese Life Program	20,000	-	-	-	-	20,000	-	-	-	-	-
CC3331 St. Mary's Dorchester	20,000	-	-	-	-	20,000	-	-	-	(70,000)	-
CC3361 Watertown, Good Shepherd	62,000	15,846	-	-	(45,000)	32,846	-	(2,846)	-	-	70,000
CC3411 Urban Residents	225,000	-	-	-	-	225,000	(125,000)	(100,000)	-	-	50,000
CC3511 Jubilee Ministry	45,000	-	-	-	-	45,000	(40,000)	-	-	-	225,000
CC3541 B-SAFE	65,000	-	-	-	-	65,000	-	-	(65,000)	-	-
CC3911 Cathedral Church of St Paul	-	-	-	-	-	-	-	-	-	-	60,000
CC3921 Barbara Harris Camp and Conference Center	-	-	-	-	-	-	-	-	-	-	-
<b>Totals</b>	<b>688,550</b>	<b>431,132</b>	<b>251,740</b>	<b>(463,000)</b>	<b>(120,000)</b>	<b>788,422</b>	<b>(290,000)</b>	<b>(92,846)</b>	<b>(242,026)</b>	<b>(163,550)</b>	<b>1,184,500</b>

Episcopal and Diocesan Support (see tables on pages 36 and 37)

The total 2014 budget for this area is \$2,299,402, with \$2,104,461 in the core budget and \$194,941 in the supplemental budget. The 2013 core budget total was \$2,155,211.

Area Staff and Expenses: 4000 - Core

This line includes two of the positions listed on the roster on page 50. Note that the part-time archivist position is currently vacant and ably administered by a volunteer. A new half-time position, project director of global mission, is being funded from the Together Now campaign mission tithe to oversee and support congregations and their partners outside the diocese as they develop and maintain collaborative mission work, either on their own or with Mission Tithe Grant money.

Diocesan Leadership Team: 4011, 4012, 4014 - Core

These three cost center codes carry the compensation for the diocesan bishop, the bishop suffragan and the canon to the ordinary, and their expense budgets.

Assisting Bishops: 4021 - Core

This cost center code carries assisting bishop Bud Cederholm's compensation and supporting expenses.

New Bishop Transition Reserve: 4023 – Core

As the transition process for a new diocesan bishop evolves in 2013 and into 2014, we have determined that it is important to create a long-term fund to help pay for the costs associated with the discernment, election and transition components of this process. Council's goal is to contribute \$50,000 per year out of the core budget to build this reserve.

Chancellor: 4031 - Core

This line is budgeted at \$4,000, with every effort made to assign legal costs to the specific cost center(s).

Title IV: 4061 - Core

Canonical clergy disciplinary process, budgeted at \$12,000 for 2014.

Diocesan Leadership Team Budgeted Resources: 4099 - Core

The entire budgeted amount of \$115,910 for 2014 represents funding for potential contingencies. Unlike the prior two years, this line item does not include any appropriations for staff compensation increases.

Diocesan Council: 4111; Standing Committee: 4121; Diocesan Youth Council: 4131 - Core

The 2014 amounts budgeted for these leadership bodies are \$10,000 for Diocesan Council; \$2,000 for Standing Committee; and \$3,000 for the Diocesan Youth Council.

Diocesan Convention: 4141 - Core

The \$50,000 net costs budgeted for 2014 assumes a two-day convention.

Journals and Diocesan Directory: 4151 - Core

This line is level-funded at \$11,000.

Archives: 4211 - Core

This line is funded primarily by spending policy draws from four restricted funds, which total \$13,600.

Massachusetts Council of Churches: 4251 - Core

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

Development Office: 4311- Core and Supplemental

Since 2009, the staff of the Office of Development has been funded in the supplemental budget, through a grant from the Bishop's Discretionary Fund. A portion of the cost of the development staff's compensation and benefits are allocated to the Together Now campaign based on actual experience. Staff compensation and benefits total approximately \$276,000. Out of this total, we have allocated approximately \$73,000 of cost to the Together Now Campaign. Beginning with the 2014 budget, we have transferred \$60,000 of the remaining \$203,000 cost to the core budget. The work of the Office of Development, through the Annual Fund appeals, directed development efforts on behalf of specific ministries, external grant applications, planned giving and the Together Now campaign are essential to the long-term viability of the diocesan mission strategy.

Annual Fund: 4312 - Supplemental

Projected expenses for 2014 are \$26,000 based on 2012 actuals.

Capital Campaign: 4321

Capital campaign revenue and expenses are not shown in the core or supplemental budgets as it is considered part of 'Other Operations'. See pages 42-44 for a discussion and analysis of the results of the campaign.

General Convention: 4411 - Core

To prepare for the expenses of sending a delegation to the Episcopal Church's triennial General Convention in 2015, \$16,000 will be accrued each year.

Province I Assessment: 4421 - Core

The total of \$19,179 includes our diocese's contribution of \$16,179, and an additional \$3,000 to support the province's energy stewardship minister.

Episcopal Church Asking: 4431 - Core

Our diocese's contribution to the work of the wider church is \$910,139, slightly lower than the 2013 asking.

