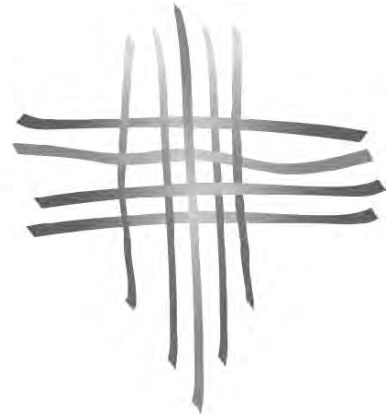


Episcopal Diocese
of Massachusetts



JOURNAL OF CONVENTION
2016

*Minutes and Papers of
the 231st Annual Diocesan Convention*

*Reports of Committees, Staff and
Related Organizations*

**THE EPISCOPAL DIOCESE
OF MASSACHUSETTS**

2016 DIOCESAN JOURNAL

of the

**TWO HUNDRED THIRTY-FIRST ANNUAL SESSION
OF THE DIOCESAN CONVENTION
NOVEMBER 4-5, 2016**

MINUTES AND PAPERS OF THE CONVENTIONS

REPORTS OF COMMITTEES,
STAFF AND RELATED ORGANIZATIONS

RECORD OF EPISCOPAL ACTS AND CLERGY RECORD

Diocesan Center: 138 Tremont Street
Boston, Massachusetts 02111

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NOTICE OF THE NEXT SESSION OF THE CONVENTION

The two hundred thirty-second Annual Session of the Convention of the Episcopal Diocese of Massachusetts will be held on Saturday, November 4, 2017, at the Cathedral Church of St. Paul in Boston, MA, at a time to be announced in the Canonical Notice which will be mailed to each member, clerical and lay, in October 2017.

Leon A. Brathwaite II
Secretary

The Episcopal Diocese of Massachusetts
138 Tremont Street
Boston, Massachusetts 02111

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Elected and Appointed Leadership

Unless otherwise indicated, addresses are:

Episcopal Diocese of Massachusetts, 138 Tremont St, Boston MA 02111

Officers of the Diocese	
Bishop The Rt. Rev. Alan M. Gates	O: 617-482-4826 x407 dpound@diomass.org
Bishop Suffragan The Rt. Rev. Gayle Elizabeth Harris	H: 781-538-5526 O: 617-482-4826 x445 msearle@diomass.org
Chancellor of the Diocese Edward Notis-McConarty Esq. Hemenway & Barnes 60 State St, Boston MA 02109	O: 617-557-9719 enm@hembar.com
Secretary Mr. Leon A. Brathwaite II PO Box 1263, Oak Bluffs MA 02557	H: 508-693-5810 lbrathwaite@diomass.org
Treasurer Ms. Lisa Garcia	H: 617-744-1808 lmgarcia001@aol.com
Assistant Treasurer Mr. Gerry Sullivan	O: 617-482-4826 x554 gsullivan@diomass.org
Assistant Secretary Ms. Laura Simons	O: 617-482-4826 x406 lsimons@diomass.org
Registrar-Historiographer Ms. Lynn Smith PO Box 1380, Duxbury MA 02331	H: 781-585-5923 O: 617-482-4826 x488 archivist@diomass.org
Ecumenical Officer Vacancy	

Diocesan Council	
<i>Elected from Deaneries</i> (term ends at Convention of year listed)	
Alewife	
Mr. Ted Ts'o (Church of Our Saviour, Arlington)	2016
The Rev. Joseph O. Robinson (Christ Church, Cambridge)	2016
Boston Harbor	
Vacancy	2018
The Rev. Thomas Mousin (St. John's Church, Charlestown)	2016
Cape & Islands	
Ms. Constance Melahoures (Christ Church, Plymouth)	2017
The Rev. Terry Pannell (Church of St. Mary of the Harbor, Provincetown)	2016
Charles River	
Mr. James Daniell (All Saints Parish, Brookline)	2016
The Rev. Joel Ives (Church of Our Saviour, Brookline)	2017
Concord River	
Mr. Win Treese (St. Elizabeth's, Sudbury)	2018
The Rev. Julie Carson (St. Andrew's Church, Framingham)	2016
Merrimack Valley	
Vacancy	2017
The Rev. Jane Bearden (Trinity Church, Haverhill)	2015
Mt. Hope-Buzzards Bay	
The Rev. Rebecca Blair (St. Andrew's Church, New Bedford)	2015
Ms. Carol Friar (St. Luke's Church, Fall River)	2015
Mystic Valley	
Mr. David Sullivan (Emmanuel Church, Wakefield)	2016
The Rev. Matthew Cadwell (Emmanuel Church, Wakefield)	2017
Neponset River	
Mr. Matt Harper-Nixon (St. Paul's Church, Dedham)	2017
The Rev. Rebecca Black (Christ Church, Medway)	2016
North Shore	
Mr. Christopher Trahan (St. Stephen's Church, Lynn)	2016
The Rev. Debbie Phillips (Grace Church, Salem)	2017
South Shore	
Mr. Dan Clevenger (Parish of St. Chrysostom, Quincy)	2015
The Rev. Grant Barber (St. Luke's Church, Scituate)	2016
Taunton River	
Mr. Rob Kelleher (Trinity Church, Bridgewater)	2017
The Rev. Meghan Sweeney (All Saint's Church, Attleboro)	2016

Diocesan Council <i>(continued)</i>	
Appointed by the Bishop	
Vacancy, Lay	2017
Mr. Billy Boyce (Grace Church, New Bedford)	2016
Ms. Claudette Hunt (St. Andrew's Church, Ayer)	2016
The Rev. George Stevens (St. Mary's Church, Newton Lower Falls)	2017
The Rev. Dr. Karen Coleman (St. James's Church, Somerville)	2016
Ms. Janine Whitter (St. Peter's Church, Cambridge)	2017
 Cathedral Chapter Representative	
Vacancy	2016
 Diocesan Youth Council Representatives	
Mr. Jonnathan Suarez Pena (St. Luke's/San Lucas, Chelsea)	2016
Mr. Josh Pang (St. Paul's Church, Brookline)	2016
 Diocesan Officers	
The Rt. Rev. Alan M. Gates, Bishop	
The Rt. Rev. Gayle E. Harris, Bishop Suffragan	
Mr. Leon A. Brathwaite II, Secretary	
Ms. Lisa Garcia, Treasurer	
 Executive Committee	
Ms. Claudette Hunt (St. Andrew's Church, Ayer)	
Ms. Connie Melahoures (Christ Church, Plymouth)	
The Rev. Joseph O. Robinson (Christ Church, Cambridge)	
Mr. Christopher Trahan (St. Stephen's Church, Lynn)	
The Rev. Rebecca Black (Christ Church, Medway)	
The Rev. Thomas Mousin (St. John's Church, Charlestown)	
Ms. Carol Friar (St. Luke's Church, Fall River)	
Ms. Lisa Garcia, Treasurer	
 Ex Officio	
Ms. Elizabeth Murray, President, Episcopal Church Women	
Mr. Gerry Sullivan, Assistant Treasurer	
Ms. Lynn Smith, Registrar-Historiographer	
Ms. Laura Simons, Assistant Secretary	

Standing Committee	
(term ends at Convention of year listed)	
The Hon. Judith Dilday (ret.), President	2016
The Rev. Amy McCreath, Vice President	2016
The Rev. Pamela Werntz, Secretary	2017
Mr. Wayne Kennard (appointed to fill term through 2016)	2016
Angela McConney Scheepers, Esq.	2018
The Rev. Chris Wendell	2018
The Rev. Andrew Stoessel	2019
Mr. John Iredale	2019
Staff: Ms. Laura Simons	
Commission on Ministry	
(term ends at Convention of year listed)	
Co-Chairs:	
Ms. Ella Davila Auchincloss	2016
Ms. Karon Gibson-Mueller	2016
The Rev. Edgar A. Gutierrez-Duarte	2016
Ms. Kay S. Ridgard	2016
The Ven. Patricia Zifcak	2016
The Rev. Miriam Gelfer	2017
The Rev. Sara Irwin	2017
The Rev. Edwin Johnson	2017
Mr. Graeme Mills	2017
Dr. Laura Crain	2018
The Rev. Eric Hillegas	2018
The Rev. Sara Kelb	2018
Ms. Branwen Smith-King	2018
The Rev. Daniel Horgan	2018
Chaplain to Postulants and Candidates:	
The Rev. Dr. David Killian	
Examining Chaplain:	
The Rev. Dr. Libby Gibson	2017
Staff: The Rev. Canon Dr. Edith W. Dolnikowski (Edie)	

Deputies to General Convention 2015	
<u>Clerical</u> The Rev. Canon Mally Ewing Lloyd The Rev. Thomas Brown The Rev. Jane S. Gould The Rev. Edwin Johnson	<u>Lay</u> The Hon. Byron Rushing Dr. Fredrica Harris Thompsett Mr. Samuel J. Gould Ms. Sarah Neumann
Alternate Deputies to General Convention 2015	
<u>Clerical</u> The Rev. Holly Antolini The Rev. Karen B. Montagno The Rev. Julie Carson The Rev. Canon Connie Ng Lam	<u>Lay</u> Mr. William Boyce Ms. Julie Shea Ms. Betsy Ridge Madsen Ms. Michele Griffin-MacGregor
Deputies and Alternates to Provincial Synod	
<u>Clerical</u> Deputy: The Rev. Karen Coleman Alternate: The Rev. Rebecca Black	<u>Lay</u> Deputy: Ms. Rebecca Alden Alternate: Ms. Julie Watt Faqir
Diocesan Disciplinary Board (elected by Convention; term ends at Convention of year listed)	
<u>Clerical</u> The Rev. Christine Whittaker 2016 The Rev. Chris Wendell 2016 The Rev. Andrew Stoessel 2017 The Rev. Scottie Wagner 2018 The Rev. Kathleen Lonergan 2018	<u>Lay</u> Mr. Tom Peltz 2016 Ms. Barbara J. Fenner 2017 Ms. Julie Shea 2017 Mr. Dan Clevenger 2018

Cathedral Chapter**Bishop**

The Rt. Rev. Alan M. Gates

Bishop Suffragan

The Rt. Rev. Gayle E. Harris

Episcopal Presence

The Rt. Rev. Barbara C. Harris

Dean

The Very Reverend John P. Streit, Jr.

Canons

The Reverend Canon Dr. Katharine C. Black

The Reverend Canon Connie Ng Lam

The Reverend Canon Cristina Rathbone

The Reverend Canon Edward W. Rodman

Chancellor

Vacancy

Treasurer

Ms. Jane V. Peyrouse

Clerk

Vacancy

Assistant Treasurer

Mr. Gerald Sullivan

Assistant Clerk/Recording Secretary

Ms. Ethel L. Crawford

Term Expires January 2017

Mr. W. Loren Gary (elected by Cathedral Congregation) 2-year term

lay vacancy (elected by Cathedral Chapter) 3-year term

The Rev. Patrick C. Ward (elected by Convention) 3-year term

Ms. Jennifer McCracken (elected by Convention) 3-year term

Term Expires January 2018

Mr. James Van Looy (elected by Cathedral Congregation) 2-year term

Ms. Michele Griffin-MacGregor (elected by Cathedral Chapter) 3-year term

clergy vacancy (elected by Convention) 3-year term

Ms. Betsy Munzer (elected by Convention) 3-year term

Term Expires January 2019

Ms. Myra Anderson (elected by Cathedral Chapter) 3-year term

The Rev. Cameron E. Partridge (elected by Convention) 3-year term

Ms. Mary Beth Mills-Curran (elected by Convention) 3-year term

2016 DIOCESAN STAFF POSITIONS BY AREA

Position	Incumbent
DEANERIES, CONGREGATIONS & CLERGY	
Canon for Congregations	The Rev. Canon Elizabeth Berman
Senior Consultant for Congregations	Mr. Lawrence Civale
Administrative Assistant	Mr. Andrew Del Pilar
Canon for Ordained Vocations	The Rev. Canon Edie Dolnikowski
Program Director for Mission Hubs	Ms. Jin Min Lee
Director for Transition Ministries	The Rev. Jean Baptiste Ntagengwa
Administrative assistance	Ms. Suzette Phillips
Administrative assistance (Commission on Ministry)	The Ven. Patricia Zifcak
CONGREGATIONAL RESOURCES & TRAINING	
Missioner for Christian Education, Formation and Discipleship	Ms. Amy Cook
Communications Assistant	Ms. Ellen Stuart Kittle
Director of Congregational Resources and Training	The Rev. Karen Montagno
Director of Communications	Ms. Tracy Sukraw
Grants Administrator	Ms. Lauren Zook
Hispanic Missioner	Vacancy
STRATEGIC MINISTRIES	
Executive Director, Life Together	Ms. Kelsey Rice Bogdan
Vicar, St. Stephen's Church, Boston	The Rev. Timothy Crellin
Director of Operations, Life Together	Ms. Kendyll Hillegas
Chaplain, MIT	The Rev. Thea Keith-Lucas
Canon for Asiamerican Ministries	The Rev. Canon Connie Ng Lam
Youth Ministry Administrator	Mr. Sam Lovett
Chaplain, Boston University	The Rev. Cameron Partridge
Director, Youth Ministry	The Rev. H. Mark Smith
Chaplain, Boston College & Northeastern	The Rev. Judith Stuart
Project Director for Global Mission	Ms. Laura Walta
EPISCOPAL AND DIOCESAN SUPPORT	
Bishop	The Rt. Rev. Alan M. Gates
Bishop Suffragan	The Rt. Rev. Gayle E. Harris
Director of Development	Mr. Lynd Matt
Canon to the Ordinary	The Rev. Canon William Parnell
Executive Assistant to Bishop Gates	Ms. Diane Pound
Acting Chief of Staff	The Rev. Samuel Rodman
Administrative Assistant to Bishop Harris	Ms. Marsha Searle
Administrator, Convention and Council	Ms. Laura Simons
Development Assistant	Ms. Casey Zierler

2016 DIOCESAN STAFF POSITIONS BY AREA

Position	Incumbent
ADMINISTRATIVE SERVICES	
Manager, Human Resources	Ms. Cindy Cushman
Accountant	Ms. Marilyn Govoni
Controller	Mr. Charles Jordan
Coordinator for Congregational Properties	Mr. Stephen Pierce
Manager, Information Technology	Mr. Jamie Reamer
Chief Business Officer and Assistant Treasurer	Mr. Gerry Sullivan
Accountant	Ms. Patricia Superville
Archivist	Vacancy

LIST OF PARISHES, CONGREGATIONS, CHAPELS AND MISSIONS

I.

The Cathedral Church of St. Paul, Tremont Street, Boston.
 Organized as a parish, 1819, and admitted to Union, 1820.
 Established as the Cathedral Church, 1912. Incorporated
 March 5, 1908.

II.

PARISHES IN UNION WITH THE CONVENTION, WITH DATES OF ORGANIZATION AND ADMISSION

Parishes in italics were closed in 2016 (or before)

	Organized	Admitted into union	Incorporated
Acton, Good Shepherd.....	1958	1961	1964
Amesbury, St. James'	1833*	1836	1846
Andover, Christ Church	1835	1837	1836
Arlington, Our Saviour	1916	1945	1971
Arlington, St. John's	1876	1884	1964
Attleboro, All Saints'	1890	1924	1914
Ayer, St. Andrew's	1898	1902	1898
Barnstable, St. Mary's	1893	1928	1888
Bedford, St. Paul's.....	1955	1958	
Belmont, All Saints'	1894	1903	1927
Beverly, St. Peter's	1863	1867	1864
Beverly Farms, St. John's.....	1902	1915	1912
Boston, Advent.....	1844	1845	1844
" All Saints' (Dorchester)	1874	1875	1885
" Christ Church (Hyde Park).....	1861	1862	1860
" Emmanuel.....	1860	1862	1860
" Emmanuel (West Roxbury).....	1893	1898	1897
" Holy Spirit (Mattapan)	1886	1898	1897
" St. Augustine's & St. Martin's.....	1885	1972	1982
" St. Cyprian's (Roxbury)	1910	1945	1964
" St. John's (Charlestown)	1840	1840	
" St. John's & St. James' (Roxbury)	1832	1872	1871
" St. John's (Jamaica Plain)	1841	1842	1842
" <i>St. John the Evangelist</i>	<i>1883</i>	<i>1985</i>	
" St. Mark's (Dorchester).....	1906	1908	1906
" St. Mary's (Dorchester).....	1847	1848	1847
" Trinity	1733	1785	1830

* "About 1745." "The Chapel of King George the First."

	Organized	Admitted into union	Incor- porated
Braintree, Emmanuel.....	1906	1922	1921
Bridgewater, Trinity.....	1747	1785	1815
Brookline, All Saints'.....	1894	1896	1895
" Our Saviour.....	1867	1869	1868
" St. Paul's.....	1849	1850	1849
Burlington, St. Mark's.....	1958	1978	1979
Buzzard's Bay, St. Peter's.....	1938	1956	1975
Cambridge, Christ Church.....	1759	1901	1794
" St. Bartholomew's.....	1908	1945	
" St. James'.....	1866	1868	1866
" St. Peter's.....	1842	1843	1842
Canton, Trinity.....	1885	1918	1918
Chatham, St. Christopher's.....	1963	1964	1972
Chelmsford, All Saints'.....	1867	1959	1867
Cohasset, St. Stephen's.....	1896	1905	1931
Concord, Trinity.....	1883	1889	1908
Danvers, All Saints'.....	2013	2013	
<i>Danvers, Calvary.....</i>	<i>1858</i>	<i>1859</i>	<i>1978</i>
Dedham, Good Shepherd.....	1877	1878	
" St. Paul's.....	1731	1785	1818
Dover, St. Dunstan's.....	1967	1974	
Duxbury, St. John the Evangelist.....	1887	1946	1951
Easton (North), St. Mark's.....	1916	1999	
Edgartown, St. Andrew's.....	1895	1967	1965
Everett, Grace.....	1886	1892	1923
Fairhaven, Good Shepherd.....	1905	1983	1983
Fall River, Holy Spirit.....	2008	2008	2009
" St. Luke's.....	1897	1922	1897
Falmouth, Messiah (Woods Hole).....	1852	1856	1857
" St. Barnabas'.....	1886	1890	1888
Foxboro, St. Mark's.....	1893	1947	1893
Framingham, St. Andrew's.....	1894	1944	
Franklin, St. John's.....	1898	1961	1962
Gloucester, St. John's.....	1863	1864	1874
Groveland, St. James'.....	1873	1875	
Hamilton & Wenham, Christ Church.....	1922	1929	1925
Hanover, St. Andrew's.....	1727	1785	1797
Harwich Port, Christ Church.....	1954	1961	
Haverhill, Trinity.....	1855	1858	1961
Hingham, St. John the Evangelist.....	1882	1890	1978
Holbrook, St. John's.....	1914	1963	
Holliston, St. Michael's.....	1959	1962	1920
Hopkinton, St. Paul's.....	1743	1821	1819
Hudson, St. Luke's.....	1895	1945	1871
Ipswich, Ascension Memorial.....	1867	1878	1947
Lawrence, Grace.....	1846	1847	1951
Lexington, Our Redeemer.....	1884	1894	1884

	Organized	Admitted into union	Incor- porated
Lincoln, St. Anne's	1874	1875	1981
Lowell, St. Anne's	1824	1828	
" St. John's	1860	1862	
Lynn, St. Stephen's Memorial	1839	1839	1844
Lynnfield, St. Paul's	1918	1958	1958
Malden, St. Paul's	1867	1868	1870
Mansfield, St. John the Evangelist	1898	1946	1966
Marblehead, St. Andrew's Memorial	1928	1944	1933
" St. Michael's	1714	1785	1799
Marion, St. Gabriel's (c. 1871)	1875	1953	
Marshfield, Trinity	1742	1961	1790
Medfield, Advent	1904	1952	
Medford, Grace (complete 1855)	1848	1849	1848
Medway, Christ Church	1885	1952	1962
Melrose, Trinity	1857	1858	1857
Methuen, St. Andrew's	1878	1951	1928
Middleboro, Our Saviour	1894	1895	1894
Milton, Our Saviour	1897	1999	
Milton, St. Michael's	1895	1901	1896
Nantucket, St. Paul's	1847	1847	1908
Natick, St. Paul's	1871	1876	1871
Needham, Christ Church	1895	1931	1895
New Bedford, Grace	1833	1834	1834
" St. Andrew's	1923	1949	1923
" St. Martin's	1895	1897	1895
Newburyport, St. Paul's	1711	1875	1794
Newton, Good Shepherd (Waban)	1908	1910	1908
" Grace	1855	1858	1856
" <i>Messiah (Auburndale)</i>	1871	1873	1871
" Redeemer (Chestnut Hill)	1886	1892	1890
" St. John's (Newtonville)	1897	1922	1900
" St. Mary's (Newton Lower Falls)	1812	1814	1813
" St. Paul's (Newton Highlands)	1884	1888	1884
" Trinity (Newton Centre)	1889	1894	1892
North Andover, St. Paul's	1888	1901	1940
North Attleboro, Grace	1859	1860	1978
North Billerica, St. Anne's	1886	1959	
Norwood, Grace	1907	1920	
Orleans, Holy Spirit	1933	1946	1962
Osterville, St. Peter's	1903	1976	
<i>Peabody, St. Paul's</i>	1874	1924	
Plymouth, Christ Church	1844	1845	1946
Provincetown, St. Mary's	1933	1946	
Quincy, Christ Church	1704	1785	1813
" St. Chrysostom's (Wollaston)	1892	1905	1894

	Organized	Admitted into union	Incor- porated
Randolph, Trinity	1913	1956	1961
Reading, Good Shepherd	1920	1926	1920
Rockland, Trinity	1914	1944	
Rockport, St. Mary's	1886	1956	
Salem, Grace	1858	1860	1859
" St. Peter's	1733	1790	1794
Sandwich, St. John's.....	1854	1956	1969
Saugus, St. John's.....	1883	1944	1949
Scituate, St. Luke's.....	1957	1961	1974
Sharon, St. John's	1899	1945	
Shirley, Trinity	1901	1984	
Somerset, Our Saviour	1939	1945	1939
Somerville, Christ Church.....	1908	1956	1909
" St. James' (West)	1887	1889	
South Dartmouth, St. Peter's	1957	1961	1963
Southborough, St. Mark's.....	1860	1863	1863
Stoneham, All Saints'	1907	1960	
Stoughton, Trinity	1894	1956	1988
Sudbury, St. Elizabeth's.....	1947	1961	1962
Swampscott, Holy Name.....	1889	1893	1891
Swansea, Christ Church	1846	1846	1974
Taunton, St. John's	1866	1868	1992
" St. Thomas'	1728	1792	1820
Topsfield-Boxford, Trinity.....	1957	1960	1960
Vineyard Haven, Grace	1882	1942	1942
Wakefield, Emmanuel	1870	1871	1958
Walpole, Epiphany	1887	1911	1887
Waltham, Christ Church.....	1849	1849	1849
Wareham, Good Shepherd	1867	1922	1921
Watertown, Good Shepherd	1886	1891	1954
<i>Wayland, Holy Spirit.....</i>	<i>1961</i>	<i>1963</i>	<i>1961</i>
Wellesley, St. Andrew's	1891	1893	1894
Westford, St. Mark's.....	1961	1962	1962
Weston, St. Peter's.....	1913	1924	
Westwood, St. John's	1953	1959	
Weymouth, Holy Nativity (South).....	1920	1945	1920
" <i>Trinity</i>	<i>1867</i>	<i>1869</i>	<i>1959</i>
Whitman, All Saints'	1908	1953	1908
Wilmington, St. Elizabeth's.....	1986	1984	
Winchester, Epiphany	1888	1889	1888
Winthrop, St. John's	1885	1902	1901
Woburn, Trinity.....	1867	1868	
Wrentham, Trinity.....	1863	1867	1962
Yarmouth, St. David's	1966	1974	1976

NOTES:

- The Bristol Cluster comprises St. Mark's Church, North Easton; The Church of St. John the Evangelist, Mansfield; and St. John's Church, Taunton
- Calvary, Danvers and St. Paul's, Peabody merged in 2013 to create All Saints' Episcopal Church of the North Shore, Danvers
- Messiah, Auburndale and Trinity, Newton Centre merged in 2015 using the Trinity corporation entity for the combined parishes

III.

MISSION CHURCHES IN UNION WITH THE CONVENTION

	Organized	Admitted into union	Incor- porated
Boston, St. Andrew's/Grace Federated (East)	1900	1924	
" San Juan	1986	1986	
" St. Stephen's	1892	1945	
<i>Brockton, St. Paul's</i>	<i>1890</i>	<i>1892</i>	<i>1892</i>
Chelsea, St. Luke's/San Lucas	1841	1842	1844
<i>Lynn, St. Alban's</i>	<i>1885</i>	<i>1887</i>	<i>1885</i>
<i>Natick, St. Andrew's</i>	<i>1892</i>	<i>1960</i>	
<i>Pepperell, St. David's</i>	<i>1986</i>	<i>1988</i>	
West Newbury, All Saints'	1910	1923	1959

IV.

CONGREGATIONS, CHAPELS AND MISSIONS WITH DATES OF ORGANIZATION

	Organized	Admitted into union	Incor- porated
Boston, Christ Church	1722		1789
Groton, St. John's Chapel	1900		
Hyannis Port, St. Andrew's Chapel	1898		
Manchester, Emmanuel	1882		
Mattapoisett, St. Philip of Bethsaida	1883		
North Andover, Brooks School	1926		
Oak Bluffs, Trinity Chapel	1883	1983	1983
Southboro, St. Mark's School Chapel	1894		
South Dartmouth, St. Aidan's	1917		1945
Wellfleet, St. James the Fisherman	1951	1985	1956

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2016			
First Name	Middle Name	Last Name	Suffix
Anoma		Abeyaratne	
Thomas	E.	Adams	Jr.
Abraham	C.	Allen	
David	Edward	Allen	
David	Eastman	Allen	SSJE
Joel		Almono	
Curtis	G.	Almquist	SSJE
Rospignac		Ambroise	
Juliana	C.	Anderson	
Shirley	M.	Andrews	
David	M.	Angelica	
Mark	S.	Anschutz	
Holly	L.	Antolini	
Robert	B.	Appleyard	Jr.
Richard	S.	Armstrong	
Zenetta	M.	Armstrong	
Margaret	L.	Arnold	
Russell	C.	Ayers	
Ramon	I.	Aymerich	
Stephen	T.	Ayres	
Robert		Bacon	Jr.
Robert	R.M.	Bagwell	
Frank	D.	Baker	
Grant	W.	Barber	
Richard	E.	Bardusch	
David	M.	Barney	
G. Stewart		Barns	
Patricia	R.	Barrett	
E. Tom		Barrington	Jr.
Thomas	A.	Bartlett	
Charles	D.H.	Barton	
John	T.	Beach	
Jane	Bostick	Bearden	
Robert	J.	Bela	
Cynthia		Bell	
Robert	A.	Bennett	
Bruce	L.	Benshoff	
Elizabeth	S.	Berman	
Daniel	L.	Bernier	
Alden		Besse	
Karen	Z.	Bettacchi	
Christiaan	A.	Beukman	
Michael		Billingsley	
Harold	G.	Birkenhead	
Katharine	C.	Black	

Rebecca		Black	
Rebecca	H.	Blair	
Barry	M.	Bloom	
W. E. Douglas		Bond	
Anne	B.	Bonnyman	
Steven	C.	Bonsey	
Dean	W.	Borgman	
V. Michael		Bousquet	
Jeffrey	H.	Boyd	
Stephanie	Chase	Bradbury	
William	J.	Bradbury	
Lyn	G.	Brakeman	
James	P.	Breeden	
Christian	F.	Brocato	
R.	John	Brockmann	
Sarah	J.	Brockmann	
Henderson	L.	Brome	
Harold	R.	Bronk	Jr.
Clifford	R.	Brown	
R. Mark		Brown	SSJE
Thomas	J.	Brown	
Gwen	L.	Buehrens	
Anthony	F.	Buquor	
Richard		Burden	
Alden	R.	Burhoe	
Richard	E.	Burke	
Whitney	H.	Burr	
Matthew		Cadwell	
Joyce	C.	Caggiano	
Lynn		Campbell	
Edward	M.	Cardoza	
Julie	A.	Carson	
Frank	S.	Caruso	
Roy	F. "Bud"	Cederholm	Jr.
R. Arrington		Chambliss	
Susan	Esco	Chandler	
Constance		Chandler-Ward	
George	M.	Chapman	
James	D.	Chapman	
Tansy		Chapman	
Peter	G.	Chase	
Randall		Chase	Jr.
Alison		Cheek	
Michael	R.	Cheney	
Sharon	L.	Ciccarelli	
Scott	A.	Ciosek	
Bradford		Clark	

Jacqueline		Clark	
Judith	F.	Clark	
Richard	T.	Clark	
John	R.	Clarke	
Thomas	G.	Cleveland	
Ann	S.	Coburn	
Suzanne	F.	Colburn	
Theodore		Cole	Jr.
Karen		Coleman	
Jeremi	A.	Colvin	
Louise	R.	Conant	
John	H.	Conn	
Walter	J.	Connelly	Jr.
Sarah	Amy	Conner	
Michael		Corrigan	
Gay	P.	Cox	
Roger	Weldon	Cramer	
John	D.	Crandall	
Marcus	T.	Crapsey	II
Malia		Crawford	
Timothy	E.	Crellin	
Kate		Cress	
Margot		Critchfield	
Daniel	F.	Crowley	
Joao	A.A.	d'Alcaravela	
Alexander	S.	Daley	
Jennifer	Grumhaus	Daly	
Michael	B.	Dangelo	
Rainey		Dankel	
Charles	Laskin	David	
E. Gale		Davis	
Judith	A.	Davis	
Robert	C.	Day	
John		de Beer	
Patricia	J.	de Beer	
Chitral	S.	de Mel	
Marya	L.	DeCarlen	
Laurel	P.	Deery	
E. Robert		Dickson	Jr.
Edith	W.	Dolnikowski	
Mary Jane		Donohue	
Ennis		Duffis	
Donald	M.	Dunbar	
Marc	G.	Eames	
Richard	F.	Ebens	
Malcolm	D.	Eckel	
William	W.	Eddy	

Jonathan	T.	Eden	
Mark	D.W.	Edington	
Robert	D.	Edmunds	
Robert	B.	Edson	
Marisa		Egerstrom	
Katherine	B.	Ekrem	
C. Clyde		Elledge	II
Kathryn	N.	Elledge	
Gareth	C.	Evans	
Katharine	C.	Evans	
Noah	H.	Evans	
Isaac		Everett	
Norman	J.	Faramelli	
Manuel	P.	Faria	III
Thomas	C.	Ferguson	
John	A.	Fesq	
Elise		Feyerherm	
Heidi	A.	Fieldston	
Christopher	J.	Fike	
John	H.	Finley	IV
Paige	F.	Fisher	
Sue		Fisher Seeger	
Jessica		Flaherty	
Philip	J.	Flaherty	
Alden	B.	Flanders	
Francis		Fornaro	
E. Louise		Forrest	
Lisa	R.	Fortuna	
Virgilio		Fortuna	BSG
Dwight	C.	Fortune	
Pamela	L.	Foster	
Anne	C.	Fowler	
L. Nelson		Foxx	
Karen	A.	Fraioli	
Ann	H.	Franklin	
Julian	K.	Fredie	Jr.
David	A.	Fredrickson	
Warren	G.	Freeman	
Stephen	A.	Fregeau	
Christen	S.	Frothingham	
Harold	W.	Garbarino	
Anne	E.	Gardner	
G. Kenneth		Garrett	
Alan	M.	Gates	
Judith	S.	Gay	
Susan	L.	Geissler-O'Neil	
Miriam	C.	Gelfer	

Maggie		Geller	
Cathy	H.	George	
Rebecca	B.	Gettel	
Elizabeth		Gibson	
James	K.	Githitu	
Charles	L.	Glenn	
Patricia	D.	Gober	
Wallace	G.	Gober	
Michael	J.	Godderz	
Andrew		Goldhor	
Mary	M.	Gonzalez	
Elizabeth		Good	
Billie Mae		Gordon	
Martin	J.	Goshgarian	
Nancy	E.	Gossling	
Jane	S.	Gould	
Eleanore	L.	Gowen	
Patrick	T.	Gray	
Robert	C.	Greiner	
Gretchen		Grimshaw	
Margaret	B.	Gunness	
Edgar		Gutierrez-Duarte	
Addison	C.	Hall	
Lisbeth	J.	Hall	
W. Michael		Hamilton	
Robert	L.	Hammett	
Patricia		Handloss	
Kim	E.	Hardy	
Stanley	P.	Hardy	
Catherine	A.	Harper	
Barbara	C.	Harris	
Gayle	Elizabeth	Harris	
Merritt	R.	Harrison	
Holly		Hartman	
Michael		Hartwell	
Bret	B.	Hays	
Charles	C.	Hefling	
Scott	H.	Helferty	
Alan	R.	Hesse	
William	B.	Heuss	
Carter		Heyward	
Eric	M.	Hillegas	
Edward	H.C.	Ho	
Michael	J.	Hodges	
Marsha	H.	Hoecker	
Therese		Hofmann	
Megan		Holding	