**Episcopal and Diocesan Support  
2014 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2012 Actual</b>							
CC4000 Episcopal and Diocesan Support	-	80,087	-	-	-	-	80,087
CC4011 Diocesan Bishop	7,964	210,160	97,447	32	-	(25,000)	290,603
CC4012 Suffragan Bishop 1	-	163,789	4,987	-	-	-	168,776
CC4014 Canon to the Ordinary	-	160,169	8,079	-	-	-	168,248
CC4021 Assisting Bishops	-	36,800	7,880	-	-	-	44,680
CC4031 Chancellor	-	-	-	3,642	-	-	3,642
CC4061 Title IV	3,027	-	3,825	4,664	-	-	11,516
CC4099 Budgeted Reserve	16,620	-	4,000	-	-	-	20,620
CC4111 Diocesan Council	-	-	9,987	106	-	-	10,093
CC4121 Standing Committee	-	-	2,180	-	-	-	2,180
CC4131 Diocesan Youth Council	3,015	-	-	-	-	-	3,015
CC4141 Convention	1,163	1,030	47,262	170	(10,869)	-	38,756
CC4151 Journals and Diocesan Directory	-	1,556	10,330	-	-	-	11,886
CC4211 Archives	182	10,484	3,576	153	(640)	-	13,755
CC4251 Mass Council of Churches	50,000	-	-	-	-	-	50,000
CC4261 Ecumenical Committee	-	-	2,057	-	-	-	2,057
CC4411 General Convention	-	-	48,483	-	-	-	48,483
CC4421 Province I Assessment and Program	11,678	-	-	-	-	-	11,678
CC4431 The Episcopal Church Assessment	949,056	-	-	-	-	-	949,056
<b>Totals</b>	<b>1,042,705</b>	<b>664,075</b>	<b>250,093</b>	<b>8,767</b>	<b>(11,509)</b>	<b>(25,000)</b>	<b>1,929,131</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2014 Budget</b>							
CC4000 EPISCOPAL AND DIOCESAN SUPPORT		139,652					139,652
CC4011 Diocesan Bishop	8,000	215,874	50,000				273,874
CC4012 Suffragan Bishop 1		169,390	6,000				175,390
CC4014 Canon to the Ordinary		154,217	6,000				160,217
CC4021 Assisting Bishops		20,000	6,000				26,000
CC4023 New Bishop Transition Reserve	50,000						50,000
CC4031 Chancellor				4,000			4,000
CC4061 Title IV	3,000		4,000	5,000			12,000
CC4099 Budgeted Reserve				115,910			115,910
CC4111 Diocesan Council			10,000				10,000
CC4121 Standing Committee			2,000				2,000
CC4131 Diocesan Youth Council	3,000						3,000
CC4141 Convention	1,200	1,000	58,600	200	(11,000)		50,000
CC4151 Journals and Diocesan Directory			11,000				11,000
CC4211 Archives		10,500	3,500	200	(600)		13,600
CC4251 Mass Council of Churches	50,000						50,000
CC4261 Ecumenical Committee			2,500			60,000	62,500
CC4311 Development			16,000				16,000
CC4411 General Convention							
CC4421 Province I Assessment and Program	19,179						19,179
CC4431 The Episcopal Church Assessment	910,139						910,139
<b>Totals</b>	<b>1,044,518</b>	<b>710,633</b>	<b>175,600</b>	<b>125,310</b>	<b>(11,600)</b>	<b>60,000</b>	<b>2,104,461</b>
							<b>2,155,211</b>

**Episcopal and Diocesan Support  
2014 Supplemental Budget**

<b>2012 Actual</b>	<b>Program Expenses</b>	<b>Compensation &amp; Benefits</b>	<b>Operational &amp; Support Svcs</b>	<b>Mgt and Prof Svcs</b>	<b>Revenue Offset</b>	<b>Transfers</b>	<b>Total</b>	<b>Annual Fund</b>	<b>BDF Grants</b>	<b>Net Cost</b>	
CC4011 Diocesan Bishop	4,418	-	5,112	-	-	25,000	34,530	-	(34,530)	-	
CC4012 Suffragan Bishop 1	28,192	-	101,865	-	(112,699)	-	17,358	-	(17,358)	-	
CC4311 Development	-	134,995	23,312	1,042	-	-	159,349	-	(159,349)	-	
CC4312 Annual Fund	-	507	25,428	-	-	-	25,935	(25,935)	-	-	
<b>Totals</b>	<b>32,610</b>	<b>135,502</b>	<b>155,717</b>	<b>1,042</b>	<b>(112,699)</b>	<b>25,000</b>	<b>237,172</b>	<b>(25,935)</b>	<b>(211,237)</b>	<b>-</b>	
<b>2014 Budget</b>	<b>Program Expenses</b>	<b>Compensation &amp; Benefits</b>	<b>Operational &amp; Support Svcs</b>	<b>Mgt and Prof Svcs</b>	<b>Revenue Offset</b>	<b>Transfers</b>	<b>Total</b>	<b>Less Other Funding Sources Annual Fund</b>	<b>BDF Grants</b>	<b>Net Cost</b>	<b>2013 Budget</b>
CC4011 Diocesan Bishop	4,000	-	5,000	-	-	-	9,000	-	(9,000)	-	5,000
CC4012 Suffragan Bishop 1	28,000	-	102,000	-	(113,000)	-	17,000	-	(17,000)	-	-
CC4099 Budgeted Reserve	-	-	-	-	-	-	-	-	-	-	18,000
CC4311 Development	-	177,941	24,000	1,000	-	(60,000)	142,941	-	(142,941)	-	291,000
CC4312 Annual Fund	-	-	26,000	-	-	-	26,000	(26,000)	-	-	1,000
<b>Totals</b>	<b>32,000</b>	<b>177,941</b>	<b>157,000</b>	<b>1,000</b>	<b>(113,000)</b>	<b>(60,000)</b>	<b>194,941</b>	<b>(26,000)</b>	<b>(168,941)</b>	<b>-</b>	<b>315,000</b>

Administrative Services (see table on page 39)

The total 2014 budget for this area is \$1,247,501, all from the core budget. The 2013 core budget total was \$1,182,707.

Administrative Services: 5000 - Core

This area has six staff positions within it (see roster on page 50).

Treasurer's Office: 5011 - Core

This area includes support expenses of \$25,755 and outside service fees, including the auditors, totaling \$55,913. The cost center overall shows a net inflow, as the Treasurer's Office receives \$97,000 in fee income for financial and administrative services provided. The largest sources of fee income are the Cathedral Church of St. Paul (\$63,000) and the Trustees of Donations (\$34,000). In addition, the administrative services area receives \$25,000 per year from the Stokes Loan program to cover administrative costs associated with the loan program (see cost center 5511).

Human Resources: 5021 - Core

Since August of 2012, we have utilized the expertise of outside HR consultants to help us understand our future needs and to work with us to shore up various internal personnel policies. In 2014, our plan is to hire an HR director and use consultants to supplement this vital function as needed. We have appropriated \$2,200 to HR for support and \$20,000 for the consultants.

Information Technology: 5031 - Core

The costs in this area cover important aspects of our operations including networking, software and hardware, internet, telephone and conferencing, and office equipment. These costs are partially offset by fees received from the Cathedral Church of St. Paul (\$40,200).

Risk Management: 5041 - Core

This amount is raised to \$66,000, based on projections related to the cost of insurance.

Investments: 5051 - Core

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) associated with a particular bequest, including making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2014 is \$5,600.

Boston, 138 Tremont Street: 5111 - Core

Included in this budget cost center is \$441,600 for payment in lieu of rent to the Cathedral Church of St. Paul and approximately \$69,000 for office repairs and maintenance.

Brookline, 40 Prescott Street: 5121 - Core

Cost of maintaining this property is budgeted at \$20,000.

Allston property: 5125 - Core

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 from the core budget. In 2012, Bishop Shaw convened a committee to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The plan calls for repurposing and renovation of the property to accommodate a mixed-use operating concept by many different programs and/or other associated non-profit organizations. The long-term objective of the plan calls for a model of financial self-sufficiency. Based on where the current plan is, the Diocesan Council believes it is prudent to start weaning the property off of the core budget. As such, we have reduced the core budget allocation for this property to \$20,000 in 2014, down from \$50,000 in 2013.

Services to Stokes Loan: 5511 - Core

The \$25,000 in this line covers the cost to administer the diocese's revolving loan fund.



### Proceeds from Closed Congregations: Additional Information

The following congregations have closed in recent years:

- St. George's Church, Maynard - 2006
- Church of the Holy Trinity, Marlborough - 2008
- St. Luke's Church, Malden - 2008
- St. Andrew's Church, Belmont - 2008
- Church of St. Matthew and The Redeemer, South Boston - 2008
- St. Alban's Church, Lynn - 2009
- St. Augustine's Church, Lawrence - 2009
- St. David's Church, Halifax - 2009
- St. Paul's Church, Brockton - 2010
- St. Luke's and St. Margaret's Church, Allston - 2010
- St. Paul's Church, Millis - 2010
- St. Andrew's Church of the Deaf, Natick - 2011
- Trinity Church, Weymouth - 2013
- Christ Church, Somerville - 2013 pending

In the transition surrounding a church closing, diocesan staff provide support and services of all kinds. At the end of the closing process, the remaining assets are transferred to the diocese, for the Diocesan Council to allocate. In February 2011, the council created a new Fund for Congregational Vitality from 50% of the net proceeds for the above congregations (except Brockton). The remaining 50% has been available for distribution by the council. In early 2013, Diocesan Council approved the appropriation of up to \$1.2 million from the remaining 50% of the uncommitted net proceeds to go toward a renovation project at St. Luke's/San Lucas in Chelsea for its feeding and clothing programs.

The table on page 41 shows status of the proceeds for 11 of the closed congregations:

**Proceeds**—Gross revenue from sales, or in the case of Natick, a transfer of endowment

**Direct Costs**—Brokerage fees, if any; legal and zoning; preparing the property for market; past-due assessments and loans; staff and archive costs

**Net Proceeds**—Direct costs subtracted from proceeds

**Net Margin on Proceeds**—The percentage of the proceeds available after costs

**50% of Net Proceeds**—50% of the net proceeds is sent to the Fund for Congregational Vitality; the other 50% is available for the stewardship process

**Designated or expended to date**—In advance of the stewardship process, Diocesan Council allocated some of the proceeds as follows:

- Malden: \$225,000 to help fund a clergy salary at St. John's Church, Saugus, where a majority of the Malden congregation now worships
- Belmont: \$289,894 to help fund a clergy salary, interns and program at the Church of the Good Shepherd, Watertown, an experiment in building family ministry, and to fund half an urban resident grant at St. James's Church, Cambridge
- South Boston: \$527,832 to St. Mary's Church, Dorchester, at the request of the closing church and the deanery, for building repair, and to pay for half of the cost of an urban resident

**Available**—The remaining balance of the 50% currently available for distribution by Council.

The net proceeds from St. Paul's Church, Brockton are currently outside the stewardship process. The sale of Christ Church, Somerville is pending.

**Episcopal Diocese of Massachusetts**  
**Use of Proceeds from Closed Parishes Summary**  
**As of August 31, 2013**

Parish	Gross Proceeds	Less Direct costs	Net Proceeds	50% of Net Proceeds	Expended to date	Designated or expended to date		Available
						Committed or Expended in 2013	Committed as part of 2014 Budget	
Maynard	392,507	(156,858)	235,649	117,825				117,825
Marlborough	317,427	(56,205)	261,222	130,611				130,611
Malden	611,007	(88,698)	522,309	261,154	(125,000)	(50,000)	(50,000)	36,154
Belmont	1,106,318	(39,797)	1,066,521	533,261	(149,894)	(70,000)	(70,000)	243,367
South Boston	1,106,939	(51,276)	1,055,664	527,832	(463,456)	(64,376)	(0)	233,263
Lynn	619,978	(153,451)	466,527	233,263				64,386
Lawrence	202,609	(73,837)	128,772	64,386				84,356
Halifax	249,880	(81,169)	168,711	84,356				121,612
Natick	255,287	(12,063)	243,224	121,612				179,195
Millis	448,030	(89,640)	358,390	179,195				245,718
Weymouth	667,724	(176,289)	491,435	245,718				
	5,977,706	(979,282)	4,998,424	2,499,212	(738,350)	(184,376)	(120,000)	1,456,486
					Add investment earnings realized from TOD agency fund			<u>112,182</u>
								1,568,668
								<u>(1,200,000)</u>
								<u><u>368,668</u></u>

Less: committed to Chelsea renovation project by vote of Diocesan Council

Available as of 8/31/13

### Together Now Campaign: Additional Information

The diocese publicly launched, at Diocesan Convention in 2011, Together Now, a \$20-million fundraising campaign as a vital and living expression of the mission strategy of the diocese. Its array of initiatives intend to build up congregational life and mission through collaboration and by expanding the reach of already successful diocesan programs in five broad areas: \$2 million as a tithe for global mission work; \$2 million for environmental stewardship through “green” grants and loans; \$4.5 million to create regional mission hubs and a Mission Institute (the latter a collaboration with Episcopal City Mission and Episcopal Divinity School); \$7.5 million for ongoing and expanded ministry programs with children, youth and young adults, including the Barbara C. Harris Camp and Conference Center; and \$4 million for renovations to the Cathedral Church of St. Paul to make it more accessible, more energy efficient and better configured to both host and model innovative worship, ministry and public witness.