Kristine	M.	Holmes	
Daniel	E.	Horgan	
James	H.	Hornsby	
Marguerite	A.	Howell	
Cynthia	P.	Hubbard	
Martha	L.	Hubbard	
Jennifer	S.	Hughes	
E. Bradlee		Hultman	
Donald	A.	Hunt	
Marshall	W.	Hunt	
Victoria	Wells	Hunt	
Carl	P.	Ijams	
Sara	H.	Irwin	
Donald	T.	Isaac	
Joel	M.	Ives	
Robert	S.	Jackson	
Philip	C.	Jacobs	III
Donald	W.	Jaikes	
F. Washington		Jarvis	
Harry		Jean-Jacques	
Peter	L.	Jeffrey	
Philip	E.	Jerauld	
Edwin	D.	Johnson	
Joan	Cotrell	Johnson	
Kenneth	W.	Johnson	
David	K.	Johnston	
Kenneth	L.	Jones	
Elizabeth	J.	Jordan	
Kapya	John	Kaoma	
Rosanna	Case	Kazanjian	
Victor	H.	Kazanjian	Jr.
Diane Dorothea		Keith-Lucas	
Sarah	D.	Kelb	
Brian	S.	Kelley	
Maureen	Dallison	Kemeza	
Thomas	B.	Kennedy	
Margery		Kennelly	
Edward	C.	Kienzle	
David	A.	Killian	
Allan	B.	King	Jr.
Benjamin	J.	King	
Elise		Kinney	
Hall		Kirkham	
James	C.	Knudson	
T. James		Kodera	
William	M.	Kondrath	
Beulah	C.	Koulouris	

Armand		Kreft	
Matthew	C.	Kruger	
Judith	S.	Krumme	
Philip	J.	Kuhn	
Philip	N.	LaBelle	
James	R.	LaMacchia	
Robert	D.	Landreth	
Gerard	M.	Lawrence	
Susan		Lederhouse	
Susan	H.	Lee	
Sean	T.	Leonard	
Kenrick		Lewis	
Matthew	J.	Lindeman	
Adam	S.	Linton	
Eric	R.	Litman	
Deborah	W.	Little Wyman	
Dorothella		Littlepage	
Mally	Ewing	Lloyd	
Samuel	T.	Lloyd	III
Bruce	A.	Lomas	
Kathleen	G.	Lonergan	
Richard	T.	Loring	
Raymond	A.	Low	
Daniel	K.	MacDonald	
Robert	A.	Mackie	
Katherine	M.	Malin	
Alice	B.	Mann	
Louise		Mann	
Michael	J.	Marrone	
Elizabeth		Marsh	
Robert	K.	Massie	
Ranjit	K.	Mathews	
Kathleen	A.	McAdams	
James	P.	McAlpine	
Terry	A.	McCall	
Melanie		McCarley	
Stephen	J.	McCarthy	Jr.
Amy		McCreath	
A. Homer		McCue	
Robert	B.	McFarlane	
John	E.	McGinn	
Jacqueline		McGrady	
Brian	W.	McGurk	
Devin		McLachlan	
John	N.	McLaughlin	
Lauren		McLeavey	
Michael	P.	Melendez	

Jeffrey	W.	Mello	
William	G.	Messenger	
Wendel	W.	Meyer	
David	R.	Milam	
Nancy	Elizabeth	Milholland	
Todd	L.	Miller	
Donald	A.	Milligan	
Christen	H.	Mills	
Lorraine	M.	Mills-Curran	
Cheryl	V.	Minor	
Paul	L.	Minor	
Anne	M.	Minton	
Karen	Brown	Montagno	
Eduardo		Monzon	
Christopher	R.	Morck	
Nicholas	M.	Morris-Kliment	
Jerry	D.	Morrow	
Roger	C.	Moulton	
Thomas	N.	Mousin	
Thomas	P.	Mulvey	Jr.
Joseph	T.	Mumita	
Rebecca	M.	Murphree	
Roger	E.	Nelson	
Jay	L.	Newberry	
Connie Miu Sheung		Ng Lam	
Bruce	E.	Nickerson	
Daphne	Bess	Noyes	
Jean	Baptiste	Ntagengwa	
Kevin	O.	Olds	
Robert	E.	Outman-Conant	
W. Russell		Page	Jr.
Eleanor	J.	Panasevich	
Pui-kong	Thomas	Pang	
Terry	R.	Pannell	
Cynthia	D.	Pape	
Barbara	D.	Parini	
Donald	H.	Parker	
Roy	E.	Parker	OHC
William	Clay	Parnell	
Charles	F.	Parthum	III
Richard	L.	Payne	
Bryan		Pearson	
Edwin	C.	Pease	
Catherine	Louise	Perkins	SSM
Barbara	Ann	Peterson	
Rachael		Pettengill-Rasure	
Deborah	A.	Phillips	

Jennifer	M.	Phillips	
Kathryn	Ann	Piccard	
Joseph	T.	Pinho	
Geoffrey	T.	Piper	
Louis	W.	Pitt	Jr.
Wanda		Pizzonia	
John Michael		Povey	
Rita		Powell	
Sharon	K.	Powers	
David		Prentice	
Phyllis	A.	Price	
Warren	R.	Radtke	
Brian		Raiche	
S. Lester		Ralph	
Sarah	A.	Randall	SSM
Cristina		Rathbone	
Nathaniel	T.	Reece	
Jennifer	B.	Reiley	
Maria	Regina	Retamal	
William	W.	Rich	
Susan	O.	Richmond	
Linda	H.	Ricketts	
Kathleen	Pakos	Rimer	
Adrian		Robbins-Cole	
Sarah		Robbins-Cole	
Joseph	O.	Robinson	
Michael		Robinson	
Paul	B.	Rodgers	
Edward	W.	Rodman	
Samuel	S.	Rodman	
Michael	J.	Roeske	
Laurie	Ann	Rofinot	
Timothy	James	Rogers	
Suzan	J.	Rolfe-Boutwell	
Yolanda	Antoinette	Rolle	
Silvestre	E.	Romero	
Ema		Rosero-Nordalm	
Carlton	T.	Russell	
Adele Marie		Ryan	SSM
John		Satula	
Noble F.		Scheepers	
Timothy	E.	Schenck	
Joyce	L.	Scherer-Hoock	
Kenneth		Schmidt	
William	J.	Schneider	
Susan	M.B.	Schwab	
Margaret	K.	Schwarzer	

Paul	M.	Schwenzfeier	
Vincent		Seadale	
Albert	N.	Sears	III
Nancy	H.	Shepherd	
Thomas	C.	Shepherd	
Robert	L.	Sherwood	
Michael	O.	Shirley	
David	J.	Siegenthaler	
Richard	J.	Simeone	
John	E.	Simson	
Herbert	C.	Skelly	
Claude	A.	Smith	
Gail	S.	Smith	
H. Mark		Smith	
John	F.	Smith	
Nancy	S.	Smith	
Stephen	V.	Smith	
Barbara	P.	Smith-Moran	
Susanna	J.	Snyder	
Tara	K.	Soughers	
Kevin	H.	Sparrow	
Adrian		Stair	
Elizabeth		Steinhauser	
Leslie	K.	Sterling	
Audrey	O'Brien	Stewart	
Matthew	W.	Stewart	
Natasha	F.	Stewart	
Andrew	J.	Stoessel	
Barbara	E.	Stowe	
Jon	C.	Strand	
John	P.	Streit	Jr.
Judith	L.	Stuart	
David	P.	Sullivan	
Maryalice		Sullivan	
Meghan	T.	Sweeney	
Andrea	S.	Taylor	
Mark	A.	Templeman	
Eleanor		Terry	
Evan	L.	Thayer	
Ronald	Creighton	Tibbetts	
Robert	W.	Tobin	
Paula	J.	Toland	
Michele	A.	Torres	
John	T.	Townsend	
Roy		Tripp	
Geoffrey	R.	Tristram	SSJE
David	B.	Van Dusen	

Sarah	A.	van Gulden	
Noah		Van Niel	
Stephen	O.	Voysey	
David	B.	Vryhof	SSJE
Karin	E.	Wade	
Suzanne	B.	Wade	
Mary Scott		Wagner	
Elsa	Ph.	Walberg	
Janice		Walden	
Harry	E.	Walton	
Regina Laba		Walton	
Sze-kar		Wan	
Patrick	C.	Ward	
Deborah	M.	Warner	
Allan	B.	Warren	III
Russell		Way	
James	M.	Weiss	
G. Truman		Welch	
James		Weldon	
George	H.	Welles	Jr.
Christopher		Wendell	
Peter	W.	Wenner	
Pamela	L.	Werntz	
George	A.	Westerberg	
Elizabeth		Wheatley-Dyson	
James	S.	Whitaker	
Bailey		Whitbeck	
Christopher	W.	Whiteman	
Elizabeth		Whitmore	
Christine	R.	Whittaker	
Joseph	W.	Wilkes	
Monrelle	T.	Williams	
Sandra		Williams	
Barbara	S.	Williamson	
Donald	R.	Wilson	
Robert	G.	Windsor	
Diane		Wong	
Gloria	L.	Wong	
Colette	Bachand	Wood	
Priscilla		Wood	
Sammy	L.	Wood	
J.C.		Woods	Jr.
James	Christopher	Woods	
Deborah	M.	Woodward	
Andrea	C.	Wyatt	
Charles	A.	Wynder	Jr.
jimichael		XIMENES-ENGELS	

Bruce	A.	Young	
Herbert	B.	Zalneraitis	
Luther		Zeigler	
Patricia		Zifcak	

*Bishop's Annual Address
Convention of the Diocese of Massachusetts
Saturday, November 5, 2016
Holiday Inn, Mansfield*

Most of you know that, during our 18-year sojourn away from Massachusetts, my family and I lived eight years in Chicago and 10 years in Cleveland. Thus, in the recent World Series, the question of whether our fan loyalty would lie with the Chicago Cubs or the Cleveland Indians loomed large.

The answer seemed easy enough. The Cubs had gone 40 years longer without a championship. The Cubs' perennial identity as lovable losers had always been familiar to us as pre-2004 Red Sox fans. Plus Wrigley Field and Fenway Park felt like familiar siblings. Naturally, we would cheer for the Cubs. ["Go, Cubs, Go!"]

But then Game One rolled around 10 days ago. Watching the game underway in Cleveland, I found myself pulling with all my might for the Cleveland team. Our 10 years in Ohio were, after all, more recent than those in Illinois. We attended far more games at Progressive Field than we had managed at Wrigley. More recent nostalgia was also at play--still missing our countless friends from St. Paul's whose eager excitement about this World Series was all over Facebook. ["O-H-I-O!"]

But my partisan pull to Cleveland was not just sentimentality. It has to do with what I hope for that city, far beyond its sports accomplishments or lack thereof. Throughout our decade there we were constantly struck (and often mystified) by the way Cleveland residents can seem so anxious for reassurance that their city is worthy of respect. Which, honestly, it really is! Cleveland has a venerable history, a spirit of civic responsibility, a warm and devoted populace and cultural institutions far beyond other cities of its size.

Cleveland was once the fifth largest city in the nation. But postwar economic transitions were hard on Cleveland. Some of the hits were especially humiliating. Infamously, in the 1960s, oil slicks would catch fire and burn on the Cuyahoga River. The image remained long after the ecological reality had changed.

The point is that too often Clevelanders are stuck feeling either nostalgic or defensive about their past, rather than attentive and hopeful about their future. As long as they are still hoping to reclaim the glory of Fifth-Largest-City Status, or feeling chagrined about flames on the Cuyahoga, they remain insecure about their solid, hopeful identity as a really fine, small city for the 21st century.

Which is why I was pulling for Cleveland in the World Series--as one more way for the city finally to look fully forward instead of back. As any Red Sox fan knows, it took 2004 for Boston finally to stop talking about the Bambino and poor Billy Buckner.

There's something about looking forward.

Embracing brave change

Now, I have been dwelling on Cleveland at some length because I find this same dynamic at play too often in our life in the church. Making my way around the Diocese of Massachusetts, I hear many testimonies to some previous era. “The pews of this church used to be packed,” I hear. “We used to have a church school class for every grade level,” I hear. “This parish always had two priests,” I hear. And I understand that in many places letting go of such history can be hard, the trajectory can seem discouraging. But, like Cleveland, remaining in a permanent state of wishing for some earlier time of perceived glory will not help us to face the future. Strategizing to recreate the church of the past will not reveal to us how to be the Church of Jesus Christ today and tomorrow. We must celebrate and give thanks for the blessings of our history, to be sure. And we must listen for new ways in which God is calling us to respond to the world, even now.

And this, my friends, is what is meant by “Embracing Brave Change.” And this is what our proposed mission strategy is all about.

If you are a Process Junkie, has this been a year for you! Listening sessions; focus groups; online surveys; phone surveys; theme coding sessions; initial draft; feedback sessions; revised draft; more feedback sessions--man, you were in pig heaven.

If you are *not* a Process Junkie, then maybe you are weary of it. And I understand this. I am not by nature enthralled by endless process. But here are three things I want to say about our mission strategy process these nine months:

First: We had three really strong teams to lead us in this work. Team One designed the process; Team Two carried out all that listening and data collection; and Team Three worked together with your bishops to distill and reflect, and craft the proposed mission strategy which is before you today. These are smart, talented, faithful people, committed to articulating what they’d heard from you, and what they were hearing from the Holy Spirit. And we owe them a debt of gratitude for their work.

Second: We’ve all heard that “the medium is the message.” In this case it is absolutely true that “the process has been essential to the message.” It has mattered to me that the process by which we have arrived at the proposed mission strategy be reflective of the way that I hope we can serve together as bishop and diocese in the years ahead: broadly participatory; deliberate; listening for the Holy Spirit; patient; transparent; imperfect--no doubt--and open to hearing about that; consensus-seeking; candid, yet hopeful. The mission strategy is, I believe, an honest yet hopeful product.

And third: This mission strategy strives to dwell between a 30,000-foot document that would have articulated general values and vision but be of no real use in guiding resource allocation and direction, or a 2,000-foot document that would have articulated a handful of tactical next steps, but be outdated very soon.

What we have is in between: a vision and some initial steps, while still requiring a good bit of strategic thinking, prioritizing, praying and fleshing-out. Those will be our steps in the next year and more.

At the heart of our mission strategy

So here it is before us. Let me say a word about the three primary planks that I believe are at the heart of this document: Reimagining Our Congregations; Building Our Diocesan Relationships; and Engaging Our World.

First plank, **Reimagining Our Congregations**. Let's imagine deepening our relationship with Jesus, and more readily sharing our story of faith. Let's imagine being able to focus less on our buildings and budgets and more on our mission in the world. Let's imagine models of leadership which uphold the ministry of all the baptized even more fully. Let's imagine more bi-vocational clergy, not as a solution to a management problem, but as an opportunity for even more bridges between church and world. Let's imagine small congregations thriving in equal measure alongside larger ones, each offering its own unique gifts.

I hear in our congregations a growing anxiety about the ground shifting under our feet. I hear a yearning to have hard conversations about resources early enough that creative options are still available. I hear from some who feel worn out by the challenges of sustaining their institutions, and from others who are really excited about new possibilities.

In today's reading from the prophet Jeremiah: "*Surely I know the plans I have for you, says the Lord, ... to give you a future with hope.*"

Dear friends, let's imagine that future!

The second plank: **Building Our Diocesan Relationships**. Let's build more working partnerships, and strengthen existing ones. Let's build better networks around common passions and challenges. Let's build better communication channels. Let's build ways for deeper conversation about racism and other forms of oppression. Let's build a community that fully recognizes and rejoices at the global Anglican presence which is right here in our own diocesan congregations. Let's build trust, so that we can begin to say "our diocese" instead of "the diocese," not just because the linguistically obsessed bishop asks us to, but because the web of our relationships truly makes it *our* diocese.

I hear that when folks engage in opportunities like Fall Resource Day, they experience a real strength of relationships. I also hear that folks in some areas feel disconnected from others or from the rest of our diocese. I hear that some of us experience our diocesan assessment as more of a tax or a membership fee than as a common share in joint mission, and I hope we can change that perception. I hear that when mutual support is known and experienced within our diocese, it is a very great gift.

We experienced that gift in this room yesterday when after the first 45 minutes or so of legislative procedures, necessary procedures and important ones and part of the work of the

church, we nonetheless were feeling, maybe, I'll say I was feeling a little bit sterile and spiritless in the process. And then we got invited into tables, into groups, into conversation, into sharing with one another about our hopes, and our experiences and our delights. And then we caught a glimpse of ourselves as community. Someone at my table said, This is why that icon of the Holy Trinity reminds us that it's in the nature of divinity to be in community. And I thought, wouldn't it be interesting if the icon of the Holy Trinity had its members sitting auditorium style, and one had a gavel. When we're really the Church, we know it and we sense it, because we know we are in community with one another.

In today's reading from Ephesians, Saint Paul invites us to "*grow ... into Christ, from whom the whole body, joined and knit together by every ligament, ... promotes the body's growth in building itself up in love.*"

Dear friends, let's build that body!

Third plank: **Engaging Our World.** Let's engage ever more fully in the mission orientation which so enlivens the Church. Let's engage in more collaboration with ecumenical and interfaith partners and all people of goodwill in our local communities. Let's engage, before it's too late, in the continuing struggle to be stewards of God's Creation. Let's engage in global partnerships, serving Christ in others and bearing witness to genuine Anglican communion. I see you already engaged in the world. I see it when multiple congregations on Cape Cod join to conduct a camp for children of incarcerated parents. I see you engaged in the world when a deacon and her church in Haverhill create a safe place for women victimized by sex trafficking and domestic violence. I see you engaging the world when our B-PEACE for Jorge team advocates, on our behalf, for sensible legislation and safety measures to reduce the scourge of gun violence. I see you engaging the world when, just this week, some dozen of our members respond to an urgent call from the Episcopal Church in North Dakota to join them in a witness at Standing Rock Reservation. They're back with us today. We look forward to hearing from them a little later and a greeting from the bishop of North Dakota to us. I see you engaging the world in every corner of the diocese when I see you in afterschool and literacy programs that are lifting up "all our children" and their families. In all these ways and so many more.

In today's familiar Gospel reading, Jesus says: *You are the salt of the earth ... you are the light of the world!*"

Dear friends, let's engage that world, with the light of Christ!

Enough of paranoia

Now, because I began this address with an analogy drawn from baseball, I need to return to the matter of winning and losing, with a corrective. This relates to how we will move forward with our mission strategies. It relates also to our current experience of national discourse.

Last year our colleague Rick Stecker edited a previously unpublished work by the late John Snow, professor of pastoral theology at EDS and mentor to many of us in the 1970s and 80s. The book is entitled *I Win, We Lose: The New Social Darwinism and the Death of Love*.

(i) John Snow presents a searing critique of the way that our American culture has

unconsciously accepted the social theory of “survival of the fittest.” And how this, in turn, has caused us to see the world around us in terms of Winners and Losers.

Perhaps I fell into this trap myself with my opening baseball analogy. For John Snow describes “*the emergence of professional sports as the central metaphor for reality in American life.... Winning and losing, success and failure, victory and defeat became the only trusted categories of existence, and the primary motivation for work was not help with the maintenance of a human society but to succeed, to be a winner.*” [pp. 117-118]

Snow goes on to say that viewing ourselves and others as winners or losers results in a steady undercurrent of fear. He writes:

Metanoia is the Greek word that refers to a change in mind, a different way of thinking. Metanoia is the opposite of paranoia. We cannot seem to learn the basic lesson of the New Testament and of history that fear is the cause of paranoid behavior. At its heart, it is the assumption that each person is a potential adversary of every other person. ... The more I imagine this anger in another, the more my behavior becomes defensive and hostile towards others, and the more that that happens, the more frightened and angry others become toward me. Paranoid feelings are apt to cause runaway escalation. ... Only love can cast out fear and allow us the luxury of metanoia. [p. 101]

Snow’s description, penned 35 years ago, has a deep resonance with our current global and national experience. Fear is all about us. And if, as Scripture says, love casts out fear, I observe it to be true also that fear casts out love.

The metanoia, the change of mind to which Snow invites us, is a release from the winner-loser mentality, and thereby a release from the related tyranny of fear. I would submit that in an election season to be released from the winner-loser mentality does not mean we become indifferent as to the outcome, but rather that the object of our concern is not personal or tribal winning or losing, but rather the well-being of humanity itself. The dangers in our world are real. There's no mistake about that. But we must not allow them to divide us. We have had enough of paranoia. Let's give the world some metanoia!

Christians, from the beginning, have concerned themselves with a vision of the church and the world which withstood controversies from within and persecution from without. Again, from John Snow:

Certain primary values of the community held firm through it all. It was simply and thoroughly understood that, until the last day, people were not left to starve while others ate from their surplus. The aged, sick, and infirm were not to be left unattended. Children were to be cared for. Force was not to be an ordering principle of corporate life. The basic resources of the earth were to be shared, not accumulated or squandered....

Christianity was not a religion for winners. It was not concerned with success when it was most truly what it had been created to be. It was in the world to love, ... a human family concerned with each other's welfare, sharing those life-giving resources which God and the Earth provides

them, seeking no victories that require the pain and humiliation of others. ... [Christians] seek only that gentle victory over terror or despair that they have always sought. They claim salvation in the reconciliation of the alienated, hurting and fallen humankind with the God who loves them, through the death and resurrection of Jesus Christ. [pp. 124-125]

To seek that gentle victory over fear and despair that Christians have always sought. To claim salvation in sharing the reconciling ministry of Jesus Christ. Now there's a vision statement: a vision for our national decisions; a vision for our diocesan mission strategies in the next decade; a vision for our calling as Christians unto the Day of the Lord.

Finally, a personal word: A few weeks ago marked the second anniversary of our consecration celebration here in the diocese. I was on the phone with my mother. She said, "Honey, I was looking at the lovely pictures from your incarceration."
"No, Mom," I said, "No, no. It was a consecration."
"Oh," she said, "I knew that didn't sound quite right."

I am not, in fact, incarcerated here with you! However, I am, by the grace of God, yoked in Christ's ministry with you. And for that I am deeply grateful. And once more I thank you, dear friends--for the sacredness of your trust, for the depth of your prayers and for the very great joy of your companionship.

(i) John Hall Snow, *I Win, We Lose: The New Social Darwinism and the Death of Love*, ed. By Frederick Stecker (Eugene, OR: Wipf & Stock, 2016).

**Minutes of the 231st Annual Convention
of the Episcopal Diocese of Massachusetts
November 4-5, 2016
Holiday Inn, Mansfield, MA**

Friday, November 4, 2016

Call to Order

The Rt. Rev. Alan M. Gates called the convention to order. He then led an opening prayer.

Declaration of Constitutional Quorum

The chair recognized Mr. Leon A. Brathwaite II, Secretary, and he declared a constitutional quorum present for the 231st Diocesan Convention.

Invitation to Honorary Seats

The chair recognized Ms. Betsy Ridge Madsen of the Committee on Dispatch of Business. Ms. Madsen then moved the following:

That the following are invited to honorary seats without vote in the Convention: clergy from other dioceses who are licensed to officiate; members of religious orders, postulants and candidates for holy orders and other seminarians who are working in parishes of the diocese; lay deputies to Provincial Synod; and ecumenical representatives.”

The motion carried by majority voice vote.

Invitation to Special Seats

Ms. Madsen moved:

That the following shall be entitled to seat and voice, without vote, in the convention: officers of the corporation; lay members of the Standing Committee; lay co-conveners of deaneries; and lay deputies to General Convention.

The motion carried by majority voice vote.

Permission to Speak

Ms. Madsen moved:

That permission be given for the following to have seat and voice to address the convention:

- *Mr. George Chu, Mr. James Houghton, Ms. Lucinda McClain, Ms. Victoria Perez-Gonzales, Mr. Clark Warner, Mr. John Woodard, Dr. Ellen Childs and Ms. Kristin Lambert Hendler to speak during the Mission Strategy programs;*
- *Anthony Barsamian, Esq. and the Rev. Daryl Lobban to speak during the Massachusetts Council of Churches greeting;*
- *Mr. Jeff Tyrakowski to give the Compensation and Benefits Committee report; and*
- *Ms. Tinka Perry to speak during the Resolutions Committee Report.*

The motion carried by majority voice vote.

Report of the Committee on Dispatch of Business and Acceptance of the Special Rules of Order

Ms. Madsen then moved for approval the Special Rules of Order as found on page H-5 of the Handbook:

Presenters of resolutions will be limited to three minutes per resolution. During debate of resolutions, constitutional and canonical amendments, and other motions moved for consideration, any person seated and with voice will be allowed to speak for two minutes per motion. Five minutes will be allotted per any amendment to main motions: two-and-one-half minutes for the amendment and two-and-one-half against.

Mr. Michael Pierce, Trinity Church, Canton spoke against the special rules of order.

The motion then carried by majority voice vote.

Ms. Madsen then moved the Order of Business on pages H-3 and H-4 of the Handbook.

The motion carried by majority voice vote, and the chair declared as accepted the report of the Committee on Dispatch of Business.

Reports from the Diocesan Council, Standing Committee and Commission on Ministry

The chair recognized Mr. Leon Brathwaite, who moved by title the acceptance of these three reports, to be contained in the Journal of Convention. The motion carried by majority voice vote.

Report of the Qualifications Committee

The chair recognized the Rev. Paula Toland of the Qualifications Committee, who reported that there were no contested delegate seats. Bishop Gates declared the report accepted.

Announcements

The chair recognized the Rev. Canon Bill Parnell who made logistical announcements.

Honors and Thanks

The chair then offered thanks to the following people: to Mr. Leon Brathwaite, Secretary of the Diocese, and Ms. Lisa Garcia, Treasurer of the Diocese; the Hon. Judith Dilday and the Rev. Amy McCreath, outgoing members of the Standing Committee, for their years of service and wise counsel to the Bishops; to the Rev. Beth Wheatley-Dyson, outgoing dean of the South Shore Deanery and for the newly appointed dean of the South Shore, the Rev. Colette Wood to the Rev. Ennis Duffis, outgoing dean of the Merrimack Valley Deanery, and for the newly appointed dean of the Merrimack Valley, the Rev. Martha Hubbard; to the Rev. Jane Gould, outgoing dean of the North Shore Deanery, and for the newly appointed dean of the North Shore, the Rev. Clyde Elledge; to the staff, clergy and volunteer leadership in the diocese who have contributed to the development and implementation of this Convention, particularly to the Very Rev. Jep Streit, Dean of the Cathedral, who is retiring; and to the leadership and members of Episcopal Church Women who have recently voted to dissolve.

The chair then recognized the Rev. Lori Mills-Curran, who presented the Recognition of Diaconal Ministry to the Rev. Holly Hartman. Bishop Gayle Harris then presented a gift to Rev. Hartman.

Mission Strategy Program

The chair recognized Mr. James Houghton, Mr. Billy Boyce and the Rev. Debbie Phillips of the Mission Strategy Phase III Team to lead the program.

Report of the Compensation and Benefits Committee

The chair recognized Mr. Jeff Tyrakowski, Chair of the Compensation and Benefits Committee, who gave the report. The chair then recognized the Rev. Gretchen Grimshaw who moved the Compensation and Benefits Committee’s resolution regarding the clergy compensation standard and formula for 2017, as found on pages H-20-H-23 of the Handbook, as follows, and the motion was seconded:

Resolved, that the diocesan Total Clergy Compensation (TCC) be defined as the total of cash stipend, utilities allowance, housing, SECA (Self Employment Contribution Act) allowance, if any, and all other cash compensation paid to an individual clergyperson. TCC does not include benefits (e.g. pension, health or dental insurance, etc.) or reimbursements for job-related expenses as described in the 2017 Guidelines.

Resolved, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2017, is determined by the following formula:

$$TCC\ Standard = \$68,966 + (141.77 \times Points) + \$500 \times [years\ of\ service^*\ within\ congregation]$$

Provided that the minimum TCC Standard for full-time parochial clergy is \$73,219.

Points are determined as the sum of three factors, calculated from data taken from the most recent Parochial Report:

<i>Total Current Operating Revenues (000s)</i>	<i>x .30</i>
<i>+ Number of Current Adult Pledging Units</i>	<i>x .40</i>
<i>+ Average Current Sunday-Attendance</i>	<i>x .30</i>
<i>= Total Points</i>	

The TCC applicable to a full-time rector, vicar, priest-in-charge or interim shall not be less than 100% of the TCC Standard for the congregation.

The TCC applicable to a full-time curate shall not be less than:

$$TCC\ Standard\ (curate) = [\$68,966 + (141.77 \times Points)] \times 0.60$$

The TCC applicable to a full-time assistant rector shall not be less than:

$$TCC\ Standard\ (assistant) = [\$68,966 + (141.77 \times Points)] \times 0.65 + \$350 \times [years\ of\ service\ within\ the\ congregation]$$

The TCC applicable to a full-time associate rector shall not be less than:

$$TCC\ Standard\ (associate) = [\$68,966 + (141.77 \times Points)] \times 0.75 + \$375 \times [years\ of\ service\ within\ the\ congregation]$$

**Provided that in each case no more than 10 years of service will be considered in this calculation.*

Rev. Geoffrey Piper, St. Gabriel's Church, Marion, asked a question about non-numerical "drivers" being a part of the total compensation and whether that was an allowable addition when considering clergy compensation. Mr. Tyrakowski answered that it was.

The Rev. Mr. Piper then asked a question about asking clergy to pay a percentage of their health insurance premiums. Mr. Tyrakowski answered that our diocesan standard is that parishes pay clergy health insurance premiums in full and cannot currently ask clergy to pay a percentage.

After discussion, the motions were voted.

Announcement of Commission on Ministry Appointments

The chair thanked the Convention as well as the Standing Committee and Commission on Ministry for the support they give to those in discernment and formation for ministry. He thanked the following people for their dedication to the Commission on Ministry: Ms. Ella Auchincloss and Ms. Karon Gibson-Mueller, who have completed terms of service as Co-Chairs on the Commission; the Rev. Miriam Gelfer and Ms. Kay Ridgard, Co-Chairs; the Rev. Dr. Libby Gibson, Chaplain for Academic Formation; and the Rev. Dr. David Killian, Chaplain to Postulants and Candidates.

As of July 1, 2016 there were 36 people in the ordination process as postulants, candidates and transitional deacons – 26 for the priesthood and ten for the diaconate. They come from 28 sponsoring congregations throughout 11 deaneries in the diocese. From December 2015 through July 2016 11 transitional deacons were ordained priests. In June 2016, five candidates were ordained to the diaconate and five candidates were ordained transitional deacons.

Bishop Gates moved the following appointments:

Through Convention 2018: the Rev. Edgar Gutierrez-Duarte, Mr. Matthew Hutchings, Ms. Kay Ridgard, the Rev. Dr. James Weiss, the Ven. Patricia Zifcak.

The motion was seconded and voted.

Report of the Committee on Elections

The chair recognized the Rev. Harry Walton, Chair of the Committee on Elections. He announced the names of those running in uncontested elections that stood to be recognized: Mr. Andrew Foss, Board of Directors of the Barbara C. Harris Center; the Rev. Matthew Cadwell, clerical member of the Standing Committee; Wayne Kennard, Esq. and Ms. Constance Perry, lay members of the Standing Committee; the Rev. Christopher Wendell, the Rev. Nancy Gosslin and the Rev. Dr. Karen Coleman, clerical members of the Disciplinary Board; Mr. Brian Litzenberger, lay member of the Disciplinary Board; the Rev. Patrick Ward, clerical member of the Cathedral Chapter; Ms. Jennifer Hopcroft, lay member of the Cathedral Chapter; Ms. Elizabeth Westvold, Trustees of Donations; Ms. Lisa Garcia, Treasurer; and Mr. Leon Brathwaite, Secretary.

The Rev. Mr. Walton asked Mr. Brathwaite to cast a ballot for their election, and Mr. Brathwaite declared the ballot cast.

The Rev. Mr. Walton announced the nominees in contested elections and formally placed their names in nomination as follows:

Nominees for Clerical Deputies to the 2018 General Convention (four to be elected): the Rev. Mally Ewing Lloyd, the Rev. Thomas J. Brown, the Rev. Edwin Daniel Johnson, the Rev. Karen B. Montagno, the Rev. Tim Schenck, the Rev. Dr. Karen Coleman, and the Rev. Jane Soyster Gould.

Nominees for Lay Deputies to the 2018 General Convention (four to be elected): Dr. Fredrica Harris Thompsett, the Hon. Byron Rushing, Mr. William C. Boyce, Ms. Betsy Ridge Madsen, Angela McConney Scheepers, Esq., Ms. Sarah Neumann, Mr. Samuel J. Gould, and Ms. Julie Shea.

The Rev. Mr. Walton explained the voting procedure according to the proportional representation method. Bishop Gates called for the balloting to begin. The tellers collected the ballots and then removed them for counting.

Ms. Helen Pickard, Christ Church, Andover, proposed an amendment to the Order of Business to extend the time for collecting ballots to allow those who were not present on Friday to participate in the vote. The amendment to the agenda carried by majority voice vote and balloting continued through 8:30am on Saturday.

Announcements

The chair recognized the Rev. Canon Bill Parnell to give logistical announcements.

Recess of Legislative Session for Resolution and Proposed Constitutional Amendments

Presentations and Discussion

The chair recessed the Convention and called upon the Rev. Edwin Johnson to preside during the discussion time on resolutions and proposed constitutional amendments before the Convention.

Evening Prayer

Evening prayer was led by the Diocesan Liturgy Committee.

Diocesan Dinner

An optional buffet dinner was held in the ballroom.

Saturday, November 5, 2016

Holy Eucharist with the Bishop's Annual Address

The Rt. Rev. Gayle Harris celebrated and the Rt. Rev. Alan Gates offered a Convention address. *[The full text of the address is included in the Journal of Convention 2016.]* An offering was collected for Haiti through Episcopal Relief and Development.

Call to Order and Resumption of Legislative Session

The chair called the Convention to order to resume the legislative session at 10:15am.

Announcements and Video

The chair called on the Rev. Canon Bill Parnell to give logistical announcements. The Rev. Canon Parnell then introduced a "Come and See" video produced by the Diocesan Communications Staff.

Greetings and Good Wishes

The chair expressed greetings and good wishes to the Most Rev. Michael Bruce Curry, Presiding Bishop, and his wife, Mrs. Sharon Curry, and to the Rev. Gay Clark Jennings, President of the General Convention House of Deputies, and her husband, the Rev. Albert Jennings. She then recognized the

retired Bishops Suffragan, the Rt. Rev. Barbara C. Harris and the Rt. Rev. Bud Cederholm. The chair extended greetings and good wishes to Bishop Cederholm's wife, Mrs. Ruth Ann Cederholm, and to the wives of former bishops, Mrs. Ginny Birney and Mrs. Jodie Johnson.

The chair then recognized the Rev. David Milam, Dean, to offer a welcome from the Taunton River Deanery.

The chair then called on Anthony Barsamian, Esq. and the Rev. Daryl Lobban, who expressed greetings from the Massachusetts Council of Churches.

Mission Strategy Presentation and Discussion

The chair recognized the Rev. Meghan Sweeney and Mr. Win Treese, co-chairs of the Phase III Mission Strategy Team, to give the presentation and lead the discussion.

Announcements, Noonday Prayer and Lunch

The chair recognized the Rev. Canon Bill Parnell, who gave the announcements about lunch. The chair then announced that \$4,745.45 was given at the offertory for Episcopal Relief and Development, especially for hurricane relief in Haiti. Noonday prayer was led by the Diocesan Liturgy Committee.

Recall to Order

Following lunch, the Convention was recalled to order.

Report of the Qualifications Committee

The chair recognized the Rev. Paula Toland of the Qualifications Committee, who reported that there were no contested delegate seats. Bishop Gates declared the report accepted.

Election Results*

The chair was presented the election results by the Secretary, Leon Brathwaite, and announced them as follows:

Clerical Deputies to the 2018 General Convention:

Rev. Mally Lloyd, Rev. Thomas Brown, Rev. Edwin Johnson, Karen Montagno

Lay Deputies to the 2018 General Convention:

Ms. Fredrica Harris Thompsett, The Hon. Byron Rushing, Mr. William Boyce, Ms. Betsy Ridge Madsen

**following the close of Convention, it was discovered that there was a glitch in the election tallying software. The ballots were re-counted and the results as follows:*

Clerical Deputies to the 2018 General Convention:

- 1. The Rev. Mally Ewing Lloyd*
- 2. The Rev. Edwin Daniel Johnson*
- 3. The Rev. Thomas J. Brown*
- 4. The Rev. Karen B. Montagno*

Lay Deputies to the 2018 General Convention:

- 1. The Hon. Byron Rushing*
- 2. Dr. Frederica Harris Thompsett*
- 3. Mr. William C. Boyce*
- 4. Mr. Samuel J. Gould*

Procedural Announcements

The chair recognized The Hon. Byron Rushing, Parliamentarian, who explained procedures related to the Special Rules of Order, especially around making and speaking to resolutions and proposed constitutional amendments.

Approval of the 2017 Diocesan Budget

The chair recognized the Rev. Stephen Voysey, Chair of the Budget Committee, and Ms. Lisa Garcia, Treasurer, to present the proposed 2017 Diocesan Budget. Rev. Voysey thanked all those involved in the preparation of the 2017 proposed budget, especially the members of the Budget Committee and diocesan staff who helped with the budget process. He then moved the following:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2017 Diocesan Revenues, Core and Supplemental, described in the Proposed 2017 Diocesan Budget and summarized on pages 6 and 7, including the schedule of individual parish and mission assessments for 2017 listed on pages 9 through 14, with the adjustments approved by the Assessment Coordinating Committee and the Diocesan Council on page 15.

Ms. Helen Pickard, Christ Church, Andover, asked a question about doing a study of parishes that have decreased staffing in order to pay their assessment.

The Rev. Adam Linton and Mr. Steve Koehler, Church of the Holy Spirit, Orleans; The Rev. Libby Gibson, St. Mary's Church, Barnstable; The Rev. Judith Davis, Christ Church, Harwich Port spoke against the motion.

The Rev. Jane Bearden, Trinity Church, Haverhill; The Rev. Deborah Warner, Church of the Messiah, Woods Hole; Mr. Michael Pierce, Trinity Church, Canton; Mr. Richard Long, St. John's, Winthrop spoke in favor of the motion.

Ms. Betty Furness, St. Peter's Church, Dartmouth asked a question about how assessments are calculated.

Mr. Billy Boyce, Diocesan Council Member, suggested that the diocese look at the draw on their endowment as compared to the draws that parishes are taking.

Mr. Jim Bast, St. Christopher's Church, Chatham, asked a process question about why the revenue and expenses are voted separately.

Mr. Manny Bravo, Grace Church, Norwood, asked a question about assessment adjustments.

After discussion, the motion was voted.

Rev. Voysey then moved the following:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2017 Diocesan Expenses, Core and Supplemental, described in the Proposed 2017 Diocesan Budget and summarized on pages 6 and 7.

Ms. Helen Pickard, Christ Church, Andover, asked a question about reallocation of monies by Diocesan Council.

Dr. Elizabeth Rawlins, Trinity Chapel, Oak Bluffs asked a question about what happens if/when all the money expected to come in as revenue does not materialize.

After discussion, the motion was voted.

Approval of the Diocesan Mission Strategy

The chair recognized Mr. Win Treese and the Rev. Meghan Sweeney, co-chairs of the Mission Strategy Phase III team who moved the following:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts, pursuant to Canon 10, approve the Diocesan Mission Strategy as proposed on pages H-6 to H-14 of the Convention Handbook.

The Chair asked if there was any discussion.

The Rev. Regina Walton, Grace Church, Newton, moved to amend the proposed Mission Strategy as follows:

An addition to Goal 2, “Share the Word of God and our won faith stories with greater confidence.”

Add “c) Reimagining our ministry with children, youth, and families, so that our young members receive the foundation they need to claim their faith into adulthood in an increasingly secular culture.”

Mr. Billy Boyce, Diocesan Council Member; Rev. Joyce Scherer-Hoock, St. Andrew’s Church, Ayer, The Rev. Cheryl Minor, All Saints’ Church, Belmont spoke in favor of the amendment.

After discussion, the amendment carried.

The Mission Strategy, as amended, was approved by majority vote.

Report of the Committee on Constitution and Canons

The chair recognized the Rev. Chris Wendell, chair of the committee, who gave the report, moved and spoke to the following proposed amendments:

1. Amendment to Diocesan Constitution Article 2, Section 2 to allow all members of the Diocesan Council, as specified in Article 7 sec. 1, a seat and vote at Convention

As approved at Diocesan Convention 2015:

Amend Article 2, Section 2 as follows. Words to be added are underlined and words to be removed on stricken through.

- (a) The Bishops shall each have a seat and vote in the Convention. Subject to Section 4 of this Article, every cleric who is canonically resident in the Diocese, ~~and lay members of the Diocesan Council shall be entitled to a seat and vote in Convention.~~ all members of the Diocesan Council specified in Article 7, Section 1, (excepting clergy who are not canonically resident in this diocese) and members of the Diocesan Youth Council who are at least 16 years of age, shall be entitled to a seat and vote in the Convention.

~~(b) Officers of the Corporation, other Members of the Diocesan Council, Diocesan Youth Council and members of the Standing Committee, and Presiding Officers of Diocesan Commissions and Committees and members of Diocesan Youth Council under the age of 16, who are not otherwise entitled to a seat and vote shall be entitled to all privileges of membership in the Convention, except the right to vote. ; provided that members of the Diocesan Youth Council of age 16 or older shall have the right to vote.~~

The chair asked if there was any discussion.

The chair will remind the Convention that this is the second reading of the proposed amendment, and if they adopt the amended constitution by majority vote of each order, voting separately, it shall become effective upon adjournment of this Convention.

The amendment was voted by majority vote in each order.

2. Amendments to the Diocesan Constitution to Clarify the Current Role and Structure of the Diocesan Youth Council

Amend Article 8 as follows. Words to be added are underlined and words to be removed are stricken through.

There shall be a Diocesan Youth Council ~~composed of twenty members who~~ whose members are in high school grades ~~9-10~~ through 12, and are baptized communicants of the Episcopal Church in the Diocese. Membership on the Diocesan Youth Council is by application through the Office of Youth Ministry. Up to twenty members of the Diocesan Youth Council will be given vote at Diocesan Convention with ~~The Diocesan Youth Council shall be composed of one~~ voting member elected from each Deanery, as determined by the Deanery's bylaws, and eight appointed by the Bishop. Each voting member shall be elected or appointed for a one-year term, which can be renewed by deanery vote or bishop appointment if the member continues to meet all eligibility requirements.

Amend Article 2 Section 2 as follows. Words to be added are underlined and words to be removed are stricken through.

(a) The Bishops shall each have a seat and vote in the Convention. Subject to Section 4 of this Article, every cleric who is canonically resident in the Diocese, all members of the Diocesan Council specified in Article 7, Section 1, (excepting clergy who are not canonically resident in this diocese) and voting members of the Diocesan Youth Council as outlined in Article 8 ~~who are at least 16 years of age,~~ shall be entitled to a seat and vote in the Convention.

(b) Officers of the Corporation, members of the Standing Committee, Presiding Officers of Diocesan Commissions and Committees and non-voting members of Diocesan Youth Council ~~under the age of 16,~~ who are not otherwise entitled to a seat and vote shall be entitled to all privileges of membership in the Convention, except the right to vote.

Amend Article 7 Section 1(e) as follows. Words to be added are underlined and words to be removed are stricken through.

Two youth members, ~~who shall be between the ages of 16 and 18 inclusive at the time of their~~

~~appointment~~, to be appointed by the Bishop of the Diocese from among members of the Diocesan Youth Council, for a term of one year which can be renewed by bishop appointment if the member continues to meet the eligibility requirements.

The chair asked if there was any discussion.

Mr. Michael Pierce, Trinity Church, Canton; The Rev. Silvestre Romero, St. Peter's/San Pedro, Salem spoke against these amendments.

The Rev. Martha Hubbard, St. Paul's Church, Newburyport; Miss Sophie Gibson, Diocesan Youth Council; The Rev. Paula Toland, Church of Our Saviour, Swansea spoke in favor of these amendments.

The chair reminded the Convention that Constitutional amendments require two readings and if approved today, these amendments will need to be approved again at next year's Convention before going into effect.

The amendments were voted by majority vote in each order.

Report of the Committee on Resolutions

The chair then recognized the Rev. Holly Antolini, Chair of the Resolutions Committee, who gave the Committee on Resolutions report.

1. The chair recognized Mr. Kevin Miller who moved the following resolution, "Calling for Civility in Political Conversation" found on page H-29 of the Handbook, and it was seconded:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to refrain from all political and campaign activities that degrade the opposing candidates, parties or individuals with differing opinion; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts condemns the actions of politicians and political candidates that cause vitriolic division between communities; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to uphold those whom they disagree with politically as children of God and brothers and sisters in Christ; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all who are running for office in this and future campaigns, or who hold public office, to stick to the issues, and refrain from personal attack; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts invites neighboring dioceses to enact similar resolutions calling for civility in political campaigns.

Mr. Miller spoke to the resolution.

The chair asked if there was any discussion.

Ms. Lauren McGillicuddy, St. Paul's Church, Malden, moved the following amendment:

1. Insert the words "of the Diocese" between the word "members" and the word "to" on line two of paragraph one.
2. Insert the following before the semi-colon on line three of paragraph one " , provided that this not be construed to limit any person's appropriate exercise of free speech;" to read

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members of the Diocese to refrain from all political and campaign activities that degrade the opposing candidates, parties or individuals with differing opinion, provided that this not be construed to limit any person's appropriate exercise of free speech; and be it further

Ms. Helen Pickard, Christ Church, Andover, moved to amend the amendment to strike out the word "appropriate" as follows:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members of the Diocese to refrain from all political and campaign activities that degrade the opposing candidates, parties or individuals with differing opinion, provided that this not be construed to limit any person's ~~appropriate~~ exercise of free speech; and be it further

Ms. Virginia Rogers, St. Paul's Church, Newburyport spoke against the amendment to the amendment.

The amendment to the amendment carried.

The amended amendment was then moved as follows:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members of the Diocese to refrain from all political and campaign activities that degrade the opposing candidates, parties or individuals with differing opinion, provided that this not be construed to limit any person's exercise of free speech; and be it further

The amendment carried.

The amended resolution was then moved as follows:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members of the Diocese to refrain from all political and campaign activities that degrade the opposing candidates, parties or individuals with differing opinion, provided that this not be construed to limit any person's exercise of free speech; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts condemns the actions of politicians and political candidates that cause vitriolic division between communities; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to uphold those whom they disagree with politically as children of God and brothers and sisters in Christ; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all who are running for office in this and future campaigns, or who hold public office, to stick to the issues, and refrain from personal attack; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts invites neighboring dioceses to enact similar resolutions calling for civility in political campaigns.

Those who spoke against the resolution included: Mr. Michael Pierce, Trinity Church, Canton.

The motion was carried by majority vote.

2. The chair then recognized the Rev. Rebecca Black who moved the resolution “Calling for Reconciliation Following the Divisive Rhetoric of the Recent Presidential Election” found on page H-30 of the Handbook, and it was seconded:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to seek reconciliation and healing of the deep divides in our country caused by the rhetoric of the most recent presidential election; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts urges its parishes to engage in studies about conflict using a program such as Good News: A Scriptural Path to Reconciliation by the Rt. Rev. Steven Charleston, as recommended for use by Bishop Gates in his 2014 convention address; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts invites neighboring dioceses to enact similar resolutions calling for healing and reconciliation following the divisiveness of the rhetoric from this previous election.

Rev. Rebecca Black spoke to the resolution.

Mr. Jerome Fung, Christ Church, Waltham, moved to amend the first resolve as follows:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members of our Diocese to seek reconciliation and healing of the deep divides in our country caused by the rhetoric of the most recent presidential election; and be it further

The amendment carried.

The motion, as amended, was then moved as follows:

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members of our Diocese to seek reconciliation and healing of the deep divides in our country caused by the rhetoric of the most recent presidential election; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts urges its parishes to engage in studies about conflict using a program such as Good News: A Scriptural Path to Reconciliation by the Rt. Rev. Steven Charleston, as recommended for use by Bishop Gates in his 2014 convention address; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts invites neighboring dioceses to enact similar resolutions calling for healing and reconciliation following the divisiveness of the rhetoric from this previous election.

The chair asked if there was any discussion.

Those who spoke in favor of the resolution included: Ms. Charlotte Parsons, St. Mark's Church, Westford.

The motion, as amended, was carried by majority vote.

3. Bishop Gates then recognized the Rev. Amy McCreath, who moved the resolution "Continued Peace Building in the Diocese of Massachusetts" found on page H-31 of the Handbook, and it was seconded:

Resolved, that the Diocesan Convention accept the call from the House of Bishops to pray and work for the end of gun violence through support for the Jorge Fuentes Antiviolence Task Force ("the Task Force"), and urge all congregations and members to engage in the specific actions prioritized by the Task Force in its B-PEACE for Jorge Campaign as follows:

1. *Work and organize for fair, common-sense gun law reform that will keep our communities safe and prevent future tragedies;*
2. *Support positive programs for youth, create employment opportunities and work with under-resourced schools;*
3. *Bear witness through vigils, participation in public forums, peace walks or other public actions to the urgent need to end senseless gun violence;*
4. *Establish ongoing conversations and programs in communities to increase understanding about the impact and the root causes of gun violence, including the role of law enforcement; and be it further*

Resolved, that the Jorge Fuentes Antiviolence Task Force continue to fulfill its charge to bring God's peace to all people by furthering the understanding of gun violence and continuing to take action to end it, including offering resources that support congregations in their efforts and report these efforts to the 232nd Convention of the Diocese in 2017; and be it further

Resolved, that the Jorge Fuentes Antiviolence Task Force report back to the 232nd Convention of the Diocese of Massachusetts its progress and findings to strengthen efforts to alleviate the root causes of gun violence.

The Rev. McCreath spoke to the resolution.

The chair asked if there was any discussion.

Those who spoke in favor of the resolution included: The Rev. Noah van Niel, St. John's Church, Hingham; The Rev. Jane Gould, St. Stephen's Church, Lynn; The Rt. Rev. Barbara Harris, retired Bishop Suffragan.

Those who spoke against the resolution included: Mr. Michael Pierce, Trinity Church, Canton.

The motion carried by majority voice vote.

4. Bishop Gates then recognized the Rev. Holly Antolini, who moved the resolution "Keeping Housing Affordable: A Baptismal Priority" found on page H-33 of the Handbook, and it was seconded:

Resolved, that the 231st Convention of the Episcopal Diocese of Massachusetts encourage congregations to address the pressing need for affordable housing in their communities, becoming familiar with the Community Preservation Act (CPA), a state program adopted in 161 Massachusetts cities and towns, and its impact in providing new, locally controlled public funds to support affordable housing, parks and recreation, and historic preservation in those communities, and sharing information on CPA in preparation for the November 8 Referendum in Boston.

The Rev. Antolini spoke to the resolution.

The chair asked if there was any discussion.

The Rev. Jane Bearden, Trinity Church, Haverhill, proposed the following amendments to add two additional resolves:

And be it further resolved, that the congregations of the Diocese of Massachusetts are encouraged to engage in advocacy and action to identify potential housing projects and to work to ensure that the Community Preservation Ave funds are distributed in ways that focus on increased affordable housing; and be it further

Resolved, that the 231st Convention of the Episcopal Diocese of Massachusetts, in celebration of our commitment to our newly affirmed Mission Strategy, that congregations engage more deeply with our neighbors and loved communities, and to ensure that our congregations have the resources to embody that mission, we encourage the Mission Strategy Phase IV Implementation committee to include social justice in housing advocacy and action as priorities for this diocese.

The Rev. Steve Ayres spoke against the amendments to the resolution.

A motion was made to split the two resolves to vote on them separately. The motion carried.

The first amendment was moved as follows:

And be it further resolved, that the congregations of the Diocese of Massachusetts are encouraged to engage in advocacy and action to identify potential housing projects and to work to ensure that the Community Preservation Ave funds are distributed in ways that focus on increased affordable housing; and be it further

The amendment carried.

The second amendment was moved as follows:

Resolved, that the 231st Convention of the Episcopal Diocese of Massachusetts, in celebration of our commitment to our newly affirmed Mission Strategy, that congregations engage more deeply with our neighbors and loved communities, and to ensure that our congregations have the resources to embody that mission, we encourage the Mission Strategy Phase IV Implementation committee to include social justice in housing advocacy and action as priorities for this diocese.

The amendment failed.

The resolution was then moved as amended:

Resolved, that the 231st Convention of the Episcopal Diocese of Massachusetts encourage congregations to address the pressing need for affordable housing in their communities, becoming familiar with the Community Preservation Act (CPA), a state program adopted in 161 Massachusetts cities and towns, and its impact in providing new, locally controlled public funds to support affordable housing, parks and recreation, and historic preservation in those communities, and sharing information on CPA in preparation for the November 8 Referendum in Boston; and be it further

Resolved, that the congregations of the Diocese of Massachusetts are encouraged to engage in advocacy and action to identify potential housing projects and to work to ensure that the Community Preservation Ave funds are distributed in ways that focus on increased affordable housing,

The motion carried by majority voice vote.

Resolution/s in Response to the Bishop's Address

The chair recognized the Rev. Holly Antolini, who moved the following:

Whereas we acknowledge the testimony of the Cubs' World Series win to the power of resurrection,

And whereas the temptation is overwhelming to see our world in sports terms as always about winning or losing, not about the well being of humanity itself;

And whereas "metanoia is the opposite of paranoia... Only love can cast out fear and allow us the luxury of [a true change of mind and heart which is] metanoia;"

And whereas we are called by our new Mission Strategy, yoked together with our Bishop, to the metanoia of "embracing brave change" as individuals, as congregations and as a diocese; therefore, be it

Resolved, that we will continue our tradition of mutuality and familial relationship between the Episcopal Church and the people of Standing Rock by joining in solidarity alongside them in continued prayer and action in defense of clean water and the sanctity of their land; and be it further

Resolved, that we the people of the Episcopal Diocese of Massachusetts, heeding our Bishop's call, commit ourselves to countering the steady undercurrent of fear by being in the world as we have always aspired to be... a human family concerned with each other's welfare, sharing those life-giving resources which God and the Earth provides, seeking no victories that require the pain and humiliation of others.

... [but] only that gentle victory over terror or despair that they have always sought. We will claim salvation in the reconciliation of the alienated, hurting and fallen humankind with the God who loves [us], through the death and resurrection of Jesus Christ.”

The motion carried by majority voice vote.

Children’s Program Video

Ms. Amy Cook, Director of Educational Resources and Training introduced a short video created by the children in the kids program today based on the Zacchaeus.

Standing Rock, North Dakota

Bishop Gates read a letter from Bishop Michael Smith of North Dakota about the recent pipeline protesting happening at Standing Rock. Diocesan clergy who traveled to Standing Rock spoke briefly about their experience.

Clergy Introductions

The chair introduced the transitional and vocational deacons and priests newly ordained since Convention 2015, as well as clergy who have become canonically resident or licensed and those who have retired since Convention 2015.

Other Introductions

The chair invited the following groups to come forward and introduce themselves: Life Together Fellows; the Diocesan Youth Council; and Postulants and Candidates for ordination.

Closing and Adjournment

All legislative matters were concluded and Bishop Gates led a closing prayer. He then called for a motion to adjourn at 3:45pm. It was seconded and voted.

*Respectfully submitted by Laura Simons
Assistant Secretary of the Diocese*

Handbook

231st Annual Convention of the Episcopal Diocese of Massachusetts

Holiday Inn, Mansfield



PLEASE BRING THESE MATERIALS TO CONVENTION

CALL TO THE CONVENTION
NOTICE OF THE 231st ANNUAL SESSION OF THE CONVENTION
OF
THE EPISCOPAL DIOCESE OF MASSACHUSETTS

In accordance with Article 3, Section 3 of the Constitution of the Diocese of Massachusetts, I hereby issue the formal call for the two hundred thirty-first annual session of the Convention of the Diocese of Massachusetts, which will begin at one o'clock in the afternoon, at the Holiday Inn in Mansfield, Massachusetts.

LEON A. BRATHWAITE II
Secretary of Convention

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ORDER OF BUSINESS

Friday, November 4, 2016

- 11:00 a.m. REGISTRATION opens in Lobby of Ballroom
- 12:30 p.m. Orientation for New Delegates and Newcomers to Convention
- 1:00 p.m. CALL TO ORDER OF LEGISLATIVE SESSION
Opening Prayer
Declaration of Constitutional Quorum
Invitation to Honorary/Special Seats
Permission to Speak
Report of the Committee on Dispatch of Business
Acceptance of the Special Rules of Order (H-5)
Receiving of Reports by Title: 2016 Journal
Report of the Qualifications Committee
Welcome and Announcements
- 1:30 p.m. Honors and Thanks
Recognition of Diaconal Ministry of Deacon Holly Hartman
- 1:45 p.m. Mission Strategy Program
- 2:45 p.m. Report of the Compensation and Benefits Committee (H-20)
Approval of Commission on Ministry Appointments
Diocesan Elections (H-15)
- 3:30 p.m. RECESS for Discussion of Resolutions and Proposed Amendments
- Resolutions:
1. Calling for Civility in Political Conversation (H-29)
 2. Calling for Reconciliation following the Divisive Rhetoric of the Recent Presidential Election (H-30)
 3. Continued Peace Building in the Diocese of Massachusetts (H-31)
 4. Keeping Housing Affordable: A Baptismal Priority (H-33)
- Amendments to the Constitution and Canons:
1. Second reading of the proposed amendment to Article 2, Section 2 of the Diocesan Constitution (H-25)
 2. Proposed amendments to the Diocesan Constitution to clarify the current role and structure of the Diocesan Youth Council (H-26)
- 4:45 p.m. Evening Prayer
- 5:15 p.m. Social Hour
- 6:30 p.m. Optional Dinner in Ballroom

Saturday, November 5, 2016

- 7:15 a.m. REGISTRATION continues in Lobby of Ballroom
- 8:30 a.m. HOLY EUCHARIST
Preaching: The Rt. Rev. Alan M. Gates
Celebrating: The Rt. Rev. Gayle E. Harris
- 10:00 a.m. LEGISLATIVE SESSION RESUMES
Report of the Committee on Qualifications (if needed)
Announcements
Greetings and Good Wishes
Welcome from the Taunton River Deanery
Welcome from the Massachusetts Council of Churches
- 10:15 a.m. Mission Strategy Presentation and Discussion
- 12:15 p.m. Noonday Prayers and Lunch
- 1:15 p.m. RECALL TO ORDER
Election Results
Vote to Approve Diocesan Assessments for 2017
Vote to Approve Diocesan Budget for 2017
Vote to Approve Diocesan Mission Strategy
- 2:00 p.m. Report of the Committee on Constitution and Canons (H-24)
Report of the Resolutions Committee (H-29)
Resolution(s) in Response to the Bishop's Address
- 3:00 p.m. Introduction of New and Retired Clergy
Other Introductions: Life Together Fellows, Deacons, Diocesan Youth Council, Postulants and Candidates
- 3:30 p.m. Closing and Adjournment

SPECIAL RULES OF ORDER

In order to facilitate discussion and debate on the Convention floor, the Committee on Dispatch of Business will move acceptance of the following Special Rules of Order:

MOVED:

Presenters of resolutions will be limited to three minutes per resolution. During debate of resolutions, constitutional and canonical amendments, and other motions moved for consideration, any person seated and with voice will be allowed to speak for two minutes per motion. Five minutes will be allotted per any amendment to main motions: two-and-one-half minutes for the amendment and two-and-one-half minutes against.

Proposed Mission Strategy for the Episcopal Diocese of Massachusetts

September 19, 2016

Our Vision

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

EMBRACING BRAVE CHANGE

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

Let all that you do be done in love.

(I Corinthians 16:13-14)

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

Reimagining Our Congregations

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

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

Building Our Relationships

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

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

Engaging Our World

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

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

*Glory to God whose power, working in us, can do infinitely more than we can ask or
imagine:*

*Glory to God from generation to generation in the church, and in Christ Jesus for ever
and ever.*

(Ephesians 3:20-21)

An Invitation

This Mission Strategy is an invitation to all of our members and congregations to join in a conversation about our shared goals as Christians and Episcopalians in eastern Massachusetts. Every community is different, and every congregation can adapt these strategies to match their particular gifts and needs. Every one of us has a part to take in living out our goals of transformation, relationship, justice and reconciliation.

The nine goals of this Mission Strategy are intended both to reflect the ideas that the people of our diocese expressed in the listening process and to respond to the movement of the Holy Spirit. It also includes initial action steps, which represent starting places for our work together. The Mission Strategy Drafting Team recognizes that much work remains to create specific plans and clear measures of success. The team hopes that all members of our diocese—lay members, deacons, priests and bishops—will continue to discern our shared mission through prayer, conversation and experimentation in the days and years to come.

As specified in Canon 10, the Mission Strategy is designed to guide the use of our shared resources: the funds in our diocesan budget and the gifts and time of our diocesan staff. Changing an organization as large as our diocese will require wise and creative planning, as well as careful follow-through. To oversee this effort, the bishops and Diocesan Council will name a 17-person Implementation Organizing Team in the fall of 2016.

The Implementation Organizing Team will create further opportunities for input and leadership as this process unfolds. The high level of engagement, honesty and insight that has characterized the Mission Strategy listening and drafting processes gives us confidence that, with God's help, we can become a more transparent, connected, effective and innovative community in Christ.

Goals and Initial Actions

As the Episcopal Diocese of Massachusetts, we will embrace brave change by **reimagining our congregations** to better respond to the movement of the Holy Spirit in our time and place; **building our relationships** to unite as one body in Christ; and **engaging our world** to reconcile ourselves and all people to one another, and all of Creation to God.

PREPARING THE WAY

1. Undertake an open and thorough review of our gifts, resources and programs.

For which of you, intending to build a tower, does not first sit down and estimate the cost, to see whether he has enough to complete it? (Luke 14:28)

In order to be good stewards of the resources God has given us, we must begin by taking stock of our spiritual gifts, our partnerships, our programs and strategic ministries, and our budget, including the structure for parish assessments. Our commitment to this Mission Strategy will require changes in funding and in the responsibilities of diocesan staff that we will carry out both with compassion and appreciation for what has been done in the past and with a clear vision of the future we seek. We will also review the ways our governing bodies invite participation in leadership, make decisions and communicate their work, so that all our members have opportunities to engage in decisions about the future of our diocese. Each team, committee or governing body will work to ensure that its purpose and ways of working align with the goals of our diocese.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Establishing a clear structure and transparent process for regularly evaluating all programs and ministries that receive diocesan funding based on their contribution to the spiritual, relational and practical goals of our diocesan Mission Strategy.
- b) Assessing the ways our current use of resources and governance structures support or impede the goals of our Mission Strategy, and making appropriate changes.

REIMAGINING OUR CONGREGATIONS

2. Share the Word of God and our own faith stories with greater confidence.

No one after lighting a lamp puts it under the bushel basket, but on the lampstand, and it gives light to all in the house. In the same way, let your light shine before others, so that they may see your good works and give glory to your Father in heaven. (Matthew 5:15-16)

Jesus calls us to proclaim the coming reign of God's love. We come together in Christian communities to experience that love more fully, healing our souls and transforming our lives. When we take the risk to tell our own faith stories and listen well to others, we renew our commitment to Christ, we invite people into a deeper relationship with God, and our congregations thrive. We are keenly aware that children, youth and young adults have their own faith stories to share, and we strive to include their voices in this important work.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Inviting all members of our diocese to deepen our relationships with Jesus and strengthen our formation as disciples so that we can live our faith in the world.
- b) Supporting all members of our diocese in cultivating the skills of evangelism, so that we can all learn to share more readily how God is working in our lives.

3. Address the fact of numerical decline boldly and creatively.

For surely I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope. (Jeremiah 29:11)

We envision our diocese engaged in honest conversation about the challenges we face. The health of any one congregation matters to all of us as members together of one body in Christ. Each congregation gathers people with unique spiritual gifts and a distinctive call to live out their baptismal ministry in the church, in their homes and workplaces, and in service to their wider community. Many of our congregations struggle to hold on to the joy of that calling when faced with the challenges of sustaining participation, maintaining aging buildings, funding clergy and staff salaries and supporting programs. We hope to see our congregations, whether they feel healthy or challenged, working openly to discern their roles as Christian communities in a changing world.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Creating a public, transparent, representative body of our diocese to support all congregations through visioning and discernment.
- b) Designating a funding stream to assist congregations to engage brave change through creative models of leadership development, discipleship and Christian community.
- c) Expanding opportunities for lay and clergy leaders to build connections with one another and to develop skills in spiritual formation, pastoral care, sound governance, financial stewardship and building use, with attention to the needs of the nearly half of our congregations that employ part-time clergy.

BUILDING OUR RELATIONSHIPS

4. Initiate new relationships across our diocese.

Do not fear, for I have redeemed you; I have called you by name, you are mine. (Isaiah 43:1b)

God promises that each of us is known by name. The heart of church is the experience of knowing and being known, deepening our relationships with God and one another. As Christians we are called to share this gift, constantly expanding the circle of those we claim as our neighbors and our friends.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Developing opportunities for teams from congregations to visit other congregations, sharing worship and learning about one another.
- b) Creating time and space for building relationships at all diocesan-wide events.

5. Support stronger collaborations among congregations.

Two are better than one, because they have a good reward for their toil. For if they fall, one will lift up the other. (Ecclesiastes 4:9-10)

Our diocese is already enriched by a variety of collaborations: mission hubs; urban/suburban partnerships; gatherings of congregations with similar interests, such as leadership in small churches or engagement in global mission; and other shared ministries. We have seen the power and joy that come from working together, trusting not in our own self-reliance but in the God who calls us to be one body of Christ.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Initiating new partnerships and strengthening existing collaborations with other Episcopal congregations, ecumenical and interfaith partners, and community organizations.
- b) Connecting and equipping networks of lay people, clergy and diocesan staff members who share a passion for particular forms of service and public advocacy (such as feeding the hungry, supporting veterans, caring for elders, ending sex trafficking, eradicating gun violence or responding to addiction and substance abuse).

6. Incorporate regions outside of Boston more fully in the life of our diocese.

*So then you are no longer strangers and aliens, but you are citizens with the saints and also members of the household of God, built upon the foundation of the apostles and prophets, with Christ Jesus himself as the cornerstone.
(Ephesians 2:18-20)*

In order to carry out our mission as a diocese, we must address any inequities of resources or access that can divide us. In particular, we hope to address the disconnection felt by many of our members who live outside Boston and its suburbs, so that we can work in grateful harmony as one diocese.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Creating opportunities for diocesan staff members to be present in congregations and ministries around our diocese and to gather with lay leaders and clergy in order to share and learn best practices, develop closer partnerships and know all of our communities.
- b) Inviting members from all regions of our diocese to engage in leadership roles in all diocesan project teams and governing bodies.
- c) Ensuring that meetings and training opportunities are accessible to members from all regions of our diocese.

7. Fulfill the Gospel command to love one another, particularly across difference.

Let all of us speak the truth to our neighbors, for we are members of one another. (Ephesians 4:25)

Christ calls us to heal a hurting world. We begin this work by reaching across the lines that divide us, welcoming the stranger and allowing ourselves to be welcomed by those we do not know. In these honest and loving encounters, we create greater justice and freedom for all. We are committed to responding as a diocese to the oppression that tears at the fabric of our nation and our world. We hope to honor the experiences of all those whose gifts have not been fully acknowledged and appreciated in the church and in the world, such as women; lesbian, bisexual, gay, and transgender people; people of color; and people with disabilities. We need a deeper and more inclusive conversation about racism and other forms of oppression, and we need to move beyond conversation to visible action to help create the beloved community of Christ.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Working to respond to Jesus' call to fully include all persons in the life of the church.
- b) Entering into a large-scale, authentic and committed conversation about racism and other forms of oppression with the support of effective facilitators and training programs, in order to move us further into the essential work of racial justice and reconciliation.
- c) Investing in ministries with communities of color and immigrant communities, drawing upon their unique strengths and supporting their health.