At the 2012 Diocesan Convention, it was announced that 139 congregations had elected to participate in the campaign, through one of four methods: collaborative campaign, in-pew collection, parish pledge or tithes and other gifts from independently run parish campaigns. It was also announced that nearly \$19 million in verbal and written pledges had been received toward the diocesan campaign goal. Another \$11.3 million had been raised by local congregations conducting collaborative campaigns in coordination with the diocesan campaign.

Today, the fundraising effort is complete, with 100% of the congregations of the diocese electing to participate. Nearly 4,000 individual gifts and pledges have been offered, yielding just over \$20 million and surpassing the campaign goal. An additional \$11.8 million has been raised by local collaborative campaigns—money that will stay in congregations to be used on their locally defined priorities—bringing the total raised across the diocese to just under \$32 million in written and verbal pledges.

First conversations about the campaign began in early 2010. From that point, consultants were contracted, the case was tested and revamped, the “quiet” leadership gifts phase began, congregations were recruited and collaborative campaigns were conducted. Now, nearly four years later, with the fundraising effort concluded, the diocesan community basks in the success of creating and funding pioneering initiatives through the campaign, as well as experiencing a new spirit of philanthropy and partnership.

**Highlights as of Sept. 9, 2013**

	<u># of Pledges</u>	<u>Pledge Totals</u>
Leadership giving	259	\$ 11,664,816
Collaborative Campaigns		
39 parish collaborative campaigns	1,984	\$ 16,604,879
Less: parishes share of pledge (70%)		\$ (11,623,415)
Less: parish adjustments		<u>\$ (248,302)</u>
Diocesan share of collaborative campaign		4,733,162
48 campaigns through in-pew collections	1,613	1,759,430
Tithes and other gifts offered from parish-run campaigns	13	1,055,400
Other parish pledges	<u>67</u>	<u>837,018</u>
 Total Diocesan share of pledges		 20,049,826
 Plus: parish share of collaborative campaign		 <u>11,871,717</u>
 Total pledges - Diocesan and parish share	 3,936	 <u><u>\$ 31,921,543</u></u>

The June 30, 2013, cash flow chart on page 44 reflects the collections of pledges and contributions from individuals and congregations, designated gifts as well as unrestricted gifts. An amount of \$3,069,834 has been returned to parishes that participated in the collaborative campaign option. Expenses are in two categories: Direct Campaign Expenses which reflect money spent on the implementation of the campaign initiatives and Other Expenses which are associated with fundraising: consultations, fees and expenses. Under Direct Campaign Expenses, the funds to the Barbara C. Harris Camp and Conference Center are included in the Youth and Young Adult column, and funding for the Mission Institute is included in the Mission Hubs category. Under Other Expense, the total amount is slightly above 10% of the total raised for the diocesan portion, but when compared to the total raised across the diocese of approximately \$32 million, the percentage is a very favorable 7.3%.

**Together Now Campaign**  
**Cash Basis Revenues and Expenses**  
**Inception to Date through June 30, 2013**

	ACTUALS							
	<u>General</u>	<u>Mission Tithe</u>	<u>Environmental Initiatives</u>	<u>Mission Hubs</u>	<u>Youth &amp; Young Adults</u>	<u>Cathedral Renovations</u>	<u>Cederholm House</u>	<u>Total</u>
<b>Revenues</b>								
Leadership Gifts	5,185,342	0	0	255,110	219,501	299,970	43,091	6,003,014
Collaborative Gifts from parishes (100% gross)	4,501,717	0	0	-50	0	0	0	4,501,667
In pew collections	457,778	0	0	0	0	0	0	457,778
<b>Gross Revenue</b>	<b>10,144,837</b>	<b>0</b>	<b>0</b>	<b>255,060</b>	<b>219,501</b>	<b>299,970</b>	<b>43,091</b>	<b>10,962,459</b>
Less payments to collaborating parishes to date (70%)	-3,069,834	0	0	0	0	0	0	-3,069,834
<b>Net Revenues</b>	<b>7,075,003</b>	<b>0</b>	<b>0</b>	<b>255,060</b>	<b>219,501</b>	<b>299,970</b>	<b>43,091</b>	<b>7,892,625</b>
<b>Direct Campaign Expenses</b>								
Grants and direct payouts	0	477,475	253,047	217,574	450,000	450,000	0	1,848,096
Other direct expenses	0	48,045	20,880	344,817	111,360	13,920	0	539,022
<b>Total Direct Campaign Expenses</b>	<b>0</b>	<b>525,520</b>	<b>273,927</b>	<b>562,391</b>	<b>561,360</b>	<b>463,920</b>	<b>0</b>	<b>2,387,118</b>
<b>Other Expenses</b>								
Compensation and benefits	0	0	0	111,495	111,494	0	0	222,989
Operating and staff support	0	4,178	0	139,919	139,954	0	0	284,051
Direct Program Expenses	0	0	0	652	652	0	0	1,304
Technology costs	0	0	0	1,740	1,739	0	0	3,479
Facilities and other services	0	0	0	7,540	7,540	0	0	15,080
Management and professional services	0	0	100,000	229,205	1,329,204	150,000	0	1,808,409
<b>Total Other Expenses</b>	<b>0</b>	<b>4,178</b>	<b>100,000</b>	<b>490,551</b>	<b>1,590,583</b>	<b>150,000</b>	<b>0</b>	<b>2,335,312</b>
<b>Total Expenses</b>	<b>0</b>	<b>529,698</b>	<b>373,927</b>	<b>1,052,942</b>	<b>2,151,943</b>	<b>613,920</b>	<b>0</b>	<b>4,722,430</b>
<b>Net Cash Inflow from inception</b>	<b>7,075,003</b>	<b>-529,698</b>	<b>-373,927</b>	<b>-797,882</b>	<b>-1,932,442</b>	<b>-313,950</b>	<b>43,091</b>	<b>3,170,195</b>

**Appendix 1: 2014 Endowment Spending Policy Revenue  
and related market values as of June 30, 2013**

		Market value of Fund - 6/30/13	Draw amount
D7002C	JOHN B COBURN ENDOWMENT FUND	1,258,823	47,086
D7002D	C.L.T. LEE / B. WONG FUND	116,093	4,448
D7002E	AFRICAN SCHOLARSHIP FUND	261,830	9,791
D7002G	ENDOWMENT FOR MAINTENANCE	202,266	7,444
D7002J	AIM / HOSPITAL MINISTRY	575,102	21,571
D7002L	HARRIET G AVERILL FUND	40,085	1,499
D7002M	D A F BISHOP NASH FUND	207,674	7,768
D7002N	CLERGY SALARY FUND	762,642	28,527
D7002O	CAMP DENNEN FUND	44,991	1,643
D7002P	FREDRICK C LAWRENCE/RHINELANDER FUND	254,522	9,520
D7002T	THE ELIZA GRAY CASE TRS P E C	3,109,793	116,962
D7002U	CAMPUS MINISTRIES FUND	239,919	8,974
D7002V	ST JOHNS EAST BOSTON FUND	653,443	24,442
D7002Y	HOUSE OF MERCY FUND	727,077	27,196
D7003A	THE JESSIE B COX FUND	790,314	29,562
D7003B	WILLIAM V. TRIPP JR. MEMORIAL FUND	1,012,241	37,863
D7003C	AIM CHRISTIAN WITNESS IN EDUC	955,799	35,752
D7003D	MAURINE C COBURN TRUST	170,876	6,392
D7003E	YOUTH ON MISSION	181,153	6,776
D7003F	AIM WILLIAM COOLIDGE ENDOWMENT FD	3,771,267	141,065
D7003K	POOLED INCOME ENDOWMENT FUND	7,335	274
D7003R	W. CHISOLM FUND	93,596	3,498
D7004E	SEMINARIAN EDUCATIONAL ENDOWMENT	1,271,523	47,665
D7004H	DEAF MINISTRY ENDOWMENT	566,420	2,000
D8000T	FREDERICK A REEVE FUND	221,216	8,331
D8000V	THOMAS M COFFIN FUND	131,575	4,917
D8000W	A. JACKSON FUND	73,987	2,855
D8000X	BISHOPS ENTERTAINMENT	158,419	5,966
D7004I	TOTAL FUND FOR CONG VITALITY	3,115,822	115,601
D7002X	GENERAL ENDOWMENT FUND	2,261,224	111,329
	<b>Total</b>	<b>23,237,027</b>	<b>876,717</b>

**Appendix 2: 2014 Trust Fund Income  
and related market values at June 30, 2013**

		<b>Market value of Fund - 6/30/13</b>	<b>Draw amount</b>
D2110B	G & S TURNER MEMORIAL FUND	13,935	513
D4065A	ST MATTHEWS ENDOWMENT FD	152,486	5,631
D4065B	SAMUEL & EMMA DOWNING FD	8,036	297
D4065C	JOSEPH C STOREY FUND	88,494	3,269
D4065D	MARY A WILSON FUND	46,603	1,722
D4065E	A SMITH FUND FOR RECTORY MAINTENANCE	67,500	2,493
D4065G	MARTHA TERRY FUND	283	10
D7000A	DIOCESAN ENDOWMENT FUND	4,670,692	174,226
D7000B	VOTE OF CORP DIOCESAN FUND - VOC	1,855,037	69,099
D7000D	FAY DONATION I	242,229	9,027
D7000G	BENJAMIN LEEDS FUND - VOC	5,021,819	164,901
D7000I	CHURCHES AND CHAPELS FUND - VOC	89,810	3,347
D7001E	APPLETON FUND	50,270	1,873
D7001F	BISHOP'S FUND	1,179,436	43,952
D7001G	BISHOP OF MA SALARY FUND	148,502	5,534
D7001H	BISHOPS HOUSE FUND	243,765	9,084
D7001I	SUFFRAGAN BISHOPS FUND	954,510	35,570
D7001J	CAMILLA DAVENPORT FUND	37,388	1,393
D7001K	CORNELIA A FRENCH FUND	835,817	31,147
D7001L	KATHERINE FRENCH FUND	173,716	6,474
D7001O	ETHEL A CLARK FUND	1,144,923	42,666
D7001Q	MARY K D BABCOCK FD I	265,960	9,911
D7001R	MARY K D BABCOCK FD II	33,193	1,237
D7001S	JULIA K DAVEY FUND	82,655	3,080
D7001T	WILLIAM C WINSLOW FUND - VOC	12,111	451
D7001W	WK OF MERCY HARVISON FUND	44,725	1,667
D7001X	AMY YEAMES FUND	53,661	2,000
D7001Y	EDITH MUNRO FUND	23,436	873
D7002Q	AC BULLARD FD STUDENTS	225,517	8,404
D7003X	PATTON MEMORIAL FUND	1,217,481	45,371
D7004B	PATTON FUND FOR MAINTENANCE	100,401	3,741
D7004C	KATHERINE M. FOSTER TRUST	211,893	7,895
D7004D	FRANK H. BURNETT FUND	43,866	1,634
D8000R	DILL FUND	76,315	2,400
D9000Z	ABBY BROWN TRUST - VOC	176,098	6,562
D9001B	EDMUND F SLAFTER FUND II	220,549	8,219
	<b>Total</b>	<b>19,813,113</b>	<b>715,673</b>