ENGAGING OUR WORLD

8. Deepen our relationships with our neighbors in order to work side-by-side for a more just and peaceful world.

You shall love the Lord your God with all your heart, and with all your soul, and with all your mind. This is the greatest and first commandment. And a second is like it: You shall love your neighbor as yourself. (Matthew 22:37-39)

With a basis in mutual trust, our ministries can transform everyone who takes part in them. We recognize that all people come to God with brokenness and need, and all people are called to use their God-given talents to serve the world. Our mission efforts must always begin with strong relationships that break down divisions. Following the example of our deacons, we will work to bring the world to the church and the church to the world.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Working together to help all of our congregations to engage more deeply with their neighbors and local communities.
- b) Further strengthening our relationships with neighbors around the world through partnerships in global mission.

9. Strengthen our relationship with our Earth and our commitment to caring for Creation.

Ask the animals, and they will teach you; the birds of the air, and they will tell you; ask the plants of the earth, and they will teach you; and the fish of the sea will declare to you. ...In God's hand is the life of every living thing and the breath of every human being. (Job 12:7-8, 10)

God created all things and called humanity to live in harmony with them. We are called to join God in repairing a broken covenant with our Earth, creating a more sustainable life for ourselves, for our future generations and for all life.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Continuing to foster a meaningful long-term conversation about caring for Creation in order to inspire all our members and congregations to be more faithful stewards of our physical world, reduce carbon emissions, respond to the effects of climate change and advocate for sound climate policy.
- b) Designating a funding stream to support congregations that initiate or continue significant efforts in their local contexts to restore Creation and respond to the moral crisis of climate change.

A Prayer for Our Diocese and the Mission Strategy Process

Lord Jesus Christ, we come before you as a people of God,
seeking to join your transforming work in the world.
Open our eyes to see the movement of your Spirit.
Open our minds to imagine new possibilities.
Open our ears to hear the voices of all your children.
Open our mouths to speak with honesty and love.
Open our hands to share all that we have.
Open our hearts to receive all that we need.
Thank you, Lord, for calling us
as your disciples and friends.
Give us courage to follow where you lead. Amen

NOMINEES FOR DIOCESAN ELECTIONS

With Results of Uncontested Elections

Nominees for CLERICAL DEPUTIES to the 2018 GENERAL CONVENTION

(7 nominees, 4 to be elected) *Nominees listed in random order as they will appear on the ballot.*



The Rev. Mally Ewing Lloyd, Christ Church, Plymouth
What an exciting time as the Episcopal Church and our diocese develop vision and mission strategy with new leadership! Deputy to three General Conventions, I serve on Program Budget and Finance and the Executive Council and work on subcommittees to develop the budget vision and process and to create a waiver system for dioceses that can't pay their full assessment. I am eager to share what I have learned from our diocese's processes and vice versa.

The Rev. Thomas J. Brown, Parish of the Epiphany, Winchester
I love General Convention, and would be honored to serve as one of your deputies. I would bring nearly 25 years of experience, seven years as a trustee of the Church Pension Group, and three conventions' worth of leadership with the Episcopal Women's Caucus and Integrity. I am eager to support the continued study for a new prayer book, and to shape future episcopal elections so they reflect the diversity of our church.

The Rev. Edwin Daniel Johnson,

St. Mary's Church, Dorchester

I love Jesus and the people of our diocese. As a deputy I would strive for a church that engages the gifts of my parents and nurtures the faith of my toddler son Francisco by championing evangelism and justice for people and the earth. I draw on my experiences at the 2012 and 2015 conventions, Black and Hispanic ministries, and perspectives as a priest and parishioner as I seek to represent us again in 2018.

The Rev. Karen B. Montagno, Director of Congregational Resources and Training, Diocese of Massachusetts

Congregations and communities of faith have been central to my ministry. Working collaboratively with congregations, seminaries, deaneries, consultants, Province I and General Convention, to develop tools for lay and ordained leadership, Christian and spiritual formation has been key. Justice work, youth and young adults, creation care, retreats and spiritual direction are also ways I have served. The challenges the church faces call for prayerful change, excitement and hope. I look forward to being a part.



The Rev. Tim Schenck, Parish of St. John the Evangelist, Hingham

A digital evangelist, author, blogger and Lent Madness creator who has served in our diocese for seven years, I am passionate about communicating the Gospel in fun, fresh, exciting and creative ways. I cherish our Anglican heritage, while knowing we must respond to a changing culture in desperate need of Jesus Christ. I would be honored to represent our diocese while helping the Episcopal Church more effectively communicate its message of love to the world.

The Rev. Dr. Karen Coleman, St. James's Church, Somerville
I have served as consecration chair for Bishop Alan Gates, the clergy representative for Province I, a member of Diocesan Council and as a member of the Disciplinary Board. I am intrigued by the intersection of faith and polity as enacted by General Convention that impacts ministries throughout the wider Episcopal Church.



The Rev. Jane Soyster Gould,

St. Stephen's Memorial Episcopal Church, Lynn

As a deputy since 2000, I bring experience and passion to the work of General Convention. I was appointed to the State of the Church Committee, one of few interim bodies remaining following restructuring. Last year, I helped craft legislation that resulted in \$2 million being allocated to address racial reconciliation and justice. Current positions: North Shore Dean;

President, Lynn Community Health Center Board; on the PICO and MCAN boards (national and state faith-based relational organizing federations).

Nominees for LAY DEPUTIES to 2018 GENERAL CONVENTION

(8 nominees, 4 to be elected) *Nominees listed in random order as they will appear on the ballot.*

Dr. Fredrica Harris Thompsett,

Professor of Historical Theology, Episcopal Divinity School

I bring experience, expertise and energy as an Episcopal historian and longtime seminary professor to the parish, diocesan (Standing Committee, COM), national (now a member of Executive Council) and international Anglican levels. My passions expressed in my many books are supporting the baptismal ministry of laity and clergy alike, small congregations, antiracism and making sane decisions.

My current book project involves conversations between Bishop Barbara Harris and Presiding Bishop Michael Curry.

The Hon. Byron Rushing,

St. John St. James Church, Roxbury

My primary ministry is politics. I have served in the Massachusetts Legislature since 1983. A General Convention Deputy since 1973, its first lay chaplain in 1994, I was elected vice president of the House in 2012 and re-elected in 2015. I serve on the Council of Advice to the President, Gay Jennings; together with the presiding bishop we serve on the Committee for Racial Reconciliation. I am an advocate for the ministry of all the baptized.



Mr. William C. Boyce, Grace Church, New Bedford

Serving in many positions throughout the church at local, deanery, diocesan and church-wide levels, I have seen the church's strength, when united, bring about change, justice, reconciliation and love to our hurting world. As a deputy to the 2018 General Convention, I mean to continue the work started when I was an alternate deputy in 2015 of reimagining what it means to be church, empowering local congregations and joining the Jesus Movement.

Ms. Betsy Ridge Madsen, Church of the Advent, Boston

As a member of Diocesan Council and co-convener of the Boston Harbor Deanery, I am in a great position to communicate our needs to General Convention and to report back. I have represented the diocese as deputy or alternate seven times. I am a teacher at Epiphany School, Dorchester, where I have taught since its beginning. I care deeply about my Christian commitment to community, social justice, world peace and the environment.



Angela McConney Scheepers, Esq.,

Trinity Church, Marshfield

I look forward to working, learning and connecting with Episcopalians on the national level, and bringing that knowledge and ideas back to our diocese. I have been privileged to serve the diocese as a member and co-chair of the Commission on Ministry and a director of the Barbara C. Harris Camp and Conference Center. I am currently a member of the Standing Committee.

Ms. Sarah Neumann, Church of Our Redeemer, Lexington

I was a deputy to General Convention in 2015 and served on the Legislative Committee for Social Justice and U.S. Policy; in 2012, I was a member of the Official Youth Presence. I hope to be a voice for meaningful change that will enable us to show God's love to all in today's world. I currently serve on the Board of Directors for the Barbara C. Harris Center and am a senior at Williams College.



Mr. Samuel J. Gould, St. Paul's Church, Brookline

Since leaving my role as diocesan director of youth ministry in 2014, I joined St. Paul's and am eager to continue serving the diocese. I attended the past four conventions as a member of the Official Youth Presence and deputy. In 2015 I served on the Program, Budget and Finance Committee working to craft the church-wide budget. As the only member of the committee under 35, I found myself providing a voice for my generation.

Ms. Julie Shea, St. John's Church, Winthrop

I am an educator in an urban district and a parishioner at St. John's in Winthrop, one of the diocese's many small parishes. One of my primary interests is the viability and vitality of all parishes so that we may continue to share the good news of Jesus Christ within our communities and with future generations. I have served as a mentor with the Youth Leadership Academy, on the Discernment Committee and on my parish's vestry.



UNCONTESTED ELECTIONS
The following nominees were unopposed.

Member of the Board of Directors to the Barbara C. Harris Center

Mr. Andrew Foss, Trinity Church, Boston (3-year term)

Clerical Member of the Standing Committee

The Rev. Dr. Matthew P. Cadwell, Emmanuel Church, Wakefield (4-year term)

Lay Members of the Standing Committee

Wayne Kennard, Esq., St. Peter's Church, Weston (4-year term)

Ms. Constance Perry, Trinity Church, Boston (1-year term)

Clerical Members of the Disciplinary Board

The Rev. Christopher Wendell, St. Paul's Church, Bedford (3-year term)

The Rev. Nancy Gossling (3-year term)

The Rev. Dr. Karen Coleman, St. James's Church, Somerville (2-year term)

Lay Member of the Disciplinary Board

Mr. Brian W. Litzenberger, Ph.D., Trinity Church, Concord (3-year term)

Clerical Member of the Cathedral Chapter

The Rev. Patrick C. Ward, Trinity Church, Boston (3-year term)

Lay Member of the Cathedral Chapter

Ms. Jennifer Hopcroft, Cathedral Church of St. Paul, Boston (3-year term)

Trustees of Donations

Ms. Elizabeth Westvold, St. Peter's Church, Weston

Treasurer of the Diocese

Ms. Lisa Garcia, Parish of the Epiphany, Winchester

Secretary of the Diocese

Mr. Leon A. Brathwaite II, St. Andrew's Church, Edgartown

POSITIONS WITHOUT NOMINEES

Member of the Board of Directors to the Barbara C. Harris Center

(1 to be appointed for a 3-year term)

REPORT OF THE COMPENSATION AND BENEFITS COMMITTEE OF THE DIOCESAN COUNCIL

Purpose of Committee

The Clergy Compensation Committee was established by a resolution of the Diocesan Convention of 1980 as a subcommittee of the Commission on Ministry. The present title “Compensation and Benefits Committee” reflects the broader role of the committee as it has evolved since 1980. Oversight of the committee was transferred to the Diocesan Council by a resolution of the Diocesan Convention of 2011.

The role of the committee is to assist the bishop in matters pertaining to the compensation and benefits for clergy and lay employees of the church, which includes establishing guidelines to promote uniform, fair and equitable compensation and benefits for such church employees within the diocese and performing other projects relating to compensation, benefits and personnel matters.

The committee is a resource to lay and ordained congregational leadership as advisors and facilitators in establishing and maintaining compensation and benefits in relation to diocesan guidelines, congregational mission and individual performance objectives. In fulfilling this role, the committee collects and reviews data on compensation and benefits in other Episcopal dioceses and other denominations, as well as in the business, government and academic communities.

Goals for the Committee

The focus of the committee related to compensation and benefits for clergy and lay employees is to:

Attract, retain and support clergy to achieve the mission of the diocese and congregations.

Create an environment that promotes the well-being of clergy through a clear understanding of the relationship between clergy and their congregations and goals that express their mutual ministry.

Allow a reasonable standard of living according to local and/or regional measures.

Recommend that the initial salary in a new clergy placement conforms to the diocesan standard and takes into account differences in range of experience relative to the scope of the position and role.

Promote salary advancement and benefits that reflect personal growth and experience in the role.

Advocate standards for fair and equitable benefits and compensation for lay employees.

Since 2001, the diocese has maintained guidelines for the minimum Total Clergy Compensation (TCC) to be paid to a priest in a parish as recommended annually by the committee and approved by the Diocesan Convention. The minimum TCC is based on various measures of parish size and on an individual priest's years of service in that parish. A parish may (and is encouraged to) provide additional compensation for special skills, abilities and competencies that may be relevant to a its specific needs.

In addition, the committee has promulgated guidelines for benefits for clergy and lay employees, model letters of agreement for clergy, model personnel policies for parishes and standards for priests in campus ministry. Further, it has conducted studies and made recommendations relative to health insurance for church employees, and conducted periodic surveys of compensation, benefits and personnel policies and practices of parishes within the diocese.

Summary of Committee Work in 2016

During this past year, the committee addressed the following matters:

The committee has reviewed the health plan renewal options provided by the Medical Trust for 2017. The rate increase for the coming year is set at 5.5% across all options, after increasing by 6% for 2016. The Medical Trust reports paying out in excess of 90% of premiums received directly in benefits, which is consistent with what it has reported in the past. It has been the policy of the committee to establish a congregation's mandate for payment of premiums on "the lowest cost comprehensive plan" available to us through the Medical Trust in accordance with General Convention Resolution A177. Given the change in our mandated base plan – to the CIGNA Open Access Plus plan (code MGOP) beginning in 2013 – the cumulative increase in the base premium to parishes since 2010 is 24%. We point this out because the majority of our enrollees (about 75%) remain in the Open Access Plus In-Network plan (code MGIN) – down from 80% last year. This plan's premiums are up 55% over that same period of time.

The committee has recommended that the existing plan options be maintained for 2017. As mentioned last year, alternative (and lesser) plan designs were offered by the Medical Trust – including plans at the "Silver" metallic level (as designated by the Affordable Care Act). Like many of our peers in other provinces, we have chosen to defer adopting a major change in our base offerings, in part due to plan design and vendor changes we expect to be implemented by the Medical Trust for 2018. Because the proposed merger between CIGNA Healthcare and Anthem Blue Cross has been delayed, the CIGNA options remain available to us. Since the rate action for 2017 appears reasonable, it seems prudent to stay the course for one more year and allow time for us to prepare for potential changes in 2018. Any new benefit strategies we might recommend should be informed by the ongoing mission strategy process, and the committee looks forward to incorporating those views into future guidelines.

Members of the committee have taken part in events sponsored by the Church Pension Group (CPG) during the year, including the Client Council Conference which was held in February and focused on proposed changes to the pension plan in light of changes in the life and demographics of the church. The committee recommends the 2015 Church Compensation Report published in July and available at www.cpg.org.

This report has extensive information on median clergy salary levels nationally. The committee is increasingly aware of the changing nature of ministry within our church, and the extent to which our guidelines have not sufficiently addressed issues such as part-time clergy, interim clergy and lay salary, health and retirement benefits as mandated by Resolution A138, among others. We welcome recommendations about how we can assist leaders with flexible solutions within the context of compliant health and welfare practices, and regularly advocate those options with CPG.

Throughout the summer, the committee conducted its annual survey of parochial clergy salaries, the results of which will be published in the 2017 Guidelines. As we have reported previously, our approach to Total Clergy Compensation (TCC) is fairly unique and has successfully avoided placing clergy compensation into tiers based strictly upon parish size (as you will notice the above mentioned Compensation Report does). The TCC approach has also succeeded in one of its stated goals of raising the general level of salaries over time since its implementation in 2001, while also taking into account variables such as operating budgets and pledging units. The committee would like to emphasize that the annual adjustment to the TCC Standard (minimum) calculation is not a “Cost of Living Adjustment” (COLA). Rather, it is a method of ensuring the promotion of a reasonable standard of living in the context of a parish’s financial capacity. Whether or not any salary adjustment is actually made in the coming year, we encourage all parishes to use the TCC “Worksheet” and calculate their TCC Standard annually.

Consistent with our charge, recent history and survey data gathered each year, the Compensation and Benefits Committee again recommends a 3% increase in the Total Clergy Compensation Standard for 2017.

Members of the Committee

Ms. Cynthia Cushman
The Rev. Gretchen S. Grimshaw
Ms. Carol Kingston
Paige Manning, Esq.
The Rev. Dr. Jean Baptiste Ntagengwa

The Rev. Andrew J. Stoessel
Mr. Jeff Tyrakowski, Chair
The Rev. Christopher S. Wendell
John V. Woodard, Esq.

Adjustments to the Compensation Formulae

Pursuant to our stated goals and objectives, the committee has made an adjustment to the formula for parochial clergy, and presents the following resolution to be voted upon here:

Resolutions on Clergy Compensation and Benefits

Resolved, that the diocesan Total Clergy Compensation (TCC) be defined as the total of cash stipend, utilities allowance, housing, SECA (Self Employment Contribution Act) allowance, if any, and all other cash compensation paid to an individual clergyperson. TCC does not include benefits (e.g. pension, health or dental insurance, etc.) or reimbursements for job-related expenses as described in the 2017 Guidelines.

Resolved, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2017, is determined by the following formula:

$$\text{TCC Standard} = \$68,966 + (141.77 \times \text{Points}) + \$500 \times [\text{years of service}^* \text{ within congregation}]$$

Provided that the minimum TCC Standard for full-time parochial clergy is \$73,219.

Points are determined as the sum of three factors, calculated from data taken from the most recent Parochial Report:

Total Current Operating Revenues (000s)	x .30
+ Number of Current Adult Pledging Units	x .40
+ <u>Average Current Sunday-Attendance</u>	<u>x .30</u>
= Total Points	

The TCC applicable to a full-time rector, vicar, priest-in-charge or interim shall not be less than 100% of the TCC Standard for the congregation.

The TCC applicable to a full-time curate shall not be less than:

$$\text{TCC Standard (curate)} = [\$68,966 + (141.77 \times \text{Points})] \times 0.60$$

The TCC applicable to a full-time assistant rector shall not be less than:

$$\text{TCC Standard (assistant)} = [\$68,966 + (141.77 \times \text{Points})] \times 0.65$$

+ \$350 x [years of service within the congregation]

The TCC applicable to a full-time associate rector shall not be less than:

$$\text{TCC Standard (associate)} = [\$68,966 + (141.77 \times \text{Points})] \times 0.75$$

+ \$375 x [years of service within the congregation]

*Provided that in each case no more than 10 years of service will be considered in this calculation.

REPORT OF THE COMMITTEE ON CONSTITUTION AND CANONS

The Constitution and Canons Committee of Convention exists to receive, consider, propose and make recommendations on amendments to our Diocesan Constitution and Canons for action by Convention. In addition to formal proposals, we welcome informal conversation from members of our diocese throughout the year, as we often find proposed amendments need further development before they are ready to be presented to Convention.

As a reminder, changes to either the Constitution or the Canons require approval in votes by orders. Constitutional changes must be approved in votes by orders at two consecutive conventions to be adopted.

This year, the committee is reporting two items for action by Convention, the text of which appears on the following pages:

ITEM ONE

The first item is the second reading of a proposed Constitutional amendment to clarify that the secretary and the treasurer of the diocese are entitled to seat and vote in Convention by virtue of holding those offices. This amendment was submitted to Convention last year and was passed by a voice vote in both the lay and clergy orders. If approved at this Convention without amendment in both the lay and clergy orders, it will become effective.

The committee recommends approval of this amendment (Item 1) on second reading.

ITEM TWO

The second item is the first reading of a proposed slate of Constitutional amendments regarding the Diocesan Youth Council (DYC), with the intention of bringing the Constitution's descriptions of the DYC more into line with the current practice over the past decade or so. These amendments do not change the number of DYC members eligible to vote at Convention or to serve on Diocesan Council, or the way those members are selected. Rather, they adjust the Constitution to allow for more (non-voting) DYC members to participate in this ministry that has grown in membership since 1998 when the DYC was added to the Constitution.

Because this slate of amendments includes changes to Article 2 section 2, which may be amended during consideration of Item One at Convention, the committee is publishing two possible versions of Item Two. Option A will be moved if Item One passes; Option B will be moved if Item One does not pass. Both versions of Item Two make the same constitutional changes; the only difference is that of the text they are amending.

The committee recommends approval of these amendments (Item Two) on first reading, and will move either Item Two(a) or Two (b) at Convention.

1. Amendment to Diocesan Constitution Article 2, Section 2 to allow all members of the Diocesan Council, as specified in Article 7 Section 1, a seat and vote at Convention

As approved at Diocesan Convention 2015:

Amend Article 2, Section 2 as follows. Words to be added are underlined and words to be removed are stricken through.

- (a) The Bishops shall each have a seat and vote in the Convention. Subject to Section 4 of this Article, every cleric who is canonically resident in the Diocese, ~~and lay members of the Diocesan Council shall be entitled to a seat and vote in Convention.~~ all members of the Diocesan Council specified in Article 7, Section 1, (excepting clergy who are not canonically resident in this diocese) and members of the Diocesan Youth Council who are at least 16 years of age, shall be entitled to a seat and vote in the Convention.
- (b) Officers of the Corporation, ~~other Members of the Diocesan Council, Diocesan Youth Council and members of the Standing Committee, and Presiding Officers of Diocesan Commissions and Committees~~ and members of Diocesan Youth Council under the age of 16, who are not otherwise entitled to a seat and vote shall be entitled to all privileges of membership in the Convention, except the right to vote. ; provided that members of the Diocesan Youth Council of age 16 or older shall have the right to vote.

Explanation:

In 2007, an amendment to Article 2, Section 2 was presented to Convention to “allow lay members of Diocesan Council vote at Diocesan Convention.” The amendment was approved in 2007 and again in 2008, becoming effective upon the second vote. In 2009, 2010 and 2011 the assistant secretary provided a vote to the diocesan treasurer, reasoning that he was a lay person and a member of Diocesan Council, as designated in Article 7, Section 1(a). In March 2014, the secretary denied the diocesan treasurer a vote for the electing Convention, reasoning that the term “lay member” applied only to Diocesan Council members either elected by the deaneries or appointed by the bishop, and not the diocesan treasurer, diocesan secretary or the Cathedral Chapter representative.

This replacement language for Article 2, Section 2 re-organizes the stipulations and makes clear that all members of Diocesan Council, as specified in Article 7, Section 1(a) are entitled to seat and vote at Convention. The 2015 outgoing diocesan treasurer would like subsequent treasurers to have an uncontested right to vote at Convention.

The committee recommends approval of this amendment (Item 1) on second reading.

2. Amendments to the Diocesan Constitution and Canons to Clarifying the Current Role and Structure of the Diocesan Youth Council

OPTION A: (will be moved if ITEM ONE of this committee's report is adopted).

Amend Article 8 as follows. Words to be added are underlined and words to be removed are stricken through.

There shall be a Diocesan Youth Council ~~composed of twenty members who~~ whose members are in high school grades 9-10 through 12, and are baptized communicants of the Episcopal Church in the Diocese. Membership on the Diocesan Youth Council is by application through the Office of Youth Ministry. Up to twenty members of the Diocesan Youth Council will be given vote at Diocesan Convention with ~~The Diocesan Youth Council shall be composed of one voting member~~ elected from each Deanery, as determined by the Deanery's bylaws, and eight appointed by the Bishop. Each voting member shall be elected or appointed for a one-year term, which can be renewed by deanery vote or bishop appointment if the member continues to meet all eligibility requirements.

Amend Article 2 Section 2 as follows. Words to be added are underlined and words to be removed are stricken through.

(a) The Bishops shall each have a seat and vote in the Convention. Subject to Section 4 of this Article, every cleric who is canonically resident in the Diocese, all members of the Diocesan Council specified in Article 7, Section 1, (excepting clergy who are not canonically resident in this diocese) and voting members of the Diocesan Youth Council as outlined in Article 8 ~~who are at least 16 years of age,~~ shall be entitled to a seat and vote in the Convention.

(b) Officers of the Corporation, members of the Standing Committee, Presiding Officers of Diocesan Commissions and Committees and non-voting members of Diocesan Youth Council ~~under the age of 16,~~ who are not otherwise entitled to a seat and vote shall be entitled to all privileges of membership in the Convention, except the right to vote.

Amend Article 7 Section 1(e) as follows. Words to be added are underlined and words to be removed are stricken through.

Two youth members, ~~who shall be between the ages of 16 and 18 inclusive at the time of their appointment,~~ to be appointed by the Bishop of the Diocese from among members of the Diocesan Youth Council, for a term of one year which can be renewed by bishop appointment if the member continues to meet the eligibility requirements.

OPTION B: (will be moved if ITEM ONE of this committee's report fails to pass).

Amend Article 8 as follows. Words to be added are underlined and words to be removed are stricken through.

There shall be a Diocesan Youth Council ~~composed of twenty members who~~ whose members are in high school grades 9-10 through 12, and are baptized communicants of the Episcopal Church in the Diocese. Membership on the Diocesan Youth Council is by application through the Office of Youth Ministry. Up to twenty members of the Diocesan Youth Council will be given vote at Diocesan Convention with ~~The Diocesan Youth Council shall be composed of one~~ voting member elected from each Deanery, as determined by the Deanery's bylaws, and eight appointed by the Bishop. Each voting member shall be elected or appointed for a one-year term, which can be renewed by deanery vote or bishop appointment if the member continues to meet all eligibility requirements.

Amend Article 2 Section 2 as follows. Words to be added are underlined and words to be removed are stricken through.

The Bishops shall each have a seat and vote in the Convention. Subject to Sec. 4 of this Article, every cleric who is canonically resident in the Diocese, voting members of the Diocesan Youth Council (as outlined in Article 8), and lay members of the Diocesan Council shall be entitled to a seat and vote in the Convention. Officers of the Corporation, other Members of the Diocesan Council, non-voting members of Diocesan Youth Council, and the Standing Committee, and Presiding Officers of Diocesan Commissions and Committees shall be entitled to all the privileges of membership in the Convention, except the right to vote; ~~provided that members of the Diocesan Youth Council of age 16 or older shall have the right to vote.~~

Amend Article 7 Section 1(e) as follows. Words to be added are underlined and words to be removed are stricken through.

Two youth members, ~~who shall be between the ages of 16 and 18 inclusive at the time of their appointment,~~ to be appointed by the Bishop of the Diocese from among members of the Diocesan Youth Council, for a term of one year which can be renewed by bishop appointment if the member continues to meet the eligibility requirements.

Explanation:

As a set, these three amendments will update the Constitution and Canons to more accurately reflect the working policies and practices of the Diocesan Youth Council (DYC) as it has evolved and grown for the past decade or more.

Originally defined as a group of up to 20 youth with voting privileges at Diocesan Convention, the body has grown in size as its mission has expanded in breadth. Currently, there are more than 40 members of the DYC, and in addition to being the voice and representation of youth at Convention, they extend hospitality and leadership to young people across the diocese by planning and hosting youth retreats and other events throughout the year. The amended wording for Article 8 captures the broader body that the DYC is today.

Note that while the size of the DYC has grown over the years, the number of DYC members with voting privileges at Diocesan Convention has not changed, nor has the make-up of the voting members. The changes proposed here do not call for increasing the number of voting members from DYC. The changes proposed here clarify that while up to 20 members of DYC have voice and vote at Diocesan Convention, the voting members are a subset of a broader Diocesan Youth Council.

The other change codified in this amendment is changing eligibility for DYC as young people who are in high school grades 10-12 rather than the currently stated grades 9-12. Ninth and tenth graders are eligible for a separate diocesan youth program, the Youth Leadership Academy, and recent practice has been to limit DYC membership to young people in grades 10-12.

Finally, in the current Constitution and Canons, DYC membership is defined alternately by age in some places and by grade in others. This set of amendments calls for consistently referring to the grades of the young people throughout, as organizing by grade levels is much more common among congregational youth formation programs. The set of amendments further specify the grade level eligibility once, in Article 8, and eliminates the age references elsewhere—for consistency, simplicity and clarity. Note that Massachusetts law does not require any minimum age requirements for serving as a voting member of Diocesan Convention or Diocesan Council.

The committee recommends approval of these amendments (Item 2) on first reading, and will move either Option A or Option B at Convention, as appropriate.

REPORT OF THE COMMITTEE ON RESOLUTIONS

The committee presents four resolutions, each found to be in order in the following form and hereby submitted to the 231st Convention of the Episcopal Diocese of Massachusetts for consideration.

1. Calling for Civility in Political Conversation

Submitted by: Mr. Kevin Miller and The Rev. Rebecca Black

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to refrain from all political and campaign activities that degrade the opposing candidates, parties or individuals with differing opinion; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts condemns the actions of politicians and political candidates that cause vitriolic division between communities; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to uphold those whom they disagree with politically as children of God and brothers and sisters in Christ; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all who are running for office in this and future campaigns, or who hold public office, to stick to the issues, and refrain from personal attack; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts invites neighboring dioceses to enact similar resolutions calling for civility in political campaigns.

Explanation

“Do not let any unwholesome talk come out of your mouths, but only what is helpful for building others up according to their needs, that it may benefit those who listen.”

Ephesians 4:29

In every case where there exists a democratic government, there is bound to be more than one opinion as to how to accomplish the tasks that build us up. Such has been the case ever since the establishment of our nation more than 240 years ago. And while there has always been some amount of strife in such debates, the level to which we see it today is alarming.

In particular with political campaigns, we see a lot of energy going into attacks on the character of the candidate, not on where they stand on issues. On issues before our legislatures and Congress, we see our representatives calling each other names, or questioning one another's patriotism, simply because they have a different opinion on what they believe is right for the state or country.

In our baptismal covenant, we promise to “strive for justice and peace among all people, and respect the dignity of every human being.” (BCP, page 305) By allowing these practices to continue, we prevent peace and justice from flourishing, and we trample upon the dignity of those who have a right to be heard. It is therefore paramount that we stand up for civility in the political arena.

Statement Against

The tension that the democratic process brings is natural. The increase in vitriol in American politics is exaggerated, and not that big of a deal. What is the effectiveness of such a resolution? What can a resolution from the Diocese of Massachusetts do? The church should not make commentary on the political process itself.

Implementation Requirements

Request assistant secretary of the Convention to send a letter out to our fellow Province I dioceses with the resolution, encouraging them to take similar action. Postage required.

2. Calling for Reconciliation Following the Divisive Rhetoric of the Recent Presidential Election

Submitted by: Mr. Kevin Miller and The Rev. Rebecca Black

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts calls upon all members to seek reconciliation and healing of the deep divides in our country caused by the rhetoric of the most recent presidential election; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts urges its parishes to engage in studies about conflict using a program such as *Good News: A Scriptural Path to Reconciliation* by the Rt. Rev. Steven Charleston, as recommended for use by Bishop Gates in his 2014 convention address; and be it further

Resolved, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts invites neighboring dioceses to enact similar resolutions calling for healing and reconciliation following the divisiveness of the rhetoric from this previous election.

Explanation

“If you are offering your gift at the altar, and there remember that your brother has something against you, leave your gift there before the altar and go; first be reconciled to your brother, and then come and offer your gift.” Matthew 5:23, 24

Division in the country when it comes to politics is not uncommon. This past presidential election, however, raised divisiveness to a dangerous level unseen in a generation. While past elections have divided people over how this country should be run, this election has pitted people against each other on the basis of race, class, religion and gender. The unusually vehement rhetoric has exploited already existing fracture lines in American society, thereby making reconciliation more difficult.

As the Body of Christ, we offer the Good News of reconciliation, and can be agents of it. We are aware that in order for reconciliation to be enacted, there needs to be awareness that people have been hurt, and with that there needs to be willingness and tools for dialogue across differences.

Statement Against

Healing the country is too large a task for the Diocese of Massachusetts. It's too soon to begin the process of reconciliation. More time needs to pass. Reconciliation is a long and arduous process, especially where injustice continues to exist.

Implementation Requirements

Request assistant secretary of the Convention to send a letter to our fellow Province I dioceses with a copy of the resolution and encouraging them to take similar action. Postage required.

We encourage each parish to invest in a program such as Bishop Steven Charleston's book *Good News: A Scriptural Path to Reconciliation*. It is available online at Forward Movement for \$2.50.

3. Continued Peace Building in the Diocese of Massachusetts

Submitted by: The Rev. Elizabeth Steinhauser, The Rev. Timothy E. Crellin, The Rev. Edwin D. Johnson, The Rev. Amy McCreath, The Rev. Martha L. Hubbard, The Rev. R. Arrington Chambliss, The Rev. Margot Critchfield, The Rev. Ken Schmidt, The Rev. Noah Van Niel

Resolved, that the Diocesan Convention accept the call from the House of Bishops to pray and work for the end of gun violence through support for the Jorge Fuentes Antiviolence Task Force ("the Task Force"), and urge all congregations and members to engage in the specific actions prioritized by the Task Force in its B-PEACE for Jorge Campaign as follows:

1. Work and organize for fair, common-sense gun law reform that will keep our communities safe and prevent future tragedies;
2. Support positive programs for youth, create employment opportunities and work with under-resourced schools;
3. Bear witness through vigils, participation in public forums, peace walks or other public actions to the urgent need to end senseless gun violence;
4. Establish ongoing conversations and programs in communities to increase understanding about the impact and the root causes of gun violence, including the role of law enforcement; and be it further

Resolved, that the Jorge Fuentes Antiviolence Task Force continue to fulfill its charge to bring God's peace to all people by furthering the understanding of gun violence and continuing to take action to end it, including offering resources that support congregations in their efforts and report these efforts to the 232nd Convention of the Diocese in 2017; and be it further

Resolved, that the Jorge Fuentes Antiviolence Task Force report back to the 232nd Convention of the Diocese of Massachusetts its progress and findings to strengthen efforts to alleviate the root causes of gun violence.