**Appendix 3: Grants to Congregations in 2012**

<b>Congregational Development Open Grants</b>			<b>\$200,000</b>
<b>Congregation</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
Church of Our Saviour	Arlington	Growing Two Generations	\$4,500
All Saints' Church	Attleboro	Serving and Inviting People Into the Life of All Saints'	\$3,800
St. Andrew's Church	Ayer	Invite and Welcome Families with Children	\$4,000
Ecclesia Ministries	Boston	Ecclesia	\$2,500
Boston Chinese Ministries	Boston	Youth Zone	\$6,500
Grace Chapel, Brockton	Brockton	Boys and Girls Organization	\$7,000
St. Peter's Church	Buzzards Bay	Shine Jesus Shine: Formation Program for Children	\$1,500
St. James's Church	Cambridge	Anti-Oppression Program	\$8,000
Cape and Islands Deanery	Cape and Islands	Empowering Parishes in the Digital Age	\$5,580
St. John's Church	Charlestown	Ramp Up for Kids Program	\$7,167
St. Christopher's Church	Chatham	Children's Spirituality Library	\$1,000
Concord River Deanery	Concord River	Adult Formation	\$3,550
Grace Church	Everett	Doubling the Congregation	\$7,300
Church of the Holy Spirit	Fall River	Music Ministry	\$2,000
St. Andrew's Church	Framingham	Brazilian Ministry	\$700
St. John's Church and Trinity Church	Franklin/ Wrentham	Collaborating Congregations	\$7,000
St. James's Church	Groveland	Telling God's Story in the 21st Century	\$3,000
St. Andrew's Church	Hanover	Collaboration on Rhythms of Grace	\$3,400
Trinity Church	Haverhill	Life Cycles and Social Media	\$7,703
St. John's Church	Holbrook	Revitalizing St John's Year II	\$4,450
Merrimack Valley Deanery	Lower Merrimack Valley Collaborative	Needs and Gifts Assessment	\$6,000
St. Stephen's Church	Lynn	Strengthening Families and Revitalizing the School	\$8,500
St. Paul's Church	Lynnfield	Building Our Music Program	\$4,000
St. Paul's Church	Newburyport	The Church That Is To Come	\$3,750
St. Paul's Church	Newton Highlands	Answering God's Urgent Call With a Song	\$6,250
St. Peter's Church	Osterville	Family Ministries Project	\$4,500
Christ Church	Plymouth	Sustainable Ministry at Christ Church Year II	\$5,000
St. Mary's Church	Provincetown	Communication Throughout the Year and Across the Globe	\$8,500
St. Chrysostom's Church	Quincy	Social Media Pilot Program Year II	\$10,000
Christ Church	Quincy	Teen Program	\$5,000
Trinity Church	Randolph	Let's Hit the Ground Running	\$5,000
Trinity Church	Rockland	Inviting Children and Youth	\$4,000
Church of Our Saviour	Somerset	Discerning and Sharing Our Gifts	\$3,000
All Saints' Church	Stoneham	Children's Christian Education and Formation Year II	\$2,850
St. Thomas's Church	Taunton	Congregational Development	\$3,100
Epiphany Church	Walpole	Using the Past for Future Growth	\$4,000
Church of the Holy Spirit	Wayland	Outdoor Worship	\$5,200
All Saints' Church	West Newbury	All Saints Garden of Serenity	\$6,000
All Saints' Church	Whitman	All Saints Support Communities	\$4,000
			<b>\$189,300</b>

<b>Congregational Development Targeted Grants</b>			<b>\$70,000</b>
<b>Congregation</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
All Saints' Church	Attleboro	Small Churches	\$7,500
St. Mary's Church	Dorchester	Congregational Development	\$5,000
Epiphany Church	Walpole	A Special Grace	\$8,200
Diocesanwide	Diocesanwide	Partners for Sacred Spaces	\$11,000
			<b>\$31,700</b>

<b>House of Mercy Deanery Grants</b>			<b>\$26,148</b>
<b>Congregation</b>	<b>City</b>	<b>Project</b>	<b>Grant Amount</b>
<b>Alewife Deanery</b>			
St. Paul's Church	Bedford	Charlie Cards for Homeless Families	\$720
St. Peter's Church	Cambridge	Afterworks	\$725
Christ Church	Waltham	Diaper Depot	\$725
<b>Boston Harbor Deanery</b>			
St. Stephen's Church	Boston	B-READY Afterschool Program	\$2,000
<b>Charles River Deanery</b>			
Parish of the Messiah	Auburndale	"WIN," Women and Children in Need	\$979
All Saints Parish	Brookline	Start-up Kitchen Baskets	\$600
Christ Church	Needham	Circle of Hope	\$600
<b>Concord River Deanery</b>			
St. Michael's Church	Holliston	Le Chef Program	\$1,000
<b>Merrimack Valley Deanery</b>			
St. John's Church	Lowell	Harmony Youth Program	\$726
<b>Mt. Hope-Buzzards Bay Deanery</b>			
Church of the Holy Spirit	Fall River	Reawakening of the Displaced	\$2,000
St. Andrew's Church	New Bedford	Parent Drop-In Center	\$2,000*
<b>Mystic Valley Deanery</b>			
Grace Church	Everett	A Better Tomorrow Services	\$500
St. John's Church	Saugus	Every Child Deserves to Smile	\$1,500
<b>Taunton River Deanery</b>			
Bristol Cluster	Taunton	H.U.G.S; Cranwood; Mills Fund	\$2,179
			<b>\$14,254</b>