Explanation

In 2012, in response to the shooting death of Jorge Fuentes, a much loved member and leader of youth programs at St. Stephen's Church in Boston, the Convention created the Jorge Fuentes Antiviolence Task Force ("the Task Force") to identify and promote specific initiatives to address the issue of violence, particularly gun violence. The tragedy in Newtown, followed by the killings at a Bible study group in a church in Charleston, South Carolina, and mass killings in Aurora, Oak Creek, Paris, Orlando and many more cities in this country and across the world, calls for urgency in the pursuit of peace. In addition to the highly publicized mass shootings, God's children die daily in the streets of Boston and every city in this country, and tragic suicides by guns in America continue at the rate of 58 per day. Thirty thousand Americans die each year from gun violence.

Following the research phase of the Task Force in 2012, the following framework of five action areas was determined to be key in addressing the root causes of violence:

1. High quality academic and enrichment programs for youth and young adults (age 5-25)
2. Meaningful employment for teens and young adults (age 14-25)
3. Improved urban public schools, especially high schools
4. Accessible resources and support for families
5. Reform of gun control laws resulting in the elimination of illegal guns from our communities

Since its inception, the Task Force has supported existing youth programs, both within and outside the diocese, lobbied to increase employment opportunities for young people and served as the employer of teen community organizers, trained leaders in Province 1 to form church-school partnerships and canvassed to increase state spending on public education, supported centers providing trauma and healing counseling for homicide survivors, and pushed for legislation and market-based campaigns reducing access to illegal guns.

In our baptismal covenant we commit to strive for justice and peace among all people and respect the dignity of every human being. The resolution calls on all congregations and their members to undertake this urgent call by supporting and participating in the work of the Task Force. The resolution calls for a report to the Convention next year on the work that has been done.

Statement Against

Congregations are already being asked to do much work which distracts from the essential worship and stewardship that must be the core activity of each congregation. Ownership and use of guns is protected by our Constitution and cannot be restricted or discouraged. Gun violence is the product of individual decisions, not guns themselves, and the best protection is to arm more people to protect themselves and the public.

Implementation Requirements

The work to implement the resolution will be done by the members of the Jorge Fuentes Antiviolence Task Force, its subcommittees and its organizers.

4. Keeping Housing Affordable: A Baptismal Priority

Submitted by: The Rev. Holly Lyman Antolini, Ms. Sylvia Weston, The Rev. Edwin D. Johnson, The Rev. Rainey G. Dankel, Ms. Judith Radtke, Ms. Lauren Zook, Mr. Scott McIntyre

Resolved, that the 231st Convention of the Episcopal Diocese of Massachusetts encourage congregations to address the pressing need for affordable housing in their communities, becoming familiar with the Community Preservation Act (CPA), a state program adopted in 161 Massachusetts cities and towns, and its impact in providing new, locally controlled public funds to support affordable housing, parks and recreation, and historic preservation in those communities, and sharing information on CPA in preparation for the November 8 Referendum in Boston.

Explanation

As housing costs rise in Boston and in communities throughout eastern Massachusetts, many economically vulnerable people find themselves facing prohibitive rent increases and eviction, often from housing they have occupied for a long time in communities that are gentrifying. Many literally have no affordable place to go, or are forced to find housing in locations that necessitate a prohibitively expensive commute to work. Similarly, younger families and individuals seeking to purchase their first home are also priced out of the market. In order for our communities to remain economically and socially diverse and healthy, we need to prioritize the protection and creation of affordable housing, in a flexible program with proven effectiveness that generates new public money but leaves the local community free to determine the best expenditure of these funds for this purpose, as well as for historic preservation and parks and recreation. To date, 161 communities have already adopted CPA and it's working for them. Is yours one of them? Or is NOW the "acceptable time" to move your community in this direction?

Statement against

Additional property taxes are prohibitive for homeowners and small businesses. More drastic measures are needed to ensure that people can remain in their homes (such as a "just cause" ordinance). This is a Boston issue.

Implementation Requirements

The proposers of this resolution are providing information from the Greater Boston Interfaith Organization for delegates to the Convention to take home to their congregations.

A BRIEF SUMMARY OF ROBERT'S RULES OF ORDER

The following is a very brief and highly condensed review of the various motions that can be made according to Robert's Rules of Order, generally accepted as a manual of Parliamentary Procedure. This condensation is a general guide only and does not begin to address the many exceptions and complexities of Parliamentary Procedure.

General Classification of Motions (these are in ascending order of precedence, i.e. the Principal or Main Motion has no precedence over any other motion):

Principal or Main Question or Motion: This must be moved and seconded before Subsidiary or Incidental Questions can be moved.

Subsidiary or Secondary Motions: These take precedence of a Principal Question and must be decided before the Principal Question can be acted upon.

- Postpone Indefinitely
- Amendment
- Amend the Amendment
- Refer to a Committee
- Postpone to a Definite Time
- Limit or Extend Debate * +
- Call the Previous Question (Close debate) * +
- Lay on the Table *

Incidental Questions: These arise out of other questions and take precedence of and are to be decided before the questions which give rise to them. These cannot be amended and are undebatable except an Appeal (which is debatable when it relates to rules of speaking or priority of business or while a previous question is pending).

- Withdraw a Motion *
- Suspend the Rules * +
- Read Papers (Request for reading of the motion before a vote is taken) *
- Point of Order *
- Point of Information *
- Objection to the Consideration of a Motion * +
- Division of a Question *
- Division of Assembly (Vote by Orders) *
- Appeal (to a ruling of the Chair)

Privileged Questions: These take precedence of all other questions whatever and are undebatable:

- Call for Orders of the Day (specific motions to be considered at a specific time) *
- Questions relating to the Rights and Privileges of the Assembly or its Members *
- Take Recess *
- Adjourn *
- Fix time to Adjourn *

A call for Quorum is appropriate at any time and is non-debatable.

* *Undebatable* + *Requires two-thirds vote*

Note: *The standing diocesan Rules of Order, which are part of the diocesan canons, give some information about the precedence of certain motions. Below is a summary of some of these Rules:*

Rule IV lists these specific motions in this order of precedence: 1) to lay on the table; 2) to postpone to a day certain; 3) to postpone indefinitely; 4) to limit debate by taking a vote at a time certain, or by determining the time allowed for each speech; (5) to commit; and 6) to amend.

Rule V states that a motion with distinct propositions can be divided at the request of any member.

Rule VI states that all amendments will be considered in the order in which they are moved. An amendment may be amended, but no amendment may be made to the second amendment, but a substitute for the whole matter may be made.

Rule VII states that a motion to lay upon the table shall be decided without debate.

Rule XII states that a question having been decided shall not be reconsidered during the same session, without the consent of two-thirds of the members present, nor unless the motion to reconsider be made and seconded by members who voted in the majority on the original motion.

CONVENTION COMMITTEES

2016

Leon A. Brathwaite II, Secretary
Laura Simons, Assistant Secretary

Dispatch of Business

Ms. Rebecca Alden
Mr. Patrick LaFortune (Chair)
Ms. Betsy Ridge Madsen
Ms. Laura Simons

Qualifications

Mr. Jeffrey Bishop
The Ven. Michael Hamilton
Ms. Hazel Johnson
Ms. Suzette Phillips
The Rev. Paula Toland (Chair)

Constitution and Canons

The Rev. Terry Hoffman
Ms. Bernie Jones
The Rev. Mally Lloyd
The Rev. Christopher Wendell (Chair)

Elections

The Rev. Bob Greiner
Ms. Amanda March
Ms. Susannah Perkinson
The Rev. Harry Walton (Chair)

Resolutions

The Rev. Holly Antolini (Chair)
The Rev. Canon Edie Dolnikowski
The Rev. Edwin Johnson
Ms. Marilyn McMillan
The Rev. Karen Montagno
Mr. Terry Robinson
John Woodard, Esq.

Admission of Parishes and Missions

The Rev. Rebecca Black
Mr. Spencer Alphonso Felder
The Rev. Regina Walton (Chair)

Convention Steering Committee

Mr. Leon Brathwaite II
Ms. Ethel Crawford
Ms. Claudette Hunt
The Rev. Edwin Johnson
Mr. Lynd Matt
The Rev. Karen Montagno
The Rev. Canon Bill Parnell
Ms. Suzette Phillips
Mr. Jamie Reamer
The Rev. Sam Rodman
The Very Rev. Jep Streit
Ms. Laura Simons
Ms. Tracy Sukraw

Diocesan Liturgy Committee

The Rev. Katharine Black
The Rev. Christian Brocato
The Rev. Isaac Everett
The Rev. Elise Feyerherm
Sr. Kristina Frances, SSM
The Rev. Thea Keith-Lucas

Proposed 2017 Diocesan Budget

231st Annual Convention of the Episcopal Diocese of Massachusetts
Holiday Inn, Mansfield



Let us pray:

*Lord Jesus Christ, we come before you as a people of God,
seeking to join your transforming work in the world.
Open our eyes to see the movement of your Spirit.
Open our minds to imagine new possibilities.
Open our ears to hear the voices of all your children.
Open our mouths to speak with honesty and love.
Open our hands to share all that we have.
Open our hearts to receive all that we need.
Thank you, Lord, for calling us as your disciples and friends.
Give us courage to follow where you lead. Amen.*

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Budget Committee

(Term ends in November of the year listed)

Lisa Garcia (2016), Treasurer

Stephen Voysey (2016), Chair

Matthew Cadwell (2017)

Ellen Sheehy (2017)

Barbara Williamson (2017)

Jane Bearden (2018)

Virginia Rogers (2018)

Ted Ts'o (2018)

Charles Jordan, Controller

William Parnell, Canon to the Ordinary

Laura Simons, Assistant Secretary

Gerry Sullivan, Chief Business Officer and Assistant Treasurer



Episcopal Diocese of Massachusetts

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Dear Friends in Christ,

This booklet presents the proposed budget for the Episcopal Diocese of Massachusetts for the calendar year 2017. Its overarching purpose is to provide you with both clarity and transparency with regard to the financial operations of the diocese. Along with the dollar amounts, we have included narratives which explain the budget line items.

During 2016, the people of the diocese have been engaged in the consideration of a new mission strategy, the results of which may be found elsewhere in the convention materials and on the diocesan Web site. The mission strategy provides guidance to us, as a diocesan family, with regard to the use of all our resources, including our financial priorities. As the mission strategy discernment process and the 2017 budget formation process were ongoing simultaneously, the 2017 budget generally continues program expenses according to the priorities of the existing mission strategy. Having said that, the proposed 2017 budget includes funds intended to cover start-up expenses for implementing elements of the new mission strategy. These funds are available to Diocesan Council to be directed as needs for such implementation arise during 2017.

The 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. Putting a budget together is both a rewarding and a humbling experience, and relies on many people. We want to thank Acting Chief of Staff Sam Rodman and Canon to the Ordinary Bill Parnell, Chief Business Officer Gerry Sullivan, Controller Charles Jordan, Assistant Secretary Laura Simons, the Budget Committee members, participants at the budget hearings, ministry area leaders and members of Diocesan Council for their work and guidance once again this year. We are also grateful to Bishop Alan Gates and Bishop Gayle Harris for their clear priorities and support.

Having now completed two three-year terms on the Budget Committee, Stephen Voysey concludes his service as chair of the Budget Committee. Bishop Gates will be appointing a new chair and a new class of 2019 will be joining the committee going forward.

May God bless each of us as we strive to be good stewards of all the gifts which we have been given by the God of grace.

Lisa M. Garcia
Treasurer

The Rev. Stephen O. Voysey
Chair, 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 about expenses and two to hear from representatives of strategic ministries. 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. Income and expenses from the Together Now campaign are reported on page 44.

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.

MOVED, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2017 Diocesan Revenues, Core and Supplemental, described in the Proposed 2017 Diocesan Budget and summarized on pages 6 and 7, including the schedule of individual parish and mission assessments for 2017 listed on pages 9 through 14, with the adjustments approved by the Assessment Coordinating Committee and the Diocesan Council on page 15.

MOVED, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts approve the Schedule of 2017 Diocesan Expenses, Core and Supplemental, described in the Proposed 2017 Diocesan Budget and summarized on pages 6 and 7.

Episcopal Diocese of Massachusetts				
Summary of Core Operations				
2017 Budget, 2016 Budget and 2015 Actual				
	CORE			
	2017	2016	Budget	2015
	Budget	Budget	Variance	Actual
<u>Revenue</u>				
Assessments before adjustments	5,139,654	5,083,633	56,021	4,936,994
Less adjustments	(75,000)	(81,830)	6,830	(48,371)
Assessments after adjustments	5,064,654	5,001,803	62,851	4,888,623
Less reserve for Uncollected Assessments	(20,000)	(35,805)	15,805	(191,179)
Agency Fund draws	1,033,809	1,003,818	29,991	896,434
Trust Fund draws	867,489	818,465	49,024	1,408,077
Congregational contributions	58,000	58,000	-	45,250
Interest income	8,000	15,000	(7,000)	38,552
Dividend income	78,000	78,000	-	85,856
Total Revenue	7,089,952	6,939,281	150,671	7,171,613
<u>Expense</u>				
Deaneries, Congregations and Clergy	824,843	996,206	(171,363)	929,808
Congregational Resources and Training	1,203,029	1,210,089	(7,060)	1,037,524
Strategic Ministries	1,275,792	1,248,108	27,684	1,177,380
Episcopal and Diocesan Support	2,300,394	2,125,010	175,384	2,181,116
Administrative Services	1,485,894	1,359,868	126,026	1,327,796
	7,089,952	6,939,281	150,671	6,653,624
Net surplus (deficit) - Core	-	-	-	517,989

Episcopal Diocese of Massachusetts										
Supplemental Budget by Funding Source										
2017 Budget, 2016 Budget and 2015 Actual										
2017 Budget										
					Proceeds			Fee		2016
					from Closed			Revenue	TOTAL	Budget
2017 Budget	BDF Grants	Annual Fund Grants	Contributions	Grants	Parishes	In Kind	Transfers	Revenue	TOTAL	TOTAL
1101	Making Excellent Disciples	20,000			-				20,000	20,000
1211	Sabbaticals	17,500					9,055		26,555	26,321
1212	Continuing Education	10,000							10,000	10,000
1221	Clergy Dependent Scholarships	33,337							33,337	33,337
1223	Dill Scholarship	3,359							3,359	3,264
1231	Support for Retired Clergy	5,500					(5,500)		-	-
1321	Fresh Start/New Call			8,333			(8,333)		-	-
1341	Clergy Family Network	1,000					(1,000)		-	-
2014	Congregational Program Grants	25,000	10,000						35,000	35,000
2221	Program Support	5,000							5,000	-
2222	Family Camp								-	-
3056	Life Together	45,938	102,062	69,000	95,000	65,000	75,000	257,000	709,000	781,000
3111	MIT Chaplaincy	3,363					(3,363)		-	-
3131	Boston College	250					(250)		-	-
3141	Northeastern	250					(250)		-	-
3221	Brockton, Grace Chapel					114,006			114,006	111,771
3311	Boston, Chinese Ministries			47,000	3,000				50,000	50,000
3321	Quincy, Chinese Ministries							10,000	10,000	10,000
3331	Dorchester, St. Mary's	50,000							50,000	50,000
3361	Watertown, Good Shepherd	30,000							30,000	45,000
3371	S. Dartmouth, St. Peter's The Bridge	45,000							45,000	65,000
3411	Urban Resident		11,719						11,719	11,719
3511	Jubilee Global Mission	3,575		30,784			45,000		79,359	75,784
3541	B-SAFE	125,000	125,000						250,000	225,000
3545	B-PEACE		50,000						50,000	50,000
3911	Cathedral Church of St. Paul	77,000							77,000	71,000
4311	Development	193,373					57,366		250,739	232,344
4312	Annual Fund		30,000						30,000	30,000
4343	Mission Hubs						200,000		200,000	200,000
		694,445	328,781	146,784	106,333	114,006	65,000	367,725	267,000	2,090,074
2015 Actual										
					Proceeds			Fee		
					from Closed			Revenue	TOTAL	
2015 Actual	BDF Grants	Annual Fund Grants	Contributions	Grants	Parishes	In Kind	Transfers	Revenue	TOTAL	
1101	Making Excellent Disciples	-			-				-	-
1211	Sabbaticals	17,500					(8,203)		9,297	
1212	Continuing Education	10,000					-		10,000	
1221	Clergy Dependent Scholarships	34,244		100					34,344	
1231	Support for Retired Clergy						5,300		5,300	
1311	Commission on Ministry	10,020							10,020	
1312	Seminarians			11,398			7,612		19,010	
1341	Clergy Family Network						1,000		1,000	
2014	Congregational Program Grants		10,000			43,077			53,077	
3056	Life Together	34,151	115,000	171,428	70,000	70,000	(75,000)	248,561	634,140	
3111	MIT Chaplaincy						3,108		3,108	
3221	Brockton, Grace Chapel					107,661			107,661	
3231	Chelsea, St. Luke's/San Lucas			37,340		-			37,340	
3251	South End, St. Stephen's		50,000						50,000	
3311	Boston, Chinese Congregation			48,524					48,524	
3321	Quincy, Chinese Congregation			13,000					13,000	
3331	Dorchester, St. Mary's	50,000							50,000	
3361	Watertown, Good Shepherd					60,000			60,000	
3411	Urban ResidentS	18,750							18,750	
3511	Jubilee Global Mission			-			-		-	
3541	B-SAFE	100,000	125,000						225,000	
3545	B-PEACE		50,000	-					50,000	
3911	Cathedral Church of St. Paul	65,000							65,000	
4012	Suffragan Bishop								-	
4311	Development	161,839	26,000				58,000		245,839	
4312	Annual Fund		-	(170,081)					(170,081)	
4343	Mission Hubs						-		-	
		501,504	376,000	74,369	107,340	210,738	70,000	(8,183)	248,561	1,580,329

Summary of Functional Expenses by Type

	2017 Budget		2016 Budget		2015 Actual	
	Budget	% of total	Budget	% of total	Actual	% of total
CORE BUDGET						
Program expenses	2,309,701	33%	2,368,330	34%	2,235,902	34%
Compensation and benefits	3,470,412	49%	3,394,224	49%	3,221,329	48%
Operational and support services	1,378,841	19%	1,316,316	19%	1,344,533	20%
Management and professional services	245,200	3%	253,200	4%	255,849	4%
Total expenses	7,404,154	104%	7,332,070	106%	7,057,613	106%
Less fees and other transfers	(314,202)	-4%	(392,789)	-6%	(383,990)	-6%
Net functional expenses	7,089,952	100%	6,939,281	100%	6,673,623	100%
SUPPLEMENTAL BUDGET						
Program expenses	1,019,620	49%	1,021,541	48%	796,005	30%
Compensation and benefits	858,516	41%	784,912	37%	1,425,263	53%
Operational and support services	179,000	9%	318,087	15%	424,253	16%
Management and professional services	32,938	2%	12,000	1%	44,838	2%
Total expenses	2,090,074	100%	2,136,540	100%	2,690,359	100%

2017 ASSESSMENTS BY DEANERY

CODE
M?
BASE
FORMULA ASSESSMENT
ADJUSTMENT
ASSESSMENT
EFFECTIVE RATE
PRIOR YEAR ASSESSMENT
DIFFERENCE
PRIOR YEAR ADJUSTMENT

diocesan church code
"M" if a mission
line 14 less line 7 from the 2014 Parochial Report
15.5% * BASE, LESS \$6,000
initially 0; determined by committee and council
formula less adjustment - THIS IS WHAT CONVENTION VOTES
the proposed assessment divided by the BASE, expressed as a percent
after any adjustment
between 2017 proposed and 2016 prior year assessments
amount of any adjustment received prior year

ALEWIFE

CODE	M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
2010	Arlington, Church of Our Saviour	136,123	15,099	2,172	12,927	9.5	15,561	-2,634	0
2015	Arlington, St. John's Church	186,560	22,917	3,241	19,676	10.5	22,251	-2,575	2,782
2025	Bedford, St. Paul's Church	188,661	23,242	0	23,242	12.3	22,382	860	0
2030	Belmont, All Saints' Church	220,781	28,221	0	28,221	12.8	28,154	67	0
2045	Burlington, St. Mark's Church	89,692	7,902	0	7,902	8.8	10,209	-2,307	0
2050	Cambridge, Christ Church	755,996	111,179	0	111,179	14.7	94,623	16,556	0
2055	Cambridge, St. Bartholomew's Church	182,652	22,311	0	22,311	12.2	20,583	1,728	0
2060	Cambridge, St. James's Church	389,956	54,443	0	54,443	14.0	45,626	8,818	0
2065	Cambridge, St. Peter's Church	252,993	33,214	0	33,214	13.1	32,908	306	0
2085	Lexington, Church of Our Redeemer	396,167	55,406	4,392	51,014	12.9	51,913	-899	3,095
2135	Somerville, St. James's Church	81,133	6,576	0	6,576	8.1	6,378	198	0
2145	Waltham, Christ Church	163,846	19,396	0	19,396	11.8	21,382	-1,986	0
2150	Watertown, Church of the Good Shepherd	118,772	12,410	0	12,410	10.4	7,834	4,576	0
	TOTALS:	3,163,332	412,316	9,805	402,511	12.7	379,803	22,708	5,877

BOSTON HARBOR

CODE	M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4035	Boston, Church of St. Augustine & St. Martin	121,136	12,776	0	12,776	10.5	13,333	-556	0
4010	Boston, Church of the Advent	830,326	122,701	0	122,701	14.8	150,330	-27,630	0
4025	Boston, Emmanuel Church	275,080	36,637	0	36,637	13.3	25,201	11,437	0
4070 M	Boston, St. Stephen's Church	54,334	1,615	0	1,615	3.0	299	1,315	-1,301
4075	Boston, Trinity Church	2,678,925	409,233	0	409,233	15.3	406,052	3,182	0
1030	Charlestown, St. John's Church	182,973	22,361	0	22,361	12.2	21,852	509	0
4055	Dorchester, St. Mark's Church	134,070	14,781	0	14,781	11.0	14,199	582	0
4060	Dorchester, St. Mary's Church	95,430	8,792	0	8,792	9.2	9,200	-409	0
3020	Jamaica Plain, St. John's Church	168,848	20,171	0	20,171	11.9	19,839	332	0
4040	Roxbury, St. Cyprian's Church	115,733	32,111	0	32,111	0.0	26,760	5,351	0
4050	Roxbury, St. John St. James Church	11,939	11,939	0	11,939	10.3	13,020	-1,082	0
	TOTALS:	4,656,855	693,116	0	693,116	14.9	700,086	-6,969	-1,301

CAPE AND ISLANDS

M? CHURCH

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
6005	540,709	77,810	0	77,810	14.4	69,042	8,768	0
6010	121,852	12,887	0	12,887	10.6	13,963	-1,076	0
6015	572,519	82,740	0	82,740	14.5	72,987	9,753	0
6020	268,014	35,542	0	35,542	13.3	37,139	-1,597	0
6030	500,979	71,652	0	71,652	14.3	71,964	-312	0
6040	278,969	37,240	0	37,240	13.3	37,606	-366	5,000
6045	471,889	67,143	0	67,143	14.2	60,708	6,435	0
6050	11,825	0	0	0	0.0	0	0	0
6055	535,630	77,023	0	77,023	14.4	74,799	2,224	0
6060	338,195	46,420	6,700	39,720	11.7	54,263	-14,543	0
6065	325,190	44,404	0	44,404	13.7	43,467	937	5,000
6070	176,347	21,334	0	21,334	12.1	21,789	-455	0
6075	169,142	20,217	0	20,217	12.0	31,405	-11,188	5,857
6095	209,437	26,463	0	26,463	12.6	32,705	-6,243	0
6080	254,491	33,446	0	33,446	13.1	36,690	-3,244	0
6085	199,708	24,955	8,000	16,955	8.5	26,131	-9,176	8,000
6090	24,023	0	0	0	0.0	0	0	0
6025	250,707	32,860	0	32,860	13.1	31,456	1,404	0
TOTALS:	5,249,626	712,136	14,700	697,436	13.3	716,114	-18,678	23,857

CHARLES RIVER

M? CHURCH

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
3120	0	0	0	0	0.0	16,465	-16,465	0
3030	368,321	51,090	0	51,090	13.9	47,161	3,929	0
3035	281,886	37,692	0	37,692	13.4	40,258	-2,565	0
3045	332,388	45,520	0	45,520	13.7	46,317	-796	0
3125	886,487	131,405	0	131,405	14.8	129,087	2,318	0
3060	278,374	37,148	0	37,148	13.3	36,998	150	0
3105	492,528	70,342	0	70,342	14.3	68,347	1,994	0
3145	281,227	37,590	0	37,590	13.4	35,943	1,647	0
3135	201,034	25,160	0	25,160	12.5	22,246	2,914	0
3140	366,603	50,823	0	50,823	13.9	52,277	-1,453	0
3110	331,732	45,418	0	45,418	13.7	40,948	4,470	0
3130	141,684	15,961	0	15,961	11.3	18,008	-2,047	0
3115	353,029	48,719	0	48,719	13.8	49,650	-930	0
3165	894,446	132,639	0	132,639	14.8	143,696	-11,057	0
TOTALS:	5,209,739	729,510	0	729,510	14.0	747,402	-17,892	0

CONCORD RIVER

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
2005 Acton, Church of the Good Shepherd	301,760	40,773	0	40,773	13.5	36,767	4,006	0
2020 Ayer, St. Andrew's Church	149,973	17,246	0	17,246	11.5	15,402	1,844	0
2075 Concord, Trinity Church	648,344	94,493	0	94,493	14.6	91,768	2,725	0
3065 Framingham, St. Andrew's Church	262,469	34,683	0	34,683	13.2	34,859	-177	0
3075 Holliston, St. Michael's Church	151,325	17,455	0	17,455	11.5	17,838	-383	0
3080 Hopkinton, St. Paul's Church	92,412	8,324	1,521	6,803	7.4	12,082	-5,279	6,000
2080 Hudson, St. Luke's Church	57,657	2,937	0	2,937	5.1	4,133	-1,196	0
2090 Lincoln, St. Anne's in-the-Fields Church	559,025	80,649	0	80,649	14.4	83,152	-2,503	0
3100 Natick, St. Paul's Church	447,955	63,433	0	63,433	14.2	59,527	3,906	0
2125 Shirley, Trinity Chapel	72,940	5,306	0	5,306	0.0	0	5,306	0
3155 Southborough, St. Mark's Church	251,828	33,033	0	33,033	13.1	34,463	-1,430	0
2140 Sudbury, St. Elizabeth's Church	461,388	65,515	0	65,515	14.2	51,670	13,845	0
2165 Weston, St. Peter's Church	448,757	63,557	0	63,557	14.2	67,541	-3,984	3,000
TOTALS:	3,905,833	527,404	1,521	525,883	13.5	509,202	16,681	9,000

MERRIMACK VALLEY

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1005 Amesbury, St. James's Church	93,869	8,550	0	8,550	9.1	9,839	-1,289	0
1010 Andover, Christ Church	556,265	80,221	0	80,221	14.4	80,955	-734	0
2070 Chelmsford, All Saints' Church	284,375	38,078	0	38,078	13.4	37,949	129	0
1055 Groveland, St. James's Church	125,550	13,460	0	13,460	10.7	14,758	-1,298	0
1065 Haverhill, Trinity Church	179,404	21,808	0	21,808	12.2	18,674	3,133	0
1075 Lawrence, Grace Church	150,991	17,404	0	17,404	11.5	13,857	3,547	0
2095 Lowell, St. Anne's Church	188,218	23,174	5,000	18,174	9.7	25,207	-7,033	5,000
2100 Lowell, St. John's Church	48,443	1,509	0	1,509	3.1	1,794	-285	0
1125 Methuen, St. Andrew's Church	73,266	5,356	0	5,356	7.3	4,420	937	0
1130 Newburyport, St. Paul's Church	305,272	41,317	6,324	34,993	11.5	38,066	-3,073	0
1135 North Andover, St. Paul's Church	175,835	21,254	0	21,254	12.1	23,540	-2,286	0
2040 North Billerica, St. Anne's Church	186,695	22,938	0	22,938	12.3	23,064	-127	0
1195 M West Newbury, All Saints' Church	120,067	8,407	0	8,407	7.0	5,456	2,951	0
2160 Westford, St. Mark's Church	133,347	14,669	0	14,669	11.0	11,040	3,629	0
TOTALS:	2,621,597	318,144	11,324	306,820	11.7	308,618	-1,798	5,000

MT HOPE BUZZARDS BAY

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
5030 Fairhaven, Church of the Good Shepherd	32,652	0	0	0	0.0	0	0	0
5035 Fall River, Church of the Holy Spirit	210,952	26,698	0	26,698	12.7	28,376	-1,678	0
5045 Fall River, St. Luke's Church	23,144	0	0	0	0.0	0	0	0
5070 Marion, St. Gabriel's Church	425,133	59,896	0	59,896	14.1	52,242	7,654	0
5080 New Bedford, Grace Church	499,255	71,385	0	71,385	14.3	72,911	-1,526	0
5085 New Bedford, St. Andrew's Church	71,434	5,072	0	5,072	7.1	5,573	-500	0
5090 New Bedford, St. Martin's Church	83,917	7,007	0	7,007	8.4	5,093	1,914	0
5110 Somerset, Church of Our Saviour	133,946	14,762	4,482	10,280	7.7	14,280	-4,000	4,000
5020 South Dartmouth, St. Peter's Church	53,080	2,227	0	2,227	4.2	1,727	501	0
5115 Swansea, Christ Church	152,747	17,676	0	17,676	11.6	16,751	925	0
TOTALS:	1,686,260	204,722	4,482	200,240	11.9	196,952	3,288	4,000

MYSTIC VALLEY

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1035 M Chelsea, St. Luke's/San Lucas Church	92,195	5,527	0	5,527	6.0	3,896	1,631	0
1025 M East Boston, Grace Church Federated	0	0	0	0	0.0	0	0	0
1045 Everett, Grace Church	109,251	10,934	0	10,934	10.0	0	10,934	0
1095 Lynnfield, St. Paul's Church	193,923	24,058	4,720	19,338	10.0	19,338	0	0
1105 Malden, St. Paul's Church	123,718	13,176	4,000	9,176	7.4	12,136	-2,960	4,000
2115 Medford, Grace Church	312,075	42,372	0	42,372	13.6	40,534	1,838	0
1120 Melrose, Trinity Parish	209,769	26,514	0	26,514	12.6	26,178	336	0
1145 Reading, Church of the Good Shepherd	168,108	20,057	0	20,057	11.9	19,142	915	0
1170 Saugus, St. John's Church	136,866	15,214	6,000	9,214	6.7	9,159	56	0
1175 Stoneham, All Saints' Church	65,611	4,170	0	4,170	6.4	5,088	-918	0
1190 Wakefield, Emmanuel Church	172,994	20,814	0	20,814	12.0	17,671	3,143	0
2170 Wilmington, St. Elizabeth's Church	43,282	709	0	709	1.6	988	-279	0
2175 Winchester, Parish of the Epiphany	697,799	102,159	0	102,159	14.6	97,887	4,272	0
1200 Winthrop, St. John's Church	136,400	15,142	0	15,142	11.1	12,884	2,258	0
2180 Woburn, Trinity Church	80,750	6,516	0	6,516	8.1	7,405	-889	0
TOTALS:	2,542,741	307,361	14,720	292,641	11.5	272,306	20,335	4,000

NEPONSET RIVER

M? CHURCH

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4085	147,781	16,906	0	16,906	11.4	17,638	-732	0
3050	88,296	7,686	0	7,686	8.7	7,686	-1,376	0
3055	321,864	43,889	0	43,889	13.6	47,287	-3,398	0
4015	368,834	51,169	0	51,169	13.9	53,099	-1,930	0
3005	60,968	4,464	0	4,464	7.3	0	4,464	0
3015 M	0	0	0	0	0.0	0	0	0
4030	229,363	29,551	0	29,551	12.9	32,115	-2,564	0
3085	210,429	26,616	0	26,616	12.6	24,142	2,474	0
3090	49,054	1,603	0	1,603	3.3	5,117	-3,514	0
4130	471,946	67,152	0	67,152	14.2	67,473	-321	0
3150	119,586	12,536	0	12,536	10.5	12,492	44	0
5105	49,035	1,600	0	1,600	3.3	1,493	107	0
4160	62,063	3,620	0	3,620	5.8	5,789	-2,169	0
3160	209,372	26,453	7,000	19,453	9.3	24,930	-5,477	7,000
3010	89,403	7,857	0	7,857	8.8	3,439	4,418	0
3170	92,126	8,280	0	8,280	9.0	11,396	-3,116	0
TOTALS:	2,570,120	309,383	7,000	302,383	11.8	315,472	-13,089	7,000

NORTH SHORE

M? CHURCH

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1015	499,546	71,430	0	71,430	14.3	69,541	1,889	0
1021	238,348	30,944	0	30,944	13.0	30,565	379	0
1143	168,067	20,050	0	20,050	11.9	10,644	9,406	0
1050	222,672	28,514	0	28,514	12.8	28,013	501	0
1070	229,352	29,550	0	29,550	12.9	29,362	187	0
1090	297,508	40,114	0	40,114	13.5	39,096	1,018	0
1116	311,733	42,319	0	42,319	13.6	36,658	5,661	0
1110	296,245	39,918	0	39,918	13.5	36,217	3,701	0
1155	156,813	18,306	0	18,306	11.7	18,829	-523	0
1160	146,985	16,783	0	16,783	11.4	16,010	773	0
1165	131,500	14,383	0	14,383	10.9	12,427	1,956	0
1060	416,849	58,612	0	58,612	14.1	50,313	8,299	0
1180	138,275	15,433	0	15,433	11.2	15,750	-317	0
1185	244,367	31,877	0	31,877	13.0	35,024	-3,147	0
TOTALS:	3,498,260	458,230	0	458,230	13.1	428,449	29,782	0

SOUTH SHORE

M? CHURCH

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4080	14,409	0	0	0	0.0	12,852	-12,852	0
4090	332,118	45,478	0	45,478	13.7	51,021	-5,543	0
4095	301,863	40,789	0	40,789	13.5	42,284	-1,495	0
4100	148,837	17,070	5,000	12,070	8.1	19,829	-7,759	5,000
4105	509,049	72,903	0	72,903	14.3	73,322	-420	0
4110	83,875	7,001	0	7,001	8.3	6,713	288	0
4120	167,553	19,971	0	19,971	11.9	21,413	-1,442	0
4125	129,391	14,056	0	14,056	10.9	11,804	2,252	0
4135	150,331	17,301	5,000	12,301	8.2	17,778	-5,477	0
4140	166,435	19,797	0	19,797	11.9	19,818	-20	0
4145	90,582	8,040	0	8,040	8.9	9,005	-965	1,653
4150	81,275	6,598	0	6,598	8.1	5,048	1,550	0
4155	237,054	30,743	0	30,743	13.0	32,002	-1,259	0
4165	131,473	14,378	0	14,378	10.9	15,381	-1,002	0
5130	86,818	7,457	0	7,457	8.6	7,528	-72	0
	TOTALS:	2,631,063	10,000	311,581	11.8	345,798	-34,216	6,653

TAUNTON RIVER

M? CHURCH

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	ASSESSMENT	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
5005	79,320	6,295	1,448	4,847	6.1	5,559	-712	1,278
5135	94,485	8,645	0	8,645	9.1	19,173	-10,528	10,466
5010	93,608	8,509	0	8,509	9.1	8,641	-132	0
5060	156,322	18,230	0	18,230	11.7	20,803	-2,573	6,000
3070	102,267	9,851	0	9,851	9.6	12,277	-2,426	0
5075	135,883	15,062	0	15,062	11.1	21,548	-6,486	0
5095	156,322	18,230	0	18,230	11.7	24,449	-6,219	0
5125	329,169	45,021	0	45,021	13.7	30,761	14,260	0
3175	141,333	15,907	0	15,907	11.3	20,221	-4,314	0
	TOTALS:	1,288,709	1,448	144,302	11.2	163,432	-19,130	17,744

DIOCESAN TOTALS: 39,024,135 5,139,654 75,000 5,083,633 -18,980 81,830

Projected Revenue for 2017

Assessments and Adjustments and Reserves

The 2017 assessment formula, approved by Diocesan Council, remains unchanged from 2010:

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

where the BASE for 2017 is equal to line 14 (“all other operating expenses”) from the 2014 parochial report, less line 7 (“assistance from diocese”).

For a mission, the 2017 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 2014 generates a gross assessment for 2017 of \$5,139,654. Again this year Diocesan Council created an Assessment Coordinating Committee, whose adjustments to the assessments of 16 congregations totaled \$75,000, as follows:

- Church of Our Saviour, Arlington: \$2,172
- St. John’s Church, Arlington: \$3,241*
- All Saints’ Church, Attleboro: \$1,448**
- St. Andrew’s Church, Hanover: \$5,000*
- St. Paul’s Church, Hopkinton: \$1,521**
- Church of Our Redeemer, Lexington: \$4,392*
- St. Anne’s Church, Lowell: \$5,000**
- St. Paul’s Church, Lynnfield: \$4,720
- St. Paul’s Church, Malden: \$4,000**
- St. Paul’s Church, Newburyport: \$6,324
- St. Peter’s Church, Osterville: \$6,700
- Christ Church, Quincy: \$5,000
- St. John’s Church, Saugus: \$6,000
- Church of Our Saviour, Somerset: \$4,482*
- Church of the Epiphany, Walpole: \$7,000*
- Church of the Good Shepherd, Wareham: \$8,000*

** indicates second year / ** indicates third year*

The total value of assessments to be billed in 2017 is \$5,064,654, and our reserve for uncollected assessments is \$20,000. In addition to the assessments, revenue also reflects \$50,000 in projected voluntary contributions from two congregations not subject to the assessment and an estimated \$8,000 in collections at the bishops’ visitations.

Net Revenue from Investments

Core budget revenue amounting to 26.8% comes in the form of spending policy draws from investments, either owned directly by the diocese (including our endowment funds), or owned by others (usually the Trustees of Donations) in trust for the benefit of the diocese. Some funds, whether owned by the diocese or by a trust, place no restriction on the diocese regarding the use of the income provided through the spending policy draws. The unrestricted funds represent about 25% 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 54 lists the trusts owned and managed by the Trustees of Donations (TOD) for the benefit of the diocese. In 2017 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 2013 through June 2016.

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 2017.

The total spending policy income available in 2017 (\$867,489) is a small increase from 2016 (\$818,465), due to market appreciation.

Spending Policy – Endowments (Agency Funds)

The appendix table on page 53 lists the endowments owned by the diocese and managed primarily by the TOD. 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 fund was created or stipulated by Diocesan Council. Pages 48-52 offer more historical detail about these funds.

The proposed spending policy for 2017 is similar to that used by the TOD: to draw 4% of a base that reflects the average of the market value over the past 12 quarters, adjusted for withdrawals from and additions to principal.

The total spending policy income available to the 2017 core budget is \$1,033,809, which is \$29,991 more than in 2016. The increase reflects net additions to the endowment during 2016 as well as market appreciation.

Spending Policy and Core Revenue

Over the summer of 2015, the Financial Advisory Committee affirmed its support of a 4% spending draw from diocesan endowment funds to support the core budget. The value of each fund for the purpose of calculating the draw is based on a trailing 12-quarter average of end-of-month market value, adjusted for additions and withdrawals. This policy will continue in 2017.

At the same time, Diocesan Council has unrestricted access to several funds in the endowment; both principal and income can be spent as long as Council approves. Such draws above and beyond the normal 4% draw are treated as supplemental, not core, revenue, thus flagging them as special actions in response to special circumstances.

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. To that end, Council formally established and seeded three reserves (see page 49), one for future episcopal elections (cost center 4023), one for major purchases (cost center 5142) and one for capital improvements (cost center 5141). These are in addition to the longtime reserve for General Convention expenses (cost center 4411). The 2017 core budget provides continued funding for each of these four reserves.

Dividend and Interest Income

The estimate for 2017 dividend income is \$78,000. Of this, \$42,400 is from a gift of stock received more than 40 years ago, with the request that it not be sold. The other sources of income recorded here are three trusts not held by the Trustees of Donations, an illiquid investment from a closed parish and dividend income on diocesan cash and bond mutual funds. The interest income, estimated at \$8,000, is primarily from clergy loans.

The diocesan portfolio also includes loans to congregations (separate from those made through the Stokes Fund loan program). The current status of the parish loans discussed in last year's budget book is:

- St. Elizabeth's Church, Wilmington (outstanding amount: \$4,803): The congregation is behind several years in payments and has agreed to a new repayment plan.
- Grace Church, North Attleborough (outstanding amount: \$57,091): The congregation entered into an agreement with Diocesan Council in 2012 which involves certain financial and operational incentives in order for the parish to achieve certain milestones. In 2014 the longtime rector retired, and the parish requested a reduction in its payment plan during the interim. Council agreed to do so for 2014 and 2015. Under the revised plan, Grace Church made payments of \$120,271 and earned debt forgiveness of \$43,138 in 2014. Council will be presented a revised plan from the congregation to continue its debt reduction.

Supplemental Budget Revenue

The supplemental budget table shows eight sources of revenue:

1. Grants from Bishop's Directed Funds (BDF's, formerly known as Bishop's Discretionary Funds), restricted and unrestricted: 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. Of the many funds owned by the Trustees of Donations, 34 funds (listed on page 55) with a market value of about \$18.1 million are for the benefit of the diocesan bishop, and the Trustees of Donations provide him with an annual spending policy from these trusts. The generosity of past donors and the diocesan bishop makes it possible to fund new ventures in mission and strategic ministries through the supplemental budget.

In 2017, Bishop Gates will continue the practice of using the bulk of the BDF income to support pilot programs and new initiatives, to fund the Office of Development and to supplement strategic ministries. The 2017 draw is set at \$694,445. If the Annual Fund comes in above \$328,781, then the grants from the BDF's will be reduced.

2. The Annual Fund: The 2017 Annual Fund goal is set at \$328,781 to cover various strategic ministries. With \$30,000 needed to cover the direct costs of the Annual Fund, \$298,781 is likely to be available for Annual Fund grants in 2017.

3. Contributions: Fundraising by the Chinese Ministry, Life Together and Jubilee Global Ministries. In 2017 the budget amounts to \$146,784.

4. Grants: These total \$106,333. The largest grant recorded here is \$95,000, a continuation of the grant from Episcopal City Mission to the Life Together program. Projected grants from external foundations total \$11,333.

5. Proceeds from closed parishes: The Closed Parish Net Proceeds Fund will be re-funded by the closing and sale of the Church of the Holy Spirit in Wayland. A final accounting will be completed once the rectory is sold and costs related to the closing are determined. See pages 41-43 for more information.

6. In-kind: This line reflects Life Together's use of the diocesan property at 40 Prescott Street, Brookline for offices and fellow housing, valued at \$65,000 (see page 28).

7. Transfers: Funds transferred between core and supplemental budgets and other sources. The largest transfer is the \$200,000 internal grant from the General Endowment Fund to the Together Now campaign.

8. Fee Revenue: Received for Life Together site placements, consulting and rental fees, and for Chinese Ministry programs.

The Structure of Diocesan Operations

The structure for diocesan operations is designed to encourage accountability, clarity and collaboration with five functional areas and diocesan leadership. The bishop, bishop suffragan and the canon to the ordinary are responsible for the management of diocesan operations and the controls on the operations that are implemented through the five functional areas. The treasurer ensures that financial records are reflective of the full resources applied to each individual component of mission strategy fulfillment. In 2016 the staff's reporting matrix and budget allocations were changed to better reflect the operational process of the diocese.

The **Deaneries, Congregations and Clergy** area houses the congregational development team working, along with others from around the diocese, the province and the wider church, across areas to promote clergy wellness and congregational vitality and viability.

The **Congregational Resources and Training** area includes grant programs, events, training and communications.

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 Office of Development helped to raise \$20 million for the Together Now campaign. (See page 44 for more campaign information.) The two bishops assisted by the canon to the ordinary have oversight responsibilities for all diocesan operations, in conjunction with staff who have specific functional responsibilities.

In the **Administrative Services** area, the Treasurer's Office oversees financial services, human resources and information technology.

Projected Expenses for 2017 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: 2017 proposed budget with the 2016 budget (top) and the 2015 actuals (bottom) for comparison. Each row represents a specific cost center code and description within the area. The first row in each area is staff compensation. There are five columns of figures that include a variety of budgeted and actual expenses and revenue offsets:

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. Salary and benefits for diocesan staff reflect a 2% increase and an estimated 8% increase in the cost of health care coverage for 2017.

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

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

The total 2017 budget for this area is \$918,094, with \$824,843 in the core budget and \$93,251 in the supplemental budget. The 2016 core and supplemental budget total was \$1,089,128. Specific amounts in this area have been reallocated at the request of staff who oversee the budget.

• Deaneries, Congregations and Clergy: 1000 - Core

This line contains the total compensation costs for seven of eight staff members listed on page 59. Two are part time. The mission hubs program director is paid from Together Now campaign funds.

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

An amount of \$400 per deanery to support deanery assembly activities; \$4,000 per deanery to offset deans' time and expense; and \$12,000 to provide hospitality for Confirmations.

• Congregations: 1101 - Core & Supplemental

The \$12,000 in the core budget funds the priests-in-charge consultants program. In the supplemental budget there is a total of \$20,000 for mentoring of newly ordained clergy from the Bishop's Directed Funds.

• Transition Ministries: 1111 - Core

Level funded at \$10,000, for supporting expenses for the Office of Transition Ministries.

• Clergy: 1201 - Core

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

• Sabbaticals: 1211 - Core & Supplemental

The funds totaling \$26,555 for clergy sabbaticals come from two sources: an agency endowment fund in honor of Bishop Norman Nash (\$9,055) and a Bishop's Directed Funds grant (\$17,500).

• Continuing Education: 1212 - Supplemental

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

• MSASA EDS: 1213 - Core

Spending policy income of \$11,418 is available for a scholarship program for students from Africa attending Episcopal Divinity School.

• Clergy Dependent Scholarships: 1221 - Supplemental

An amount of \$33,337 from the Bishop's Directed Funds.

• Dill Campership: 1223 - Supplemental

The spending policy income of \$3,359 is from a restricted bishop's directed fund to support a scholarship to Camp O-At-Ka in Maine.

• Support for Retired Clergy: 1231 - Core & Supplemental

The Society for the Relief of Aged or Disabled Episcopal Clergy and the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Episcopal Church both receive distributions from agency funds as well as from trust funds where the organizations are named as income beneficiaries. These distributions help retired clergy and widows, widowers and orphans of clergy. The books and records of these two organizations, because they are separate 501(c)(3)

organizations, are not part of the diocesan budget. Because retired clergy and their families are living longer, the funds from the agency and trust funds need funding support. The 2017 budget allocates \$37,000, \$5,300 for program and support expenses, including gatherings, and \$31,700 for additional grants. The BDF provides \$5,500 of this funding.

- Commission on Ministry: 1311 - Core

The net cost for this program is budgeted at \$68,012, including \$10,000 for the Commission on Ministry's priority to fund seminarians whose first language is not English. The credit of \$7,000 is for fees paid by those in the ordination process, such as those for the Oxford Document background checks.

- Seminarians: 1312 - Core & Supplemental

Scholarships for seminarians in the ordination process. The amount of \$63,363 is the spending policy income from an agency endowment fund for this purpose.

- Fresh Start/New Call: 1321 - Core

A total of \$16,666—\$8,333 to be matched by a grant from the Lilly Endowments Pastoral Excellence Network—for curriculum revision and leader training. This is the second year of a three-year matching grant.

- Diaconate Program: 1331 - Core

Net, after fees, of \$20,000, based on the projected participation, and includes the expenses of two archdeacons.

- Clergy Family Network: 1341 - Core

An amount of \$1,000, based on 2016 actuals.

- Pre-Lenten Retreat: 1411 - Core

Net costs to the core budget, after fees are budgeted at \$3,000, based on 2016 actuals.

- Clergy Conference: 1421 - Core

This three-day event is budgeted at \$105,000, of which \$60,000 is covered by attendee fees. The balance, \$45,000, is covered by the core budget.

- Clergy Day: 1431 - Core

Clergy Day is budgeted at \$3,000, of which \$2,000 is covered by fees, leaving a core budget balance of \$1,000.

Deaneries, Congregations & Clergy Core									
2017 Budget 2016 Budget and 2015 Actual									
2017 Budget									
2017 and 2016 Budget	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Transfers	Total	2016 Budget	
CC1000 DC & C	-	477,362	-	-	-	-	477,362	650,639	
CC1001 Deaneries	-	-	4,800	-	-	-	4,800	4,800	
CC1002 Deans	48,000	-	-	-	-	-	48,000	48,000	
CC1003 Deanery Confirmations	12,000	-	-	-	-	-	12,000	12,000	
CC1101 Congregations	4,000	8,000	-	-	-	-	12,000	12,000	
CC1111 Transition Ministries	-	-	10,000	-	-	-	10,000	10,000	
CC1201 Clergy	-	-	-	2,000	(2,000)	-	-	-	
CC1211 Sabbaticals	-	-	-	-	-	9,055	9,055	8,821	
CC1213 MSASA EDS	11,418	-	-	-	-	-	11,418	11,118	
CC1231 Support for Retired Clergy	37,000	-	-	-	-	(5,500)	31,500	31,500	
CC1311 Commission on Ministry	36,000	21,012	18,000	-	(7,000)	-	68,012	68,012	
CC1312 Seminars	63,363	-	-	-	-	-	63,363	61,983	
CC1321 Fresh Start / New Call	-	-	16,666	-	-	(8,333)	8,333	8,333	
CC1331 Diaconate Program	-	9,000	10,000	3,000	(2,000)	-	20,000	20,000	
CC1341 Clergy Family Network	1,000	-	-	-	-	(1,000)	-	-	
CC1411 Pre Lenten Retreat	-	-	4,600	1,800	(3,400)	-	3,000	3,000	
CC1421 Clergy Conference	-	2,000	103,000	-	(60,000)	-	45,000	45,000	
CC1431 Clergy Day	3,000	-	-	-	(2,000)	-	1,000	1,000	
Totals	215,781	517,374	167,066	6,800	(76,400)	(5,778)	824,843	996,206	
2015 Actual									
2015 Actual	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Transfers	Total		
CC1000 DC & C	-	564,550	-	-	-	-	564,550		
CC1001 Deaneries	-	-	4,049	-	-	-	4,049		
CC1002 Deans	48,000	-	267	-	-	-	48,267		
CC1003 Deanery Confirmations	750	1,800	12,436	-	-	-	14,986		
CC1101 Congregations	15,354	2,000	3,043	-	(314)	-	20,083		
CC1111 Transition Ministries	-	990	10,138	-	(3,900)	-	7,228		
CC1201 Clergy	-	-	-	3,695	(330)	-	3,365		
CC1211 Sabbaticals	15,797	-	572	-	-	8,203	24,572		
CC1212 Continuing Education	5,146	-	-	-	-	-	5,146		
CC1221 Clergy Dependent Scholarships	37,500	-	-	-	(100)	-	37,400		
CC1231 Support for Retired Clergy	-	-	11,796	-	-	(5,300)	6,496		
CC1311 Commission on Ministry	23,763	28,806	25,314	3,480	(11,205)	-	70,158		
CC1312 Seminars	64,112	-	-	-	(11,398)	(7,612)	45,102		
CC1321 Fresh Start Program	950	375	4,157	-	(25,000)	-	(19,518)		
CC1331 Diaconate Program	278	10,288	27,075	-	(530)	-	37,111		
CC1341 Clergy Family Network	1,812	-	-	195	-	(1,000)	1,007		
CC1411 Pre Lenten Retreat	15	2,000	6,585	73	(4,900)	-	3,773		
CC1421 Clergy Conference	-	2,900	120,810	701	(68,525)	-	55,886		
CC1431 Clergy Day	-	-	3,571	86	(3,510)	-	147		
Totals	213,477	613,709	229,813	8,230	(129,712)	(5,709)	929,808		

**Deaneries, Congregations & Clergy - Supplemental
2017 Budget, 2016 Budget and 2015 Actual**

		2017 Budget				2016 Budget	
	Program Expenses	Revenue Offset	Transfers	Grant	BDF Grants	Net Cost	2016 Budget
CC1101 Congregations - Making Excellent Disciples	20,000	-	-	-	(20,000)	-	20,000
CC1211 Sabbaticals	26,555	-	(9,055)	-	(17,500)	-	26,321
CC1212 Continuing Education	10,000	-	-	-	(10,000)	-	10,000
CC1221 Clergy Dependent Scholarships	33,337	-	-	-	(33,337)	-	33,337
CC1223 Dill Campership	3,359	-	-	-	(3,359)	-	3,264
CC1231 Support for Retired Clergy	-	-	5,500	-	(5,500)	-	-
CC1321 Fresh Start/New Call	-	-	(8,333)	8,333	-	-	-
CC1341 Clergy Family Network	-	-	1,000	-	(1,000)	-	-
Totals	93,251	-	(10,888)	8,333	(90,696)	-	92,922
		2015 Actual					
	Program Expenses	Revenue Offset	Transfers	Lilly Grant	BDF Grants	Net Cost	
CC1101 Congregations - Making Excellent Disciples	25,000	-	-	(25,000)	-	-	
CC1211 Sabbaticals	24,572	-	(8,203)	-	(17,500)	(1,131)	
CC1212 Continuing Education	5,146	-	-	-	(10,000)	(4,854)	
CC1221 Clergy Dependent Scholarships	34,484	-	-	-	(34,244)	240	
CC1223 Dill Campership	3,016	(3,016)	-	-	-	-	
CC1231 Support for Retired Clergy	-	-	5,300	-	-	5,300	
CC1311 Commission on Ministry	-	-	-	-	(10,020)	(10,020)	
CC1312 Seminars	-	-	7,612	-	-	7,612	
CC1341 Clergy Family Network	-	-	1,000	-	-	1,000	
CC1421 Clergy Conference	-	-	-	-	-	-	
Totals	92,218	(3,016)	5,709	(25,000)	(71,764)	(1,853)	

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

The total 2017 budget for this area is \$1,243,029, with \$1,203,029 in the core budget and \$40,000 in the supplemental budget. This area was budgeted \$1,245,089 in 2016.

• Congregational Resources and Training: 2000 - Core

The total compensation and benefits costs for staff members in this area are \$493,014 (see roster on pages 59-60). Between the Together Now campaign and the Congregational Resources and Training core budget, approximately \$880,000 per year is granted to congregations and clergy. (See page 56.)

• Coburn Fund: 2001 - Core

The Coburn Fund is a fund established in memory of Bishop John B. Coburn to be used for theological education within the diocese.

• Congregational Development Grants: 2011, 2012 - Core

The two congregational development grant programs have been level funded: \$60,000 for the targeted grants and \$150,000 for the open grants.

• Bristol County Case Grants: 2013 - Core

The draw for this grant program is \$135,162. 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 - Core & Supplemental

This cost center contains specific grants to congregations funded by agency or trust endowments or supplemental sources. In the core budget, agency endowments support grants to St. John's, Sharon (\$21,742), Christ Church, Plymouth (\$3,213) and Emmanuel Church, West Roxbury (\$3,972). A trust fund provides a grant to Emmanuel Church, Boston (\$7,647). In the supplemental budget, \$10,000 is allotted to St. Stephen's Church, Lynn for its KIDS in Community summer program and \$25,000 to Grace Church, Everett.

• 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 draw from the remainder of the diocesan agency fund (7004H) that in previous years supported the St. Andrew's of the Deaf congregation in Natick, which closed in 2011. It is level funded at \$8,000. 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, which require a match from grant recipients and are open to any outreach activity, and \$2,733 for House of Mercy grants, which require a focus on women and children in need (no match necessary). The funding sources for the House of Mercy grants are agency endowment 7002W and trust endowment 7001W.

• Hispanic Ministries: 2031 - Core

The 2017 budget for this grant program to support Hispanic ministries in congregations is \$25,000. An additional \$12,279 pays for the Hispanic missionary.

- **Green Grants and Loans: 2052 – Together Now Campaign**

The 2016 green grants and loan programs have been funded through the Together Now campaign (see page 44). The year 2016 is the final year of grant funding provided by the campaign. The Green Loan fund, along with the Stokes Fund loans, are available for environmentally responsible improvements to church buildings.

- **Spring Learning Event: 2112 - Core**

The core budget for 2017 is \$5,000, with \$1,500 in participant fees, for a net expense of \$3,500.

- **Resource Day: 2113 - Core**

The total cost of Resource Day is \$11,500, \$4,000 of which is offset by fees collected, for a total allocation of \$7,500.

- **CRT Workshops: 2131 - Core**

The total cost of \$9,000 for the various workshops offered throughout the diocese, \$2,000 of which is offset by fees collected.

- **Antiracism: 2132 - Core**

The \$3,000 in this cost center reflects a focus on antiracism activities; \$700 is offset by fees.

- **Safe Church: 2133 - Core**

A net of \$4,000 for trainings, online and in person—\$7,000 in total cost, \$3,000 is offset by fees.

- **Resource Center: 2151 - Core**

The amount of \$500 stocks and renews the materials in the Resource Center staffed by the missionary for Christian education, formation and discipleship.

- **Consultants and Coaches: 2161 - Core**

The amount of \$18,000 for congregational consultants and coaches and their compensation (\$8,000) and expenses (\$10,000). Congregational Consultants help with best practices in many areas, including finances, buildings, leadership and stewardship.

- **Congregational Support: 2211 - Core**

Much of this total of \$9,000 is legal fees on various parish-related issues throughout the year.

- **Program Support: 2221 - Core**

The amount of \$36,300 covers various workshop and training programs as well as a grant of \$30,000 to the Leadership Development Initiative, of which \$5,000 is funded from the BDF. An amount of \$2,000 is collected in fees.

- **Family Camp: 2222 - Core**

Family Camp is essentially a break-even operation.

- **Committee Support: 2231 - Core**

An amount of \$10,000 to provide hospitality and support for diocesan committees and continuing education for departmental staff.

- **Communications: 2311, 2312 - Core**

The total budget is level funded at \$52,000.

Strategic Ministries (see tables on pages 32 and 33)

The total 2017 budget for this area is \$2,751,876, with \$1,275,792 in the core budget and \$1,476,084 in the supplemental budget. The 2016 core and supplemental budget total was \$2,794,382.

• Strategic Ministries: 3000

Compensation in this area is allocated to the specific cost centers. The half-time project director of global mission is funded from the Together Now campaign mission tithe (two-thirds) and Jubilee Ministry (one-third), cost center 3511.

• Youth Ministry: 3011, 3012 - Core

The core budget for the diocesan youth ministry includes the compensation and benefits for the director of youth ministry and a part-time administrator along with \$80,000 for program and operational services. Fees collected are \$35,000. The Youth Leadership Academy is budgeted at \$53,000; \$40,000 is collected in fees.

• Life Together: 3056 - Core & Supplemental

Life Together is a year-long residential Christian formation program for young adults between the ages of 21 and 32. During their fellowship year, all Life Together fellows:

- Work for social justice in schools, nonprofit organizations and Episcopal churches across the diocese
- Pursue their own formation through a rigorous Christian formation curriculum centered around prayer, spiritual practice, skill-based leadership training and community building
- Live in intentional community with one another.

Eighty percent of alumni serve in some capacity in their churches and communities. Thirty percent of Life Together fellows continue on to ordination in the Episcopal Church and other Christian denominations. Ten alumni are currently discerning ordination in the Diocese of Massachusetts.

In the 2016-2017 program year, Life Together will host 26 young adults in five intentional communities across eastern Massachusetts:

- Micah Fellows are first-year fellows based in the greater-Boston area.
- Emmaus Fellows, second-year fellows based in the greater-Boston area, focus on deepening the capacity of site partners and the individual formation of the fellows.
- Esperanza Academy Teaching Fellows—This is a partnership between Life Together and Esperanza Academy, 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 fellows live in Fall River and work at nonprofit organizations and churches in the greater Fall River and New Bedford communities.

Funding: Over the past five years, Life Together has built strong partnerships to secure substantial outside funding, resulting in a diverse and balanced funding structure. Including in-kind estimates, the total budget for the coming year is \$709,000. The plan for securing the needed revenue is:

- Site fees of \$256,000 (an average of \$11,682 per intern)
- External grants totaling \$95,000

- Annual fundraising campaign and event led by staff and fellows to net \$65,000
- Consulting fees totaling \$5,000
- Core budget contribution of \$75,000
- Supplemental budget contribution of \$148,000
- In-kind housing worth \$65,000 for office space and intentional community housing.

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:

Five deaneries across the diocese host intentional communities of Life Together fellows. In the 2016-2017 program year, two intentional communities will continue to be housed in diocesan properties (40 Prescott Street in Brookline and 7 St. Luke's Road in Allston). 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 program, this budget includes the in-kind value of housing provided this year by diocesan property.

Life Together is continuing a partnership with the Episcopal Chaplaincy at Harvard University where seven first-year Micah Fellows will live this fall. Additionally, Life Together Emmaus Fellows live at the St. Luke's Road property in Allston.

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

• MIT Campus Ministry: 3111 - Core & Supplemental

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$124,227) plus program expenses of \$7,000. The ministry may raise additional funds through the MIT development office. In addition to two agency endowment funds that support campus ministry in general, an additional agency fund and a bishop's directed fund provide support for the MIT ministry.

• 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 (\$49,278) plus program expenses of \$7,000.

• Boston College-Northeastern University Campus Ministries: 3131, 3136, 3141 - Core

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 (\$115,058). Each of these campus ministry programs is allotted \$7,250 for program support.

• Tufts University Ministry: 3171 - Core

An amount of \$14,000 supplements the compensation for the Protestant chaplain, an Episcopalian, at Tufts.

• Grace Chapel, Brockton: 3221 – Supplemental

A congregation, Grace Chapel, worships and has office space in the First Lutheran Church in Brockton. Proceeds from the sale of the former St. Paul's Church and condo in Brockton are used, by vote of Diocesan Council, to pay the full-time compensation for Grace Chapel's priest and two part-time lay employee salaries (\$114,006). Bishop Gates, staff and Diocesan Council continue to discern what shape the ministry in Brockton is taking.

- **Continuing Grants for Congregations: 3231, 3241, 3251 - Core**
Level funding is provided in the 2017 budget for grants directly to congregations to help pay their clergy, as follows: St. Luke's-San Lucas, Chelsea, \$66,000; and Christ Church/Iglesia de San Juan, Hyde Park, \$44,000; and for the compensation and benefits paid directly to the vicar at St. Stephen's Church, Boston (\$138,898).

- **Cantonese Congregations: 3311, 3321 - Core & Supplemental**
The core budget provides the full compensation and benefits for the canon for Asiamerican ministries in cost center 3311 (\$93,328). The two Cantonese congregations raise additional funds for their ministries through contributions and grants (projected at \$60,000). 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 - Supplemental**
The amount of \$50,000 to support part of a full-time clergy salary from the Bishop's Directed Funds.

- **San Pedro/St. Peter's, Salem: 3341 - Core**
The \$65,000 grant in the 2017 core budget will help the San Pedro/St. Peter's 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 \$60,000 grant in the 2017 core budget supports part of the salary of a Hispanic priest who ministers to all members of the congregation. Grace has been asked to develop a strategic plan.

- **Church of the Good Shepherd, Watertown: 3361 - Supplemental**
With funds from proceeds from the sale of closed churches, the Church of the Good Shepherd has developed a long-range plan and a model for church restarts. Funding from closed church proceeds is no longer available, so a grant of \$30,000 to support part of a clergy salary is funded in the supplemental budget by the Bishop's Directed Funds, which is \$15,000 less than in 2016.

- **Dartmouth, St. Peter's—The Bridge: 3371 - Supplemental**
Support for a new initiative of St. Peter's Church in Dartmouth to provide mental health outpatient support services to the greater New Bedford area. The Bridge is housed at St. Peter's, staffed by professionals, serving a vital need in the community, and funded through diocesan support and independent fundraising. The \$45,000 here is for additional start-up costs to be repaid over time to the Bishop's Directed Funds. In addition, the Bishop's Directed Funds will lend St. Peter's up to \$30,000 from a fund dedicated to making loans to parishes. The business plan indicates self-sufficiency, with the ability to make payments on the loan by year three.

- **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. In 2017 the core budget will fund one full-time resident. A quarter-time resident will be funded through the supplemental budget from Annual Fund contributions.

- African Ministries: 3431 - Core

The budget for grants to African congregations is level funded at \$25,000 in 2017.

- Jubilee Ministry: 3511 - Core & Supplemental

The core budget shows funding for the Jubilee Ministry, set at \$45,000. In addition, there is approximately \$63,000 available from prior years' fundraising, of which \$30,784 is budgeted for 2017. An additional \$3,575 for Jubilee Ministry is funded through the BDF. Jubilee oversees global mission partnerships.

- Middle East Network Committee: 3531 - Core

Trips led by Bishop Gayle Harris to Palestine and Israel break even (\$40,000). An additional \$1,000 funds the expenses of the committee.

- 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 2017 the program is budgeted a diocesan contribution of \$250,000 from the supplemental budget, of which \$125,000 will be funded through the Annual Fund and \$125,000 funded through grants from the Bishop's Directed Funds.

- B-PEACE for Jorge: 3545 – Supplemental

Established by Diocesan Convention in 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 \$50,000 from the Annual Fund and other contributions. The campaign has narrowed its focus to youth jobs and gun law reform. 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

An amount of \$6,000 to support the travel costs of the deacon for mission.

- The Cathedral: The Crossing; and Cathedral Ministry with the Homeless: 3911 - Supplemental

A \$77,000 grant is budgeted from the supplemental budget to support the work of The Crossing, the emergent church congregation at the Cathedral Church of St. Paul, and to support work with MANNA and 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

A \$1,956 grant will be given out of an agency endowment 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 \$1,748 supports the Native American Lillian Vallely School in Idaho.