Sending Serving Deanery Grants			\$48,000
Congregation	City	Project	Grant Amount
<b>Alewife Deanery</b>			
St. Paul's Church	Bedford	Bedford Food Pantry Community Table	\$150
Christ Church	Cambridge	Outdoor Ministry/T Passes	\$250
St. James's Church	Cambridge	Helping Hand Food Pantry	\$1,600
St. Peter's Church	Cambridge	CommonCare	\$1,000
Christ Church	Waltham	Diaper Depot	\$1,000
<b>Boston Harbor Deanery</b>			
Cathedral Church of St. Paul	Boston	Pilgrim Newsletter	\$2,000*
St. Stephen's Church	Boston	Tech Center for Youth Program	\$2,000
St. Stephen's Church	Boston	B-READY Afterschool Program	\$2,000*
St. Mary's Church	Dorchester	St. Mary's Fresh Food Initiative	\$2,000
<b>Charles River Deanery</b>			
St. Dunstan's Church	Dover	Deepening Existing Haitian Partnerships	\$3,000
St. Andrew's Church	Wellesley	Barton Road Holiday Party	\$1,000
<b>Merrimack Valley Deanery</b>			
Trinity Church	Haverhill	Academy of Creative Arts at Trinity	\$1,000
St. Anne's Church	Lowell	Basic Computer Training and Conversational English for Immigrant Women	\$1,250
St. John's Church	Lowell	KALEIDOSCOPE Center for the Arts	\$1,250
<b>Mt. Hope-Buzzards Bay Deanery</b>			
St. Andrew's Church	New Bedford	Parent Drop-In Center	\$4,000
Church of Our Saviour	Somerset	Annual Parish Retreat	\$1,000*
<b>Mystic Valley Deanery</b>			
Grace Church	Everett	A Better Tomorrow Services	\$3,500
St. John's Church	Saugus	Every Child Deserves to Smile	\$500
<b>North Shore Deanery</b>			
St. Peter's Church	Beverly	St. Peter's Outreach Meals	\$500
St. Stephen's Church	Lynn	Christmas Presents for Pantry Kids	\$2,000
<b>South Shore Deanery</b>			
Emmanuel Church	Braintree	Kid's Clothing Closet	\$1,000
Trinity Church	Marshfield	Sowing Seeds	\$1,000
Christ Church	Quincy	Essentials Pantry	\$1,000
St. Stephen's Church	Cohasset	Long Island Shelter	\$1,000
* Represents addendum funding			\$30,000

Case Trust and Bristol County Fund			\$104,400
Congregation	City	Program	Grant Amount
All Saints' Church	Attleboro	Youth Music Program	\$2,130
Church of the Holy Spirit	Fall River	Senior Relief Fund/Homeless Ministry/Senior Fellowship/Holistic Health Project	\$15,000
St. Luke's Church	Fall River	Urban Youth Outreach Program	\$9,000
Grace Church	New Bedford	Community Breakfast; Vacation Bible School	\$5,500
St. Andrew's Church	New Bedford	Summer Program for Elementary School Aged Children and their Families	\$16,800
Grace Church	North Attleborough	Empowering Grace	\$25,000
St. Mark's Church	North Easton	My Brother's Keeper/House of Possibilities	\$2,500
Church of Our Saviour	Somerset	Amagoro Mission/Harambee Pen Pal Project	\$3,000
St. John's Church	Taunton	Vacation Bible School/Family Fellowship/Camping/Operation Christmas Child/Taunton State Hospital	\$6,000
St. Thomas's Church	Taunton	New Contemporary Mass/Interfaith Bridge Building/Senior Luncheon/Training for the Unemployed Mentally Challenged	\$18,550
			\$103,480

Creation Care Initiative: Simple Acts of Stewardship Grants			\$3,980
Congregation	City	Program	Grant Amount
Episcopal Boston Chinese Ministry	Boston	Reduce, Reuse, Recycle	\$1,000
St. Andrew's Church	New Bedford	Expansion of Church Garden to Community Garden	\$600
St. Luke's Church	Scituate	An Intergenerational 'Green' Summer Church	\$1,000
Trinity Church	Shirley	100 Simple Acts Campaign: Equipping God's People to Build Sustainable and Vital Communities	\$845
Church of the Good Shepherd	Watertown	Vacation Summer Garden School	\$535
			\$3,980

Creation Care Initiative: Green Improvement Grants			\$174,392
Congregation	City	Project	Grant Amount
Church of the Good Shepherd	Acton	Attic Insulation	\$5,450
Christ Church	Andover	New Windows in Thrift Shop	\$10,000
St. Peter's Church	Buzzards Bay	On-Demand DHW; dishwasher; low flow toilets	\$9,000
St. Bartholomew's Church	Cambridge	Convert boiler to natural gas, establish heating zones	\$10,000
Calvary Church	Danvers	Replace heating system	\$10,000
Grace Church	Everett	Convert from oil to natural gas; heating & hot water upgrades	\$10,000
St. John's Church	Franklin	Lighting upgrade for church and classrooms	\$10,000
St. John's Church	Gloucester	Emergency lighting; low flow toilets & faucet, aerators; LED bulbs; programmable thermostats	\$10,000
St. Andrew's Church	Hanover	New boiler and 6-zone system	\$10,000
Trinity Church	Haverhill	Lighting conversion; dishwasher; low flow toilets and faucets	\$10,000
St. Anne's Church	Lowell	Water, LED bulbs; interior storm windows	\$10,000
St. Andrew's Church	Methuen	Parish hall: energy-efficient windows; lighting; dropped ceiling	\$10,000
Grace Church	North Attleborough	Dual flush toilets; bulbs/fixtures; insulation; storm windows; refrigerators	\$10,000
St. Luke's Church	Scituate	Lighting & fixtures; refrigerators; window covering	\$10,000
Church of the Holy Name	Swampscott	Gas-fired furnace	\$10,000
Emmanuel Church	Wakefield	Replace boiler	\$10,000
Christ Church	Waltham	Attic Insulation	\$9,942
Church of the Good Shepherd	Watertown	Lighting & heating system	\$10,000
			\$174,392

<b>Mission Tithe Council Grant</b>			<b>\$25,000</b>
<b>Partnering Congregations</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
Seven Congregations:		Tatau Kenya (formerly Be The Change Kenya)	\$25,000
St. Mark's Church	Burlington		
Christ Church	Andover		
Church of Our Saviour	Somerset		
Church of the Holy Spirit	Mattapan		
St. Christopher's Church	Chatham		
St. James's Church	Cambridge		
St. Paul's Church	Bedford		