Strategic Ministries - Core									
2017 Budget, 2016 Budget and 2015 Actual									
2017 Budget	Program Expenses	Compensation & Benefits	2017 Budget			Revenue Offset	Transfers	Total	2016 Budget
			Operational & Support Svcs	Mgt and Prof Svcs					
CC3011 Youth Ministry	62,500	162,662	17,500	-	(35,000)	-	207,662	179,819	
CC3012 Youth Leadership Academy	41,000	6,000	6,000	-	(40,000)	-	13,000	13,000	
CC3056 Life Together	-	-	-	-	-	75,000	75,000	75,000	
CC3111 MIT Ministry	7,000	124,227	-	-	-	(3,363)	127,864	125,979	
CC3121 Boston University	7,000	49,278	-	-	-	-	56,278	64,138	
CC3131 Boston College	7,250	-	-	-	-	(250)	7,000	7,000	
CC3136 BC/NU Combined	-	115,058	-	-	-	(250)	115,058	113,157	
CC3141 Northeastern	7,250	-	-	-	-	-	7,000	7,000	
CC3171 Tufts University Ministry	14,000	-	-	-	-	-	14,000	14,000	
CC3231 Chelsea, St. Luke's/ San Lucas	66,000	-	-	-	-	-	66,000	66,000	
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	-	-	44,000	44,000	
CC3251 South End, St. Stephen's	-	138,898	-	-	-	-	138,898	136,707	
CC3311 Boston Chinese Ministries	-	93,328	-	-	-	-	93,328	91,695	
CC3341 Salem, San Pedro	65,000	-	-	-	-	-	65,000	65,000	
CC3351 Lawrence, Grace Church	60,000	-	-	-	-	-	60,000	60,000	
CC3411 Urban Residents	75,000	-	-	-	-	-	75,000	75,000	
CC3431 African Ministries	25,000	-	-	-	-	-	25,000	25,000	
CC3511 Jubilee Global Mission	-	-	-	-	-	45,000	45,000	45,000	
CC3531 Middle East Network Committee	-	-	41,000	-	(40,000)	-	1,000	1,000	
CC3551 Mission Through Partnerships	6,000	-	-	-	-	-	6,000	6,000	
CC3921 Barbara C. Harris Center	1,956	-	-	-	-	-	1,956	1,909	
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000	30,000	
CC3952 UTO/ American Indians /CHS	1,748	-	-	-	-	-	1,748	1,703	
Totals	520,704	689,451	64,500	-	(115,000)	116,137	1,275,792	1,248,108	
2015 Actual									
CC3011 Youth Ministry	51,197	116,721	3,047	373	(32,980)	-	138,358		
CC3012 Youth Leadership Academy	31,801	2,000	1,756	-	(37,390)	-	(1,833)		
CC3056 Life Together	-	-	-	-	-	81,618	81,618		
CC3111 MIT Ministry	1,045	134,045	1,024	3,108	-	-	139,222		
CC3121 Boston University	149	49,029	3,704	-	-	-	52,882		
CC3136 BC/NU Combined	7,521	116,016	3,805	-	-	-	127,342		
CC3141 Northeastern	-	3,076	-	-	-	-	3,076		
CC3171 Tufts University Ministry	8,000	-	-	-	-	-	8,000		
CC3231 Chelsea, St. Luke's/ San Lucas	66,000	-	-	-	-	-	66,000		
CC3241 Hyde Park, Christ Church/San Juan	44,448	-	-	-	-	-	44,448		
CC3251 South End, St. Stephen's	-	133,686	-	-	-	-	133,686		
CC3311 Boston Cantonese Ministries	-	79,906	-	-	-	-	79,906		
CC3321 Quincy Cantonese Ministries	-	-	99	-	-	-	99		
CC3331 Dorchester, St. Mary's	-	-	-	-	-	-	-		
CC3341 Salem, San Pedro	70,000	-	-	-	-	-	70,000		
CC3351 Lawrence, Grace Church	65,000	-	-	-	-	-	65,000		
CC3411 Urban Residents	75,000	-	-	-	-	-	75,000		
CC3431 African Ministries	15,082	-	275	-	-	-	15,357		
CC3511 Jubilee Global Mission	-	-	(4,345)	-	-	45,000	40,655		
CC3531 Committee on Palestine & Israel	-	-	103,220	-	(104,563)	-	(1,343)		
CC3551 Mission Through Partnerships	-	-	7,957	-	-	-	7,957		
CC3921 Barbara C. Harris Center	-	-	367	-	-	-	367		
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000		
CC3952 UTO/ American Indians /CHS	1,583	-	-	-	-	-	1,583		
Totals	466,826	634,479	120,909	3,481	(174,933)	126,618	1,177,380		

Strategic Ministries - Supplemental											
2017 Budget, 2016 Budget and 2015 Actual											
	2017 Budget										
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Cost	Transfers	Revenue Offset	Annual Fund	Use of Proceeds	BDF Grants	Net Cost
2017 Budget											2016 Budget
CC3056 Life Together	55,700	476,362	144,000	32,938	709,000	(75,000)	(486,000)	(102,062)	-	(45,938)	781,000
CC3111 MIT	-	-	-	-	-	3,363	-	-	-	(3,363)	-
CC3131 Boston College	-	-	-	-	-	250	-	(250)	-	-	-
CC3141 Northeastern	-	-	-	-	-	250	-	(250)	-	-	-
CC3221 Brockton, Grace Chapel	-	114,006	-	-	114,006	-	-	-	(114,006)	-	111,771
CC3311 Boston Chinese Congregation	25,000	25,000	-	-	50,000	-	(50,000)	-	-	-	50,000
CC3321 Quincy Chinese Congregation	10,000	-	-	-	10,000	-	(10,000)	-	-	-	10,000
CC3331 Dorchester, St. Mary's	50,000	-	-	-	50,000	-	-	-	-	(50,000)	50,000
CC3361 Watertown, Good Shepherd	30,000	-	-	-	30,000	-	-	-	-	(30,000)	45,000
CC3371 So. Dartmouth, St. Peter's The Bridge	45,000	-	-	-	45,000	-	-	-	-	(45,000)	65,000
CC3411 Urban Residents	11,719	-	-	-	11,719	-	-	(11,719)	-	-	11,719
CC3511 Jubilee Global Mission	46,950	27,409	5,000	-	79,359	(45,000)	(30,784)	-	-	(3,575)	75,784
CC3541 B-SAFE	250,000	-	-	-	250,000	-	-	(125,000)	-	(125,000)	225,000
CC3545 B-PEACE	50,000	-	-	-	50,000	-	-	(50,000)	-	-	50,000
CC3911 Cathedral Church of St Paul	77,000	-	-	-	77,000	-	-	-	-	(77,000)	71,000
Totals	651,369	642,777	149,000	32,938	1,476,084	(116,137)	(576,784)	(289,281)	(114,006)	(379,876)	1,546,274
	2015 Actual										
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Cost	Transfers	Revenue Offset	Annual Fund	Use of Proceeds	BDF Grants	Net Cost
2015 Actual											
CC3056 Life Together	6,580	427,062	289,582	12,534	735,758	(75,000)	(429,989)	(115,000)	-	(34,151)	81,618
CC3221 Brockton, Grace Chapel	-	107,661	-	-	107,661	-	-	-	(107,661)	-	-
CC3231 Chelsea, St. Luke's/San Lucas	37,340	-	-	-	37,340	-	(37,340)	-	-	-	-
CC3251 South End, St. Stephen's	50,000	-	-	-	50,000	-	-	-	-	(50,000)	-
CC3311 Boston Chinese Congregation	9,142	39,420	-	-	48,562	-	(48,562)	-	-	-	-
CC3321 Quincy Chinese Congregation	11,960	-	1,139	-	13,099	-	(13,000)	-	-	-	99
CC3331 Dorchester, St. Mary's	50,000	-	-	-	50,000	-	-	(50,000)	-	-	-
CC3361 Watertown, Good Shepherd	60,000	-	-	-	60,000	-	-	-	(60,000)	-	-
CC3411 Urban Residents	18,750	-	-	-	18,750	-	-	-	-	(18,750)	-
CC3511 Jubilee Global Mission	21,999	13,425	5,227	4	40,655	(45,000)	-	-	-	-	(4,345)
CC3541 B-SAFE	225,000	-	-	-	225,000	-	-	(125,000)	-	(100,000)	-
CC3545 B-PEACE	50,000	-	619	-	50,619	-	(619)	(50,000)	-	-	-
CC3911 Cathedral Church of St Paul	65,000	-	-	-	65,000	-	-	-	-	(65,000)	-
Totals	605,771	587,568	296,567	12,538	1,502,444	(120,000)	(529,510)	(340,000)	(167,661)	(267,901)	77,372

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

The total 2017 budget for this area is \$2,781,133, with \$2,300,394 in the core budget net of off-setting revenue, and \$480,739 in the supplemental budget. The 2016 core and supplemental budget total was \$2,587,354.

- Area Staff and Expenses: 4000 - Core

This line includes compensation for four positions; others are included in individual cost centers. Development staff compensation is in the supplemental budget. (See roster on pages 59-60.)

- Diocesan Leadership: 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. The diocesan bishop's compensation includes Total Clergy Compensation (TCC), including the value of living in diocesan-owned housing. Also see cost center 5125.

- Assisting Bishops: 4021 - Core

Stipends and costs for assisting bishops, as needed (\$25,000).

- New Bishop Transition Reserve: 4023 – Core

In January 2015, Diocesan Council established a long-term fund and seeded it with \$250,000 to pay for the costs associated with discernment, election and transition. Council's goal is to contribute \$50,000 per year out of the core budget. This year's contribution is set at \$30,000, which will be added to the \$250,000 extraordinary allocation that Council voted in January 2015, bringing the total balance in the reserve to \$360,000.

- Chancellor: 4031 - Core

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

- Title IV: 4061 - Core

Canonical clergy disciplinary process, budgeted at \$15,000 for 2017. This includes \$2,000 stipends for two non-staff intake officers.

- Diocesan Leadership Budgeted Reserve: 4099 - Core

The entire budgeted amount of \$197,876 for 2017 represents funding for contingencies, staff sabbatical coverage and potential staff compensation increases based upon changed responsibilities.

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

The 2017 amounts budgeted are \$10,000 for Diocesan Council; \$3,000 for Standing Committee; and \$6,000 for the Diocesan Youth Council.

- Mission Strategy: 4112 - Core

Since the new mission strategy will not be determined until Convention, the new mission strategy start-up costs will be funded from the proceeds generated by the sale of the Church of the Holy Spirit in Wayland. New mission strategy programs are expected to be funded in the 2018 budget.

- **Diocesan Convention: 4141 - Core**

The \$45,000 net costs budgeted for 2017 assume a two-day convention.

- **Journals and Diocesan Directory: 4151 - Core**

This line is funded at \$12,000.

- **Archives: 4211 - Core**

An amount of \$25,000 for operational expenses. The salary for an archivist is in cost center 4000.

- **Massachusetts Council of Churches: 4251 - Core**

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

- **Development Office: 4311- Supplemental**

Since 2009, the staff of the Office of Development has been, for the most part, funded in the supplemental budget, through a grant from the Bishop's Directed Funds. A portion of the cost of the development staff's compensation and benefits (\$57,366) is allocated to the Together Now campaign. The balance totals \$158,373. An additional \$35,000 is budgeted for events and other expenses.

- **Annual Fund: 4312 - Supplemental**

Projected expenses for 2017 are \$30,000 based on actuals.

- **Mission Hubs: 4343 - Supplemental**

In May of 2015, Diocesan Council voted to pledge \$600,000 (\$200,000 per year for three years) from the General Endowment Fund to support funding for the mission hubs. The year 2017 will see the second of these payments made for the hubs. Also see page 47.

- **General Convention: 4411 - Core**

To prepare for the expenses of sending a delegation to the Episcopal Church's triennial General Convention in 2018, \$18,000 will be accrued each year.

- **Province I Assessment: 4421 - Core**

The diocese's contribution is level funded at \$16,179.

- **Episcopal Church Asking: 4431 - Core**

At the 2015 General Convention, the Episcopal Church set a sliding schedule of diocesan ask rates for the next three years as follows: 18% in 2016, 16.5% in 2017 and 15% in 2018.

As part of this new schedule, the diocese elected in 2016 to use the three-year average rate in 2016-2018 to determine the assessment amount budgeted for each of the three years. In 2017 the budgeted amount is \$861,101, which is the pro-rated amount for the year.

Following this process, the diocese remains committed for the 2018 budget to using the same 16.5% in its preparation.

Episcopal & Diocesan Support - Core									
2017 Budget, 2016 Budget and 2015 Actual									
2017 Budget									
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Transfers	Total	2016 Budget	
2017 and 2016 Budget									
CC4000 EPISCOPAL AND DIOCESAN SUPPORT	-	301,189	-	-	-	-	301,189	137,947	
CC4011 Diocesan Bishop	-	236,217	57,500	-	-	-	293,717	294,525	
CC4012 Suffragan Bishop	-	183,021	32,500	-	-	-	215,521	212,071	
CC4014 Canon to the Ordinary	-	161,311	12,500	-	-	-	173,811	172,187	
CC4021 Assisting Bishops	-	-	25,000	-	-	-	25,000	25,000	
CC4023 New Bp Transition Reserve	-	-	30,000	-	-	-	30,000	20,000	
CC4031 Chancellor	-	-	1,500	-	-	-	1,500	1,500	
CC4061 Title IV	-	4,000	-	11,000	-	-	15,000	15,000	
CC4099 DL Budgeted Resources	-	90,000	77,876	30,000	-	-	197,876	160,000	
CC4111 Diocesan Council	-	-	10,000	-	-	-	10,000	10,000	
CC4112 Mission Strategy	-	-	-	-	-	-	-	40,000	
CC4121 Standing Committee	-	-	3,000	-	-	-	3,000	3,000	
CC4131 Diocesan Youth Council	6,000	-	-	-	-	-	6,000	6,000	
CC4141 Diocesan Convention	25,000	-	25,000	-	(5,000)	-	45,000	45,000	
CC4151 Journals and Diocesan Directory	-	-	12,000	-	-	-	12,000	12,000	
CC4211 Archives	-	-	25,000	-	-	-	25,000	25,000	
CC4251 Mass Council of Churches	50,000	-	-	-	-	-	50,000	50,000	
CC4261 Ecumenical Committee	-	-	1,500	-	-	-	1,500	1,500	
CC4411 General Convention	-	-	18,000	-	-	-	18,000	18,000	
CC4421 Province I Assessment & Program	16,179	-	-	-	-	-	16,179	16,179	
CC4431 The Episcopal Church Assessment	860,101	-	-	-	-	-	860,101	860,101	
Totals	957,280	975,738	331,376	41,000	(5,000)	-	2,300,394	2,125,010	
2015 Actual									
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Transfers	Total		
2015 Actual									
CC4000 EPISCOPAL AND DIOCESAN SUPPORT	-	83,526	-	-	-	-	83,526		
CC4011 Diocesan Bishop	560	241,701	98,685	-	(540)	-	340,406		
CC4012 Suffragan Bishop 1	-	175,769	41,523	44	(600)	-	216,736		
CC4014 Canon to the Ordinary	-	273,052	7,523	-	-	-	280,575		
CC4021 Assisting Bishops	-	235	10,791	-	-	-	11,026		
CC4022 Retired Bishops	-	-	613	-	-	-	613		
CC4023 New Bp Transition Reserve	-	-	-	-	-	-	-		
CC4031 Chancellor	-	-	1,271	13,833	-	-	15,104		
CC4061 Title IV	-	1,000	637	3,802	-	-	5,439		
CC4099 DL Budgeted Resources	-	22,465	717	4,298	-	-	27,480		
CC4111 Diocesan Council	-	-	12,257	35,000	-	-	47,257		
CC4112 Mission Strategy	-	770	3,253	2,542	-	-	6,565		
CC4121 Standing Committee	-	-	2,287	-	-	-	2,287		
CC4131 Diocesan Youth Council	2,089	-	462	-	-	-	2,551		
CC4141 Convention	19,031	663	28,060	213	(9,803)	-	38,164		
CC4151 Journals and Diocesan Directory	-	-	12,633	-	-	-	12,633		
CC4211 Archives	-	4,362	1,156	540	(580)	-	5,478		
CC4251 Mass Council of Churches	50,000	-	-	-	-	-	50,000		
CC4261 Ecumenical Committee	-	-	1,555	-	-	-	1,555		
CC4311 Development	-	-	-	-	-	14,445	14,445		
CC4411 General Convention	-	-	34,163	-	-	-	34,163		
CC4421 Province I Assessment & Program	16,179	-	2,634	-	-	-	18,813		
CC4431 The Episcopal Church Assessment	966,300	-	-	-	-	-	966,300		
Totals	1,054,159	803,543	260,220	60,272	(11,523)	14,445	2,181,116		

Episcopal & Diocesan Support - Supplemental 2017 Budget, 2016 Budget and 2015 Actual											
2017 Budget											2016 Budget
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Cost	Transfers	Revenue Offset	BDF Grants	Annual Fund	Net Cost	
	CC4311 Development	35,000	215,739	-	250,739	(57,366)	-	(193,373)	-	-	232,344
	CC4312 Annual Fund	-	-	30,000	30,000	-	-	-	(30,000)	-	30,000
	CC4343 Mission Hubs	200,000	-	-	200,000	(200,000)	-	-	-	-	200,000
	Totals	235,000	215,739	30,000	480,739	(257,366)	-	(193,373)	(30,000)	-	462,344
2015 Actual											
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Cost	Transfers	Revenue Offset	BDF Grants	Annual Fund	Net Cost	
	CC4311 Development	40	199,063	22,157	223,909	(57,366)	-	(161,839)	-	4,704	
	CC4312 Annual Fund	-	380	35,354	35,741	-	-	-	(26,000)	9,741	
	CC4343 Mission Hubs	44,899	638,252	70,175	782,970	(200,000)	(582,970)	-	-	-	
	Totals	44,939	837,695	127,686	1,042,620	(257,366)	(582,970)	(161,839)	(26,000)	14,445	

Administrative Services (see table on page 40)

The total 2017 budget for this area is \$1,485,894, all from the core budget. The 2016 core budget total was \$1,359,868.

• **Administrative Services: 5000 - Core**

This line contains compensation for eight staff positions (see roster on pages 59-60). This budget reflects the realignment of staff between departments, as well as a reduction in hours worked for certain staff.

• **Treasurer's Office: 5011 - Core**

This cost center includes support expenses of \$40,600 (office supplies, licenses, dues) along with outside service fees, including payroll and audit, totaling \$83,500. The cost center overall shows a net inflow, as the Treasurer's Office receives \$122,000 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 Fund program to cover administrative costs associated with the loan program (see cost center 5511).

• **Human Resources: 5021 - Core**

Consultants supplement this vital function as needed (\$10,500).

• **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 \$78,400, based on projections related to the cost of insurance. A Church Insurance reimbursement of \$12,000 is for safety audits.

• **Investments: 5051 - Core**

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) for making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2017 is \$6,000.

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

Included in this budget cost center is \$450,000 for payment in lieu of rent to the Cathedral Church of St. Paul and approximately \$54,550 for office equipment and postage.

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

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

• **Boston, Commercial Wharf, Unit 6: 5122 - Core**

This cost center reflects \$15,000 in condominium fees for the bishop's residence offset by a credit of \$40,761 which reflects the reduction in the bishop's cash salary in exchange for diocesan-provided housing. The size of the credit was set using the Church Pension Fund's "30% rule."

- 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. Bishop Gates, staff and Diocesan Council continue to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The core budget allocation for this property is \$34,000 in 2017. Some of this expense is offset by rental of the rectory to the Life Together program and by other occasional uses of the building by other groups who pay a fee for use of space.

- Diocesan Properties: 5141 - Core

This cost center includes \$10,000 for a consultant on the status and sales of diocesan properties and \$30,000 to be added to the reserve for property maintenance established formally by Diocesan Council in January 2015 and seeded with \$650,000, bringing the total in the reserve, before expenses, to \$720,000. Property insurance increased by \$6,249 and is included in this line item.

- Diocesan Equipment: 5142 - Core

An amount of \$12,500 to be added to a reserve fund to replace or purchase new capital equipment (computers, servers, copiers, etc.) formally established by Diocesan Council in 2015 and seeded with \$150,000, bringing the total in the reserve, before expenses, to \$185,000.

Proceeds from Closed Congregations: Additional Information

The proceeds of sales from these churches, closed before 2006, were added to the Fund for Congregational Vitality by vote of Diocesan Council: St. John's, East Boston; the Church of Our Saviour, Roslindale; and the Church of the Holy Nativity, Seekonk.

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
- St. David's Church, Pepperell - 2013
- Church of the Holy Spirit, Wayland - 2015

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 Diocesan Council to allocate. In February 2011, Council created a new Fund for Congregational Vitality from 50% of the net proceeds for the above congregations (except Brockton). The balance of the fund as of June 30, 2016, was \$3,976,863. It produces \$150,074 for the core budget to support congregational development around the diocese.

The remaining 50% has been available for distribution by Council. In early 2013, 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 food and clothing programs.

In 2014, Diocesan Council implemented a streamlined application process to discern how best to distribute proceeds for the ministry of our diocese.

Diocesan Council has yet to decide as to the disposition of the property of the former Church of St. Luke and St. Margaret, Allston. The Church of the Holy Spirit, Wayland has been sold and the former rectory is on the market. Once all costs related to the sale have been incurred, a full accounting and transfer of the appropriate balance will be made into this fund.

The total proceeds (after expenses) from the former St. Paul's Church and condo in Brockton are currently being used, by vote of Diocesan Council, to fund Grace Chapel, a worshipping community in Brockton.

The table on page 43 shows status of the proceeds for 13 of the closed congregations:

Proceeds—Gross revenue from sales and transfers of endowments

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 or the proceeds available after costs

50% of Net Proceeds—50% of the net proceeds is invested in 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: \$261,154 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. In addition, as part of its closing process, St. Andrew's Church, Belmont provided \$60,000 for the Ndumberi, Kenya, Mothers' Union, \$5,000 for expenses related to the Ndumberi grant and a \$10,000 grant to Jubilee Ministries to help administer the Ndumberi grant.
- 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—As of June 30, 2016, the balance is \$8,154.

Episcopal Diocese of Massachusetts
Use of Proceeds from Closed Parishes Summary
As of June 30, 2016

<u>Parish</u>	<u>Gross Proceeds</u>	<u>Less Direct Costs</u>	<u>Net Proceeds</u>	<u>50% of Net Proceeds</u>	<u>Expended through 2013</u>	<u>Designated or expended to date</u>		<u>Available</u>
						<u>Committed as part of 2014 Budget</u>	<u>Committed as part of 2014 Budget</u>	
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	(175,000)	(43,077)	(43,077)	-
Belmont	1,106,318	(39,797)	1,066,521	533,261	(219,894)	(70,000)	(60,000)	183,367
South Boston	1,106,939	(51,276)	1,055,664	527,832	(527,832)	-	-	-
Lynn	619,978	(153,451)	466,527	233,264	-	-	-	233,264
Lawrence	202,609	(73,837)	128,772	64,386	-	-	-	64,386
Halifax	249,880	(81,169)	168,711	84,356	-	-	-	84,356
Mills	448,030	(89,640)	358,390	179,195	-	-	-	179,195
Natick	255,287	(12,063)	243,224	121,612	-	-	-	121,612
Weymouth	667,724	(175,760)	491,964	245,982	-	-	-	245,982
Somerville	746,280	(84,411)	661,869	330,935	-	-	-	330,935
Pepperell	160,388	(119,742)	40,646	20,323	-	-	-	20,323
	6,884,374	(1,182,907)	5,701,468	2,850,734	(922,726)	(113,077)	(103,077)	1,711,854

<u>Additional commitments & Date of Council vote:</u>	
2/28/2013	Committed to Chelsea renovation project
9/4/2013	Committed to Allston property renovation project
9/6/2014	Committed to Lynn, St. Stephen's for restoration of church and parish house
9/6/2014	Committed to Weymouth, Holy Nativity for support of members from Trinity
1/23/2015	Committed to All Saints, Whitman to support Clergy salary (Years 1-3)
2/26/2015	Committed to Grace, New Bedford as matching grant for capital improvements
2/26/2015	Committed to St. Andrew's, New Bedford for capital improvements
5/21/2015	Committed to Christ Church, Medway for the parish's kitchen improvement project
	Less amount budgeted in 2014 and 2015 to be reimbursed from closed churches
	May 2015 Diocesan Council allocation of Pepperell loan proceeds
	Available Funds as of 6/30/2016
	\$ 8,154

Together Now Campaign: Additional Information

Together Now, a \$20-million diocesanwide fundraising campaign, officially began with approval of the 2011 Diocesan Convention, offering 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.

In addition, congregations were invited to partner with the diocesan effort by participating in collaborative campaigns. These joint campaigns enabled congregations to grow their already successful ministries or invest in infrastructure or endowment. Participating congregations received professional counsel and returned 30% of the funds raised to the diocesan effort, while keeping 70% for their local priorities.

Formal fundraising concluded in 2013, and by all accounts the endeavor was a rousing success—a testament to the generosity of Episcopalians offering witness to God’s bounty in their lives.

Campaign highlights:

- 100% of the congregations of the diocese elected to participate.
- Nearly 4,000 individual gifts and pledges have been offered.
- Just more than \$20 million was raised for diocesan campaign initiatives.
- An additional \$11.8 million has been raised by 39 local collaborative campaigns, bringing the total raised across the diocese to just under \$32 million.
- In the spring-summer of 2016 three more parishes completed collaborative campaigns. The diocesan portion added additional money for the Mission Hub Initiative totaling approximately \$200,000.

**Final Report of Fundraising
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, 2016, cash flow chart on page 46 reflects the collections of pledges and contributions from individuals and congregations, designated gifts as well as unrestricted gifts. An amount of \$7,921,058 has been returned to collaborative campaign parishes. Expenses fall into two categories: "Direct Campaign Expenses" which reflect money spent on the implementation of the campaign initiatives and "Other Expenses" which are costs associated with fundraising: consultations, fees and expenses. Under "Direct Campaign Expenses," the funds designated to the Barbara C. Harris Camp and Conference Center are included in the Youth and Young Adult column. Likewise, the Cederholm Cottage falls under the Camp and Conference Center column. Now that construction is complete, the Cathedral Church of St. Paul has received its campaign payments in full. Under "Other Expenses," the total amount spent on direct fundraising costs is slightly above 10% of the total raised for the diocesan portion, but when compared to the total raised across the diocese (approximately \$32 million), the percentage is a very favorable 7.3%.

Since the fundraising portion of the campaign began nearly five years ago, \$24,494,087, or 77%, of the total amount pledged has been received, thanks to the generosity and faithfulness of our donors. We hope that donors will continue to fulfill pledges in full so that all of the funds committed to the campaign initiatives can continue to be expended for God's mission across the diocese and beyond.

In May 2015, Diocesan Council voted to pledge \$600,000 from the General Endowment Fund over three years to support funding for the mission hubs. This money is to offset two large gifts that were made at the time of the campaign but did not realize any actual cash flow into the campaign budget. One was a matching gift to the Bishop Masereka Christian Foundation in the amount of \$250,000, and the other was a gift for Life Together, in the amount of \$350,000, which was not intended for the expansion of Life Together but for its existing budget.

Together Now Campaign
Cash Basis Revenues and Expenses
From Inception to June 30, 2016

	<u>General Restriction</u>	<u>Mission Tithe</u>	<u>Environmental Initiatives</u>	<u>Mission Hubs</u>	<u>Mission Institute</u>	<u>Y&Y Adults</u>	<u>Cathedral Renovations</u>	<u>Total</u>
Revenues								
Leadership Gifts	8,791,901	-	750	739,784	376,500	636,118	1,126,933	11,671,986
Collaborative Gifts from parishes (100% gross)	11,543,020	-	-	-	-	17,500	-	11,560,520
In pew collections	1,259,897	-	-	-	-	-	-	1,259,897
Interest Income	1,684	-	-	-	-	-	-	1,684
Gross Revenue	21,596,502	-	750	739,784	376,500	653,618	1,126,933	24,494,087
Less payments to collaborating parishes to date (70%)	(7,921,058)	-	-	-	-	-	-	(7,921,058)
Net Revenues	13,675,444	-	750	739,784	376,500	653,618	1,126,933	16,573,029
Direct Expenses								
Compensation and benefits	658,613	113,061	11,000	1,761,024	258	-	44	2,544,000
Direct Campaign Expenses, non compensation	200	773,300	813,868	299,106	642,268	1,982,228	3,894,000	8,404,970
Direct Program Expenses	1,304	5,016	2,365	376,379	-	-	-	385,064
Total Direct Expenses	660,117	891,377	827,233	2,436,509	642,526	1,982,228	3,894,044	11,334,034
Other Expenses								
Operating and staff support	568,982	12,855	4,203	1,710	151	50	-	587,951
Technology costs	3,479	-	-	540	-	-	-	4,019
Facilities and other services	30,160	-	-	-	-	-	-	30,160
Management and professional services	1,941,397	30	3,780	-	-	-	-	1,945,207
Total Other Expenses	2,544,018	12,885	7,983	2,250	151	50	-	2,567,337
Total Expense	3,204,135	904,262	835,216	2,438,759	642,677	1,982,278	3,894,044	13,901,371
Net Cash Inflow from inception	10,471,309	(904,262)	(834,466)	(1,698,975)	(266,177)	(1,328,660)	(2,767,111)	2,671,658

CAMPAIGN BUDGET	MISSION HUBS	ST STEPHENS SOUTH END and LIFE TOGETHER	GREEN GRANTS AND LOANS	CATHEDRAL	CAMP	MISSION INSTITUTE	MISSION TITHE	NET CAMPAIGN EXPENSES	RESERVES	TOTAL
INITIAL ALLOCATION	6,500,000	0	2,000,000	4,000,000	2,000,000	1,000,000	2,000,000	2,500,000	0	20,000,000
previously presented reallocation (1)	250,000		(100,000)	(150,000)					0	0
separate St Stephens SE (2)	(500,000)	500,000						800,000	0	0
additional admin/consultants	(800,000)								0	0
RUNNING TOTAL A	5,450,000	500,000	1,900,000	3,850,000	2,000,000	1,000,000	2,000,000	3,300,000	0	20,000,000
ECM pledge for Life Together (3)		(350,000)					(250,000)			(350,000)
pledge for Bp Masereka Fdn (US) (4)		350,000					250,000			(250,000)
Diocesan matching grant (5)	240,000									600,000
transfer (6)						(240,000)				0
RUNNING TOTAL B	5,690,000	500,000	1,900,000	3,850,000	2,000,000	760,000	2,000,000	3,300,000	0	20,000,000
primary adjustment for reserves (7)	(290,000)	0	(140,000)	0	0	(60,000)	(145,000)	0	635,000	0
secondary adjustment for reserves (7)	0	0	0	(170,000)	(145,000)	0	0	0	315,000	0
CURRENT ALLOCATION	5,400,000	500,000	1,760,000	3,680,000	1,855,000	700,000	1,855,000	3,300,000	950,000	20,000,000

HUB ALLOCATION WITHIN \$20 MILLION CAMPAIGN BUDGET

South Coast	1,200,000
Cape and Islands	500,000
Merrimack Valley	1,000,000
Metrowest	1,000,000
North Shore	1,000,000
South Shore	400,000
Roxbury/Dorchester	150,000
Boston/Cambridge	150,000
First year	
First year	
Total Mission Hubs funded by the first \$20 million	5,400,000

NOTES, ASSUMPTIONS, AND ACTIONS

- (1) Earlier re-allocation decision
- (2) Grant directed to programs at St Stephen's South End is separated from Mission Hubs budget
- (3) The ECM pledge for Life Together supports activities budgeted through the supplemental budget
- (4) The campaign accepted an anonymous pledge to support the Bishop Masereka Foundation (US) directly
- (5) The Diocesan Council approved a new unrestricted \$600,000 grant to match the ECM/Life-Together and Bp Masereka Foundation (US) pledges
- (6) Transfers \$240,000 from the Mission Institute target funding to the Mission Hubs
- (7) Establishes a reserve of \$950,000 against delinquent and incomplete pledges. The Cathedral and Camp will not be charged unless more than \$635,000 is needed.
- (8) The target funding levels for the first five mission hubs approved is not cut within the first \$20 million
- (9) Potential priorities for the "cautious faith budget", requiring an additional \$1.89 million

Full South Shore funding	350,000
Full Roxbury/Dorchester funding	850,000
Boston/Cambridge Hub	450,000
Restore Mission Institute full funding	240,000
TOTAL OPPORTUNITIES FUNDED FROM RE-OPENED CAMPAIGN	1,890,000

Endowment Funds

The financial operations of the diocese are supported by various endowment funds.

Agency Funds are funds owned outright by the diocese. The treasurer and Diocesan Council are ultimately responsible for the investment and use of these funds. Diocesan Council relies on its Financial Advisory Committee to monitor these funds, and the Council has in place a written Investment Policy Statement (see www.diomass.org/inside/docs/investment-policy-statement). In the audited financial statements of the diocese, the Agency Funds are included as “Investments” within the listing of Assets of the Diocese. As of Dec. 31, 2015, the reported value of Investments was \$33,975,784.

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

Those trusts for which the diocese’s claim as a beneficiary is absolute and not subject to the discretion of the trustees appear in the financial statements as “Beneficial interest in perpetual trusts” within the listing of Assets of the Diocese. As of Dec. 31, 2015, the reported value of Beneficial interest in perpetual trusts was \$31,549,969.

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

The TOD is the legal owner of most of the relevant trust funds and is also the investment manager for most of the agency funds directly controlled by the diocese. The TOD’s investment vehicles—the Diocesan Investment Trust (DIT) Stock Fund and the DIT Bond Fund— are also available to individual parishes and other Episcopal organizations for their own agency funds. There are more than 165 DIT participants.

Twenty-eight trustees serve on the TOD. Three are diocesan officers, five are elected by Diocesan Convention, five are appointed by the bishop, and the remaining 15 are elected by the trustees themselves. Additional information about the TOD is found at www.trusteesofdonations.org.

Diocesan Endowment Funds and Bishop Directed Funds – See tables on pages 53-55.

All Agency Funds are owned by the diocese and thus controlled directly by Diocesan Council. The spending policy draws from these funds are voted by either Diocesan Convention as part of the annual budget consideration or by Diocesan Council as needed during the year.

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

One of the goals of the 2008 reorganization of diocesan operations (see page 18) was increased clarity and transparency around the BDF’s. A key organizational tool was the identification of two separate budgets, the “core” budget and the “supplemental” budget. The supplemental budget provided a place to budget and reveal spending supported by the BDF’s and other revenue streams over which the bishop has greater influence. Over time, this process has become more regular and formalized around the notion of “BDF grants.” In the 2017 budget, the supplemental budget includes approximately \$695,000 of BDF grants and associated expenditures.

At the same time, the BDF's are also there to support true discretionary spending by the bishop, some of which is appropriately not run through the supplemental budget. This is a judgment call appropriately left to the diocesan bishop, and is a small part of the total BDF spending. For 2017, the BDF grants in the supplemental budget represent almost 94% of the available BDF income for the year.

Fund Restrictions

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

From a budget preparation perspective, our current approach is to draft a budget that addresses the current needs of the diocese and see whether the preferred budget is consistent with fund restrictions. Note that most of the diocesan core revenue is from congregation assessments and unrestricted endowment income, so the issue of fund restrictions arises for just a small part of the budget. Furthermore, many restrictions are consistent with current needs. Only in a few cases are there specific cost centers or programs designed to fulfill specific fund restrictions.

Description of Agency Funds

This section of the budget book provides some additional information about the history and use of the agency funds (i.e., those legally owned by the diocese) that support the budget. The information presented here is based on primary and secondary sources. It should be viewed as our best information at this point, but not necessarily the final word or authority.

Unrestricted

- The General Endowment Fund (DIT 7002X, proposed draw \$107,362)

This fund is special since it serves as the “cushion” and first source of funds when extraordinary circumstances arise. In recent years, Diocesan Council has voted to withdraw funds to help pay for the recent and future episcopal elections and transitions, to establish reserves for property and equipment maintenance, to acquire a residence and fund mortgages for the bishops, and to help pay for HVAC renovations to the 138 Tremont buildings maintained by the Cathedral Church of St. Paul. This fund is also currently designated as the primary investment account for unrestricted bequests and gifts.

Council Designation for Reserves

- The Reserve Endowment Fund (Fidelity Short Term Bond, draw as needed)

In January 2015, Diocesan Council established three new reserve accounts for property maintenance, episcopal elections and capital equipment, and it transferred \$1,050,000 from the General Endowment Fund to a Fidelity short term bond fund to support these reserves. The creation of these accounts reduces the need to draw upon the General Endowment Fund for capital needs. The Executive Committee of Diocesan Council responds to requests for funding from these accounts. Note, this fund is not listed on page 53 since it does not contribute to the core budget revenue from agency endowments.

Council Designation of Closed Parish Proceeds

- The Fund for Congregational Vitality (DIT 7004I, proposed draw \$150,074)

This fund was initially established in 2011 with half of the net proceeds from nine closed congregations. Since then, Council has followed the same policy of putting a portion of proceeds from other closed congregations into this endowment fund. In addition, Council has consolidated

existing endowment funds that were also created through the proceeds of closed congregations going back to the mid-1980's. A full list of all the congregations that have contributed to the Fund for Congregational Vitality is on page 41. The spending draw from this fund helps pay for the congregational grant programs, cost centers 2011 and 2012.

- Deaf Ministry Endowment (DIT 7004H, proposed draw \$8,000)

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

- Endowment Fund - Roslindale (DIT 7002Z, proposed draw \$3,972)

The fund was established from the endowment fund from Our Saviour, Roslindale, which closed in 1987. When Council initially received these funds in 1992, it set a policy, continued since then, to provide half of the annual draw to Emmanuel, West Roxbury and the other half for diocesan programs. In 2011, half of the fund proceeds were transferred to the Fund for Congregational Vitality, and subsequent budgets have granted the full draw from this fund to Emmanuel through cost center 2014.

Council Designation of Proceeds from the 1964 Diocesan Advance Fund (DAF) Campaign

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

- DAF Bishop Nash Fund (DIT 7002M, proposed draw \$9,055)

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

- Clergy Salary Fund (DIT 7002N, proposed draw \$33,254)

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

- Campus Ministries Fund (DIT 7002U, proposed draw \$10,461)

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

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

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

Council Designation of Proceeds from the 1983 Adventure In Mission (AIM) Campaign

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

- AIM Christian Witness in Education (DIT 7003C, proposed draw \$ 41,676)

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

- Youth on Mission (DIT 7003E, proposed draw \$7,899)

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

- AIM William Coolidge Endowment Fund (DIT 7003F, proposed draw \$164,439)
This fund provides broad support for programs offered in the Congregational Resources and Training and Strategic Ministries areas of the budget.

- AIM Hospital Ministry (DIT 7002J, proposed draw \$25,073)
Hospital ministry was a part of both the DAF and the AIM campaigns, and archival evidence suggests that this fund has its roots in the 1960s DAF drive. In recent years, hospital ministry has not had a high profile in the annual budget. The clergy supported through various cost centers do provide hospital ministry as a regular part of their service.

Other Various Council Designations

- John B. Coburn Endowment Fund (DIT 7002C, proposed draw \$54,889)
The Rt. Rev. John B. Coburn, the 13th bishop, served from 1976 to 1986. Upon his retirement Council established this fund in his honor to support “a Chair of Theology for the Mission of the Church.” It is the expectation to fund theological programs in 2017.

- Frederick C. Lawrence/Rhineland Fund (DIT 7002P, proposed draw \$11,098)
The Rt. Rev. Frederick C. Lawrence was bishop suffragan from 1956 to 1968. He also served as the chairman of the Bishop Rhineland Foundation, which provided support for Harvard-Radcliffe chaplaincy. Council established a fund in his honor upon his retirement, and for the next 12 years the draw supported the Foundation. More recently, the draw has supported college ministry work in Cambridge through the Life Together program and the MIT chaplaincy.

- African Scholarship Fund (DIT 7002E, proposed draw \$11,418)
Council created this fund in 1988 for a scholarship program for African students, currently supported through the MSASA Episcopal Divinity School program, cost center 1213.

- Endowment for Maintenance (DIT 7002G, proposed draw \$8,822)
Council in 1990 created this fund with the proceeds of a bequest. The written record from that time recommended that future Councils direct one-third of future bequests to this fund account, at least until it reached a balance of \$500,000. In January 2015 Council voted to establish the Reserve Endowment Fund (described above) and to formally replace the 1990 policy. The motivation to do so was to separate the ministry of maintenance from the random arrival of bequests. The spending draw from this existing endowment account will continue to support regular maintenance needs through cost centers 5111 through 5125.

- Seminarian Education Endowment Fund (DIT 7004E, proposed draw \$55,363)
Created to support seminarian education through the scholarship program in cost center 1312.

Council Designation of Proceeds from Other Properties

- Eliza Gray Case TRS P E C (DIT 7002T, proposed draw \$135,162)
Council received these funds when the Eliza Gray Case home was sold. The legal review of the sale determined that the funds can be used for the Sherrill House in Boston, for general purposes of the diocese or for purposes in southeast Massachusetts. The current application is to support the Bristol County Case Grants program, cost center 2013.

- House of Mercy Fund (DIT 7002Y, proposed draw \$31,703)
Council received these funds when the Works of Mercy was dissolved in 1975. The current application is to support grants through the 12 deanery assemblies for community outreach programs, cost center 2022.

Designation of Gifts and Bequests for Diocesan Operations

These funds provide general support for diocesan operations through the core budget:

- Adelaide R. Harris Fund (DIT 7002S, proposed draw \$222)
- R. W. Chisolm Fund (DIT 7003R, proposed draw \$4,082)

Designation of Gifts and Bequests for Diocesan Programs

• Thomas M. Coffin Fund (DIT 8000V, proposed draw \$5,705)
Established in 1939 “for needy churches in the diocese,” currently applied to the Strategic Ministries area.

• A. E. Emery Camp Dennen Fund (DIT 7002O, proposed draw \$1,956)
Established by a bequest in 1976, currently used to provide a grant to the Barbara C. Harris Camp and Conference Center, cost center 3921.

• Harriet G. Averill Fund (DIT 7002L, proposed draw \$1,748)
Established by a bequest in 1976, for equal sized grants to American Indian Missions and to the United Thank Offering. The current application supports a grant to the Native American Lillian Valley School in Idaho, cost center 3952.

• Caroline C. Haskett Fund (draw 7002R, proposed draw \$88)
A small fund established in 1978, identified for support of Church Home Society and orphan children. Given the size of the draw, it is implicitly used for basic infrastructure support for the Church Home Society operations.

• Jessie B. Cox Fund (DIT 7003A, proposed draw \$34,460)
Established in 1980, this draw supports recently ordained clergy in training under the supervision of an experienced clergy person. The current application supports the Urban Resident program in cost center 3411.

• William V. Tripp Jr. Memorial Fund (DIT 7003B, proposed draw \$44,137)
Established in 1987 to support the position of diocesan youth minister, cost center 3011.

• C.L.T. Lee / B. Wong Fund (DIT 7002D, proposed draw \$5,024)
Established in 1988 to support ministry among Asian Americans, cost center 3311.

Designation of Gifts and Bequests for Parishes

• Abby Jackson Fund (DIT 8000W, proposed draw \$3,213)
Established in 1939 to support grants to Christ Church, Plymouth, included in cost center 2014.

• Amelia Grant Schwarz Fund (DIT 7002W, proposed draw \$21,742)
Established in 1947 to provide an annual grant for the housing costs of the rector of St. John’s, Sharon, included in cost center 2014.

Designation of Gifts and Bequests for the Bishop

• Maurine C. Coburn Trust (DIT 7003D, proposed draw \$7,451)
Established in 1987 for assistance of clergy at the discretion of the bishop, included in cost center 4011.

• Bishop’s Entertainment Fund (DIT 8000X, proposed draw \$6,891, plus 16,000 shares Proctor & Gamble, projected \$42,400 in dividend income)
Both the DIT fund and the share holdings are related to a single gift in 1969 for the bishop to provide hospitality for clergy and visitors. In recent years this income has subsidized the annual clergy conference.

• Frederick A. Reeve Fund (DIT 8000T, proposed draw \$9,623)
Established in 1991 for use by the bishop, included in cost center 4011.

AGENCY ENDOWMENTS	Market Value of Fund -	
	6/30/2016	4% Draw
D7002X GENERAL ENDOWMENT FUND	2,940,748	107,362
D7002C JOHN B COBURN ENDOWMENT FUND	1,349,693	54,889
D7002D C.L.T. LEE / B. WONG FUND	123,430	5,024
D7002E AFRICAN SCHOLARSHIP FUND	280,768	11,418
D7002G ENDOWMENT FOR MAINTENANCE	216,982	8,822
D7002J AIM / HOSPITAL MINISTRY	616,522	25,073
D7002L HARRIET G AVERILL FUND	42,978	1,748
D7002M D A F BISHOP NASH FUND	222,667	9,055
D7002N CLERGY SALARY FUND	817,694	33,254
D7002O A E EMERY CAMP DENNEN FUND	48,096	1,956
D7002P FREDRICK C LAWRENCE/RHINELANDER FUND	272,895	11,098
D7002R CAROLINE C HASKETT FUND	2,174	88
D7002S ADELAIDE R HARRIS FUND	5,451	222
D7002T THE ELIZA GRAY CASE TRS P E C	3,322,685	135,162
D7002U CAMPUS MINISTRIES FUND	257,236	10,461
D7002W AMELIA GRANT SCHWARZ FUND	527,241	21,742
D7002Y HOUSE OF MERCY FUND	779,562	31,703
D7002Z ENDOWMENT FUND - ROSLINDALE	97,125	3,972
D7003A THE JESSIE B COX FUND	847,361	34,460
D7003B WILLIAM V. TRIPP JR. MEMORIAL FUND	1,085,311	44,137
D7003C AIM CHRISTIAN WITNESS IN EDUC	1,024,796	41,676
D7003D MAURINE C COBURN TRUST	183,210	7,451
D7003E YOUTH ON MISSION	194,230	7,899
D7003F AIM WILLIAM COOLIDGE ENDOWMENT FD	4,043,501	164,439
D7003R W. CHISOLM FUND	100,385	4,082
D7004E SEMINARIAN EDUCATIONAL ENDOWMENT	1,361,184	55,363
D7004H DEAF MINISTRY ENDOWMENT	648,797	25,747
D7004I FUND FOR CONGREGATIONAL VITALITY	3,976,863	150,074
D8000T FREDERICK A REEVE FUND	236,553	9,623
D8000V THOMAS M COFFIN FUND	140,230	5,705
D8000W A. JACKSON FUND	78,937	3,213
D8000X BISHOPS ENTERTAINMENT	169,402	6,891
TOTAL	26,014,709	1,033,809

TRUST ENDOWMENTS	Market Value of Fund -	
	6/30/2016	4% Draw
D2110B G & S TURNER MEMORIAL FUND	14,997	614
D4065A ST MATTHEWS ENDOWMENT FD	164,048	6,717
D4065B SAMUEL & EMMA DOWNING FD	8,645	354
D4065C JOSEPH C STOREY FUND	95,200	3,898
D4065D MARY A WILSON FUND	50,135	2,053
D4065E A SMITH FUND FOR RECTORY MAINTENANCE	72,617	2,973
D7000A DIOCESAN ENDOWMENT FUND	5,018,979	205,535
D7000B VOTE OF CORP DIOCESAN FUND - VOC	1,994,244	81,663
D7000D FAY DONATION I	260,396	10,663
D7000G BENJAMIN LEEDS FUND - VOC	5,403,510	221,276
D7000I CHURCHES AND CHAPELS FUND - VOC	97,985	3,968
D7001E APPLETON FUND	54,041	2,213
D7001F BISHOP'S FUND	1,267,894	51,920
D7001G BISHOP OF MA SALARY FUND	159,640	6,537
D7001H BISHOPS HOUSE FUND	262,048	10,731
D7001I SUFFRAGAN BISHOPS FUND	1,026,098	42,018
D7001J CAMILLA DAVENPORT FUND	40,192	1,646
D7001K CORNELIA A FRENCH FUND	898,504	36,794
D7001L KATHERINE FRENCH FUND	186,745	7,647
D7001O ETHEL A CLARK FUND	1,230,793	50,401
D7001Q MARY K D BABCOCK FD I	285,907	11,708
D7001R MARY K D BABCOCK FD II	35,683	1,461
D7001S JULIA K DAVEY FUND	88,855	3,639
D7001T WILLIAM C WINSLOW FUND - VOC	13,019	533
D7001W WK OF MERCY HARVISON FUND	48,079	1,969
D7001X AMY YEAMES FUND	57,685	2,362
D7001Y EDITH MUNRO FUND	25,194	1,032
D7002Q AC BULLARD FD STUDENTS	242,431	9,927
D7003X PATTON MEMORIAL FUND	1,310,830	53,652
D7004B PATTON FUND FOR MAINTENANCE	108,107	4,425
D7004C KATHERINE M. FOSTER TRUST	228,151	9,338
D7004D FRANK H. BURNETT FUND	47,231	1,933
D9000Z ABBY BROWN TRUST - VOC	189,306	7,752
D9001B EDMUND F SLAFTER FUND II	118,545	8,137
TOTAL	21,105,733	867,489

		Market Value of Fund -	
		6/30/2016	4% Draw
UNRESTRICTED BDF ENDOWMENTS			
D8000B	BISHOPS UNREST. DISCRETIONARY FUND	3,654,404	149,647
D8000D	MARIA A APPLETON DODGE FUND	1,608,071	65,850
D8000G	MARGARET KIMBALL FUND	64,323	2,634
D8000J	THOMAS NELSON MEMORIAL FUND	22,306	913
D8000K	S & F ROWE FUND	22,403	917
D8000L	VALENTINE SLATERY FUND	20,097	823
D8000P	AMELIA WORTHINGTON FUND II	612,579	25,085
D8000U	H.S. HOWE FUND	1,357,659	55,596
D9000M	SARAH H A BURNHAM FUND	1,687,474	69,102
D9000N	THERESA COOLIDGE FUND	114,003	4,668
D9000Q	ELIZA S HATFIELD FUND - VOC	1,249,905	51,183
D9000S	FRANCIS S PARKER FUND	686,465	28,111
D9000U	AGNES WINSLOW RILEY FUND	347,715	14,239
D9000V	SARAH L SLATTERY FUND	122,624	5,021
D9000X	FRANCES L WHITTEMORE FUND	144,278	5,908
D9000Y	ROBERT E TOWNSEND TRUST - VOC	84,899	3,477
		11,799,206	483,174
RESTRICTED BDF ENDOWMENTS			
D7001C	PERCIVAL L & JULIA A POWELL	333,822	13,670
D8000A	MONKS/STEVENS/PITTMAN	699,740	28,654
D8000C	ANNIE O BALDWIN FUND II	15,311	627
D8000E	PAULINE CONY DROWN FUND	56,359	2,308
D8000F	HILL FUND	292,912	11,995
D8000H	LAURA R LITTLE MEMORIAL FUND	55,708	2,281
D8000I	EDWARD F MCINTIRE FUND	16,634	681
D8000M	PATIENCE H SLOANE FUND	221,165	9,057
D8000N	GEORGE AUGUSTUS STRONG MEM FUND	36,579	1,460
D8000O	AMELIA WORTHINGTON FUND I	424,154	17,369
D8000Q	SHERBONDY FUND	4,268	175
D8000R	THE DILL FUND	82,039	3,359
D8000S	ANNA MUIRSON JOHNSON BELLAMY FD	25,324	987
D9000L	EAST CAMBRIDGE FUND - ASCENSION	84,525	3,463
D9000O	FAY DONATION II	260,396	10,663
D9000P	WILLIAM A GATCHELL FUND	826,594	33,849
D9000T	SWANSEA RESTHOUSE FUND	2,782,017	113,923
D9000W	C HARRISON SOWDON FUND - VOC	94,812	3,883
		6,312,360	258,404
TOTAL		18,111,565	741,578

Grants to Congregations in 2015

Congregational Development Open Grants			\$150,000
Congregation	City	Program	Grant Amount
<i>common cathedral</i>	Boston	<i>common art</i>	7,100
St. Paul's Church	Bedford	First Impressions of St. Paul's	2,950
St. Stephen's Church	Boston	BLOCS	4,400
St. James's Church	Cambridge	New Antiracism Initiatives	10,000
All Saints of the North Shore	Danvers	All Sinners and Saints	7,700
Grace Church	Everett	Adult Bible Study Reboot	3,900
St. Luke's Church	Fall River	Welcome the Visitor Program	5,600
Trinity Church	Haverhill	Sing a New Church Phase 2	3,000
St. Stephen's Church	Lynn	Leadership, Learning, and Liturgy	8,000
St. Andrew's Church	New Bedford	Strengthening Our Foundations	4,800
St. Thomas's Church	Taunton	New Signs for New Property	3,000
			60,450

Congregational Development Targeted Grants			\$60,000
Congregation	City	Program	Grant Amount
Lower Merrimack Valley Collaborative		various projects	10,500
Trinity Church	Bridgewater	full-time rector salary	12,000
St. Stephen's Church	Cohasset	Screening of <i>Traces of the Trade</i>	2,021.75
St. Andrew's Church	Hanover	Stewardship Challenge	9,000
St. Paul's Church	Hopkinton	bridge priest	11,608
St. Andrew's Church	New Bedford	Special Needs for 5th-graders	7,700
St. Andrew's Church	Wellesley	Partnership with Wellesley Chaplaincy	4,150
			56,980

House of Mercy Deanery Grants			\$30,488
Congregation	City	Program	Grant Amount
Alewife Deanery			
St. Paul's Church	Bedford	Family Gift Cards	1,080
St. James's Church	Cambridge	Helping Hand Food Pantry	380
St. Peter's Church	Cambridge	Afterworks Program	540
Christ Church	Waltham	Diaper Depot	540
Boston Harbor Deanery			
Emmanuel Church	Boston	BostonWarm	1,500
St. Stephen's Church	Boston	Teen Employment and Leadership Development	1,040
Cape & Islands Deanery			
St. Mary's Church	Barnstable	Amazing Grace of Cape Cod	2,540
Charles River Deanery			
All Saints' Church	Brookline	Baby's Smart Start	800
Christ Church	Needham	Circle of Hope porta-cribs	940
St. Andrew's Church	Wellesley	St. Andrew's/St. Stephen's Mission Partnership	800
Merrimack Valley Deanery			
Trinity Church	Haverhill	Dinah's House	1,600
St. Paul's Church	Newburyport	Food Voucher Program	940
Mt. Hope/Buzzards Bay Deanery			
Grace Church	New Bedford	Laundry Love	2,540
Neponset River Deanery			
Church of the Advent	Medfield	Family Move-out Kits for Medway Family Shelter	1,528
North Shore Deanery			
All Saints of the North Shore	Danvers	supplies for homeless children	1,500
St. Stephen's Church	Lynn	parenting workshops for parents of adolescents	1,040
South Shore Deanery			
Emmanuel Church	Braintree	KidzCloset	845
St. Andrew's Church	Hanover	Wellspring	850
Trinity Church	Marshfield	Carolina Hill shelter	845
			21,848

Sending Serving Deanery Grants			\$48,000
Congregation	City	Program	Grant Amount
Alewife Deanery			
St. Paul's Church	Bedford	Appalachia Service Project	950
St. Mark's Church	Burlington	Pumpkin Patch Ministry	500
St. James's Church	Cambridge	Helping Hand Food Pantry	1,000
St. James's Church	Somerville	ESL Education Program	250
Christ Church	Waltham	Diaper Depot	1,000
Church of the Good Shepherd	Watertown	Vacation Garden School	300
Boston Harbor Deanery			
Church of the Advent	Boston	Tuesday Community Supper	1,500
The Crossing	Boston	Confronting Racism Program	1,750
St. Stephen's Church	Boston	Teen Employment and Leadership Development	750
Charles River Deanery			
All Saints' Church	Brookline	Playground for St. Francis Xavier Parish	2,000
Christ Church	Needham	Haiti Music Program	1,750
Concord River Deanery			
St. Andrew's Church	Framingham	Millennials' Habitat for Humanity Build Day	375
Merrimack Valley Deanery			
St. James's Church	Groveland	Mitch's Place	300
Grace Church	Lawrence	Radio Program	2,400
St. John's Church	Lowell	KALEIDOSCOPE	1,300
Mt. Hope/Buzzards Bay Deanery			
St. Andrew's Church	New Bedford	Outreach Sunday School	2,000
Neponset River Deanery			
St. Michael's Church	Milton	Safe Passage in Guatemala	3,000
North Shore Deanery			
St. Peter's Church	Beverly	Sunday Night Suppers	1,000
All Saints of the North Shore	Danvers	holiday party for foster children	1,000
St. Stephen's Church	Lynn	Kids in Community summer program	2,000

South Shore Deanery				
St. John's Church	Holbrook	Family Partnerships of the Southeast Medically Complex Program		1,050
Taunton River Deanery				
Trinity Church	Bridgewater	J2A Pilgrimage		4,000
				30,175
Case Trust and Bristol County Fund				\$123,207
Congregation	City	Program		Grant Amount
South Coast Mission Hub		Life Together Young Adult Community; Grass Roots Initiative; Project Discovery		17,500
All Saints' Church	Attleboro	One Family, A Mission of Unity		6,000
St. Peter's Church	Dartmouth	The Labyrinth for Healing and Renewal; Christmas Homeless Outreach Ministry; Breakfast with Santa		4,400
Church of the Good Shepherd	Fairhaven	Spirit of Grace		3,500
Church of the Holy Spirit	Fall River	Bayside Fellowship; Senior Fellowship; Outreach and Publicity; Summer Family Carnival		12,500
St. Luke's Church	Fall River	Urban Youth Education and Empowerment Program		10,000
Grace Church	New Bedford	God Loves Our Rosebud Youth Mission Trip; Food Pantry		6,500
St. Andrew's Church	New Bedford	Sustaining a Community of Children		18,000
Grace Church	North Attleborough	E-Cubed Academy Healthy Snacks		10,500
Bristol Trinity Episcopal Church	North Easton	Taunton Area Community Table; Tide Me Over; Backpack Outreach Program; Taunton Laundry Love		20,200
Church of Our Saviour	Somerset	Annual Parish Retreat; Annelle Delorme-Hagerman Food Pantry		4,700
St. Thomas's Church	Taunton	Senior Ministry		2,500
				116,300
Creation Care Initiative: Simple Acts of Stewardship Grants				
Congregation	City	Program		Grant Amount
St. John's Church	Jamaica Plain	Dawn Tesoro's GreenFaith Fellowship Tuition		1,000
St. Mary of the Harbor	Provincetown	creation care newspaper ads		1,000
Trinity Church	Stoughton	Environmental Stewardship Assessment		247.50
Emmanuel Church	West Roxbury	memorial garden and adult education series		1,000
				3,248
Creation Care Initiative: Green Improvement Grants				
Congregation	City	Program		Grant Amount
Church of the Good Shepherd	Acton	parking lot LEDs; on-demand DHW		5,000
All Saints' Church	Attleboro	interior storm windows; insulation; ceiling fans; thermostat relocation		10,000
St. John's Church	Charlestown	parish house windows		10,000
All Saints' Church	Chelmsford	furnace and smart thermostats		10,000
Trinity Church	Concord	energy-efficient windows in undercroft		10,000
Church of the Good Shepherd	Dedham	energy-efficient lights and windows		9,986
St. Mary's Church	Dorchester	3rd-floor apartment mini-split system; insulation		8,000
St. James's Church	Groveland	windows and education program		9,035
St. Gabriel's Church	Marion	solar electricity system		5,000
Christ Church	Needham	insulation and low-flow toilets		10,000
Grace Church	Norwood	LEDs and fixtures		10,000
Church of the Holy Spirit	Orleans	insulation		2,000
Church of the Good Shepherd	Reading	windows		10,000
St. Mark's Church	Southborough	church and parish hall LEDs		9,000
St. Thomas's Church	Taunton	heat pumps and windows		10,000
Emmanuel Church	West Roxbury	interior storm windows		2,400
St. Peter's Church	Weston	zoning; thermostats; outdoor reset		10,000
Trinity Church	Wrentham	windows		10,000
				150,421
Mission Tithe Matching Grants				
Congregation	City	Program Location		Grant Amount
Church of the Good Shepherd	Acton	El Ocotillo, El Salvador		7,500
St. Stephen's Church	Boston	Appalachia		10,000
St. Christopher's Church	Chatham	Goll Farm, Liberia		7,000
Church of St. John the Evangelist	Duxbury	Tegucigalpa, Honduras		6,000
Church of Our Redeemer	Lexington	Tegucigalpa, Honduras		10,000
St. Paul's Church	Natick	Mpwapwa, Tanzania		10,000
Grace Church	North Attleborough	Tanga, Tanzania		9,500
				60,000
Continuing Education Grants				
Congregation	City	Program		Grant Amount
St. Mary's Church	Barnstable	Holy Land Pilgrimage		500
Trinity Church	Bridgewater	Clergy Supervision & Support		500
St. Paul's Church	Dedham	Celtic Christian Pilgrimage to Ireland		500
Ascension Memorial Church	Ipswich	Contemplative Retreat		500
Church of the Good Shepherd	Reading	Education for Ministry Training		350
All Saints' Church	Stoneham	Fundamentals of Transitional Ministry		500
St. Elizabeth's Church	Sudbury	MBSR Course: "Mindfulness Practices"		346.12
St. Elizabeth's Church	Sudbury	Public Witness & Community Partnership		500
Trinity Church	Topsfield	Holy Land Pilgrimage		500
Church of the Holy Spirit	Wayland	Celtic Christian Pilgrimage to Ireland		500
Paul Bresnahan		Racism in America		450
Susanne George		Deacons' Triennial Assembly		500
				5,646.12
Sabbatical Funds				
Congregation	City			Grant Amount
All Saints' Church	Belmont			4,000
Trinity Church	Bridgewater			4,000
Grace Church	Everett			4,000
Church of the Holy Spirit	Fall River			4,000
Trinity Church	Haverhill			4,000
St. Thomas's Church	Taunton			4,000
				24,000
Winter Relief Grants				
				Grant Amount
Church of The Good Shepherd	Acton	Winter Relief Grant		500
Christ Church	Andover	Winter Relief Grant		500
St. John's Church	Arlington	Winter Relief Grant		500
St. Andrew's Church	Ayer	Winter Relief Grant		500
St. Mary's Church	Barnstable	Winter Relief Grant		500
St Paul's Church	Bedford	Winter Relief Grant		500
St Peter's Church	Beverly	Winter Relief Grant		500
St John's Church	Beverly Farms	Winter Relief Grant		500
Emmanuel	Boston	Winter Relief Grant		500
St Peter's	Buzzards Bay	Winter Relief Grant		500
Christ Church	Cambridge	Winter Relief Grant		500
St Christopher's Church	Chatham	Winter Relief Grant		500
Saint Lukes/San Lucas	Chelsea	Winter Relief Grant		500
Church of the Redeemer	Chestnut Hill	Winter Relief Grant		500
All Saints' Church	Danvers	Winter Relief Grant		500

St. Paul's	Dedham	Winter Relief Grant	500
St. John's Church	Duxbury	Winter Relief Grant	500
St. Luke's	Fall River	Winter Relief Grant	500
St. Mark's	Foxboro	Winter Relief Grant	500
St. Andrew's Church	Framingham	Winter Relief Grant	500
St. John's Church	Franklin	Winter Relief Grant	500
St. John's Church	Gloucester	Winter Relief Grant	500
St. James	Groveland	Winter Relief Grant	500
Christ Church	Harwich Port	Winter Relief Grant	500
Trinity	Haverhill	Winter Relief Grant	500
St. John the Evangelist	Hingham	Winter Relief Grant	500
St. John's Church	Hollbrook	Winter Relief Grant	500
St. Michael's Church	Holliston	Winter Relief Grant	500
Parish of Christ Church	Hyde Park	Winter Relief Grant	500
Ascension Memorial Church	Ipswich	Winter Relief Grant	500
St John's	Lowell	Winter Relief Grant	365
St Stephen's	Lynn	Winter Relief Grant	500
St Paul's Church	Lynnfield	Winter Relief Grant	500
St Paul's Church	Malden	Winter Relief Grant	500
St Michaels	Marblehead	Winter Relief Grant	500
Grace Church	Medford	Winter Relief Grant	500
Trinity Church	Melrose	Winter Relief Grant	500
St Andrew's	Methuen	Winter Relief Grant	500
Grace Episcopal Church	N. Attleboro	Winter Relief Grant	500
Christ Church	Needham	Winter Relief Grant	500
St Andrew's	New Bedford	Winter Relief Grant	500
St Mary's Church	Newton	Winter Relief Grant	500
Trinity Church	Newton	Winter Relief Grant	500
Grace Church	Norwood	Winter Relief Grant	500
St. Chrysostom's	Quincy	Winter Relief Grant	500
Christ Church	Quincy	Winter Relief Grant	500
Trinity Church	Randolph	Winter Relief Grant	500
St Mary's Church	Rockport	Winter Relief Grant	500
St. Cyprian's	Roxbury	Winter Relief Grant	500
Christ Church	S. Hamilton	Winter Relief Grant	500
St David's Church	S. Yarmouth	Winter Relief Grant	500
St. Luke's Church	Scituate	Winter Relief Grant	500
St James Church	Somerville	Winter Relief Grant	500
St Mark's Church	Southborough	Winter Relief Grant	500
All Saints' Church	Stoneham	Winter Relief Grant	500
Christ Church	Swansea	Winter Relief Grant	500
St Thomas' Church	Taunton	Winter Relief Grant	500
Trinity Church	Topsfield	Winter Relief Grant	500
All Saints Church	W. Newbury	Winter Relief Grant	500
Christ Church	Waltham	Winter Relief Grant	500
Church of the Good Shepherd	Watertown	Winter Relief Grant	500
St. Mark's Church	Westford	Winter Relief Grant	500
St. Peter's Church	Weston	Winter Relief Grant	500
St John's Church	Westwood	Winter Relief Grant	500
Parish of the Epiphany	Winchester	Winter Relief Grant	500
Church of the Messiah	Woods Hole	Winter Relief Grant	500
Trinity Church	Wrentham	Winter Relief Grant	500
Episcopal Relief and Endowment		Winter Relief Grant	11,700
			<u>45,065</u>
Bishops' Funds			
Clergy Children College Scholarships	22 students		44,700
Society for the Relief of Aged or Disabled Clergy	Served 37 clergy		111,150
Society for the Relief of Widows, Widowers and Orphans of Clergy	Served 38 widows		74,224
		TOTAL GRANTS \$	804,206
Stokes Fund Loans			
85 Loans			2,255,111
	2 Loans	2-8 months in arrears	
	5 Loans	9+ months in arrears	
	78 Loans	Current	

2016 DIOCESAN STAFF POSITIONS BY AREA

Position	Incumbent
DEANERIES, CONGREGATIONS & CLERGY	
Canon for Congregations	The Rev. Canon Elizabeth Berman
Senior Consultant for Congregations	Mr. Lawrence Civale
Administrative Assistant	Mr. Andrew Del Pilar
Canon for Ordained Vocations	The Rev. Canon Edie Dolnikowski
Program Director for Mission Hubs	Ms. Jin Min Lee
Director for Transition Ministries	The Rev. Jean Baptiste Ntagengwa
Administrative assistance	Ms. Suzette Phillips
Administrative assistance (Commission on Ministry)	The Ven. Patricia Zifcak
CONGREGATIONAL RESOURCES & TRAINING	
Missioner for Christian Education, Formation and Discipleship	Ms. Amy Cook
Communications Assistant	Ms. Ellen Stuart Kittle
Director of Congregational Resources and Training	The Rev. Karen Montagno
Director of Communications	Ms. Tracy Sukraw
Grants Administrator	Ms. Lauren Zook
Hispanic Missioner	Vacancy
STRATEGIC MINISTRIES	
Executive Director, Life Together	Ms. Kelsey Rice Bogdan
Vicar, St. Stephen's Church, Boston	The Rev. Timothy Crellin
Director of Operations, Life Together	Ms. Kendyll Hillegas
Chaplain, MIT	The Rev. Thea Keith-Lucas
Canon for Asiamerican Ministries	The Rev. Canon Connie Ng Lam
Youth Ministry Administrator	Mr. Sam Lovett
Chaplain, Boston University	The Rev. Cameron Partridge
Director, Youth Ministry	The Rev. H. Mark Smith
Chaplain, Boston College & Northeastern	The Rev. Judith Stuart
Project Director for Global Mission	Ms. Laura Walta
EPISCOPAL AND DIOCESAN SUPPORT	
Bishop	The Rt. Rev. Alan M. Gates
Bishop