**2012 Continuing Education Grants**

<b>Congregation</b>	<b>City</b>	<b>Project</b>	<b>Grant Amount</b>
St. Stephen's Church	Boston	Northeast Deacons National Conference	\$437
Grace Chapel	Brockton	Episcopal Divinity School D. Min Program	\$500
St. Luke's/San Lucas Church	Chelsea	Diocesan Pilgrimage to Israel & Palestine	\$500
St. Barnabas's Church	Falmouth	Diocesan Pilgrimage to Israel & Palestine	\$500
St. Andrew's Church	Framingham	Instruction in Portuguese	\$500
Trinity Church	Haverhill	National Voluntary Organization Assisting in Disaster Conference	\$500
St. John's Church	Jamaica Plain	Boston College Training Class	\$500
St. Anne's-in-the-Fields Church	Lincoln	International Conference on Peace and Reconciliation	\$500
St. Paul's Church	Lynnfield	Interim Ministry Training	\$500
Grace Church	Medford	The Gathering Clergy Conference	\$500
St. Michael's Church	Milton	Appreciative Inquiry Training	\$500
Church of the Holy Spirit	Orleans	Deacon's Conference	\$225
St. Luke's Church	Scituate	CREDO for Recently Ordained Clergy	\$500
St. Mark's Church	Southborough	Gathering of Leaders Conference	\$330
Christ Church	Waltham	Diocesan Pilgrimage to Israel & Palestine	\$500
St. Peter's Church	Weston	Biblical Wisdom for Post-Biblical Times	\$250
			<b>\$7,242</b>

**Sabbatical Funds**

<b>Congregation</b>	<b>City</b>	<b>Grant Amount</b>
Episcopal Diocese of Massachusetts	Boston	\$4,000
Church of the Holy Nativity	South Weymouth	\$600
St. Elizabeth's Church	Sudbury	\$1,500
Christ Church	Swansea	\$4,000
Bristol Cluster	Taunton	\$4,600
Church of the Epiphany	Walpole	\$4,000
		<b>\$18,700</b>

**Bishops' Funds**

Aid to Clergy	8 grants	\$8,375
Aid to Congregations	8 grants	\$14,565
Children's Program not including B-SAFE	2 grants	\$16,500
Mission and Outreach	7 grants	\$80,140
		<b>\$119,580</b>

<b>Clergy Children College Scholarships</b>	14 students	<b>\$46,000</b>
---	-------------	-----------------

<b>Society for the Relief of Aged or Disabled Clergy</b>	Served 45 clergy	<b>\$127,790</b>
--	------------------	------------------

<b>Society for the Relief of Widows, Widowers and Orphans of Clergy</b>	Served 36 widows	<b>\$68,999</b>
---	------------------	-----------------

<b>Stokes Fund Loans</b>	8/31/2013 Balance	<b>\$2,554,274</b>
--------------------------	-------------------	--------------------

89 Loans		
	6 Churches	2-5 months in arrears
	3 Churches	8-13 months in arrears
	80 Churches	Current

## Appendix 4: Staff Roster

### 2013 DIOCESAN STAFF POSITIONS BY AREA

Position	Incumbent
<b>DEANERIES, CONGREGATIONS &amp; CLERGY</b>	
Canon for Congregations	The Rev. Canon Elizabeth Berman
Canon for Ordained Vocations	The Rev. Edie Dolnikowski
Administrative Assistant to Bishop Shaw	Ms. Jackie Drapeau
Director of Transition Ministries	The Rev. Jean Baptiste Ntagengwa
Administrative Assistant to Bishop Harris	Ms. Marsha Searle
<b>CONGREGATIONAL RESOURCES &amp; TRAINING</b>	
Missioner for Christian Education, Formation and Discipleship	Ms. Amy Cook
Director of Congregational Resources and Training	The Rev. Karen Montagno
Coordinator for Congregational Support	Mr. Stephen Pierce
Grants and Events Administrator	Ms. Esther Powell
Communications Assistant	Ms. Ellen Stuart
Director of Communications	Ms. Tracy Sukraw
<b>STRATEGIC MINISTRIES</b>	
Director, Life Together	The Rev. Arrington Chambliss
Vicar, St. Stephen's Church, Boston	The Rev. Timothy Crellin
Director, Youth Ministry	Mr. Samuel Gould
Chaplain, MIT	The Rev. Thea Keith-Lucas
Canon for Asiamerican Ministries	The Rev. Canon Connie Ng Lam
Managing Director, Life Together	Mr. Jason Long
Chaplain, Boston University	The Rev. Cameron Partridge
Chaplain, Boston College and Northeastern University	The Rev. Judith Stuart
<b>EPISCOPAL AND DIOCESAN SUPPORT</b>	
Assisting Bishop (effective February 2012)	The Rt. Rev. Bud Cederholm
Associate Director of Development	Ms. Alison Hay
Development Assistant	Ms. Mary Ann Lee
Director of Development	Mr. Lynd Matt
Administrative Assistant to the Canon to the Ordinary	Ms. Diane Pound
Project Manager for Campaign Initiatives	The Rev. Samuel Rodman
Administrator of Convention and Council	Ms. Laura Simons
Archivist	Vacancy
Director of Global Mission	Ms. Laura Walta
<b>ADMINISTRATIVE SERVICES</b>	
Senior Accountant	Ms. Dana Courtney
Controller	Ms. Cathy Menard
Manager, Information Technology	Mr. Jamie Reamer
Chief Business Officer and Assistant Treasurer	Mr. Richard Strout
Accountant	Ms. Patricia Superville
Manager, Human Resources	Vacancy
<b>DIOCESAN LEADERSHIP TEAM</b>	
Bishop Diocesan	The Rt. Rev. M. Thomas Shaw, SSJE
Bishop Suffragan	The Rt. Rev. Gayle Elizabeth Harris
Canon to the Ordinary	The Rev. Canon Mally Ewing Lloyd

### **Budget Committee**

Lisa Garcia (2013), Treasurer

Stephen Voysey (2013), Chair

Matthew Cadwell (2014)

Ellen Sheehy (2014)

Lynn Smith (2014)

Jane Bearden (2015)

Kevin Lynn (2015)

Virginia Rogers (2015)

Ted Ts'o (2015)

Rick Strout, Assistant Treasurer and Chief Business Officer

Mally Lloyd, Canon to the Ordinary

Laura Simons, Clerk



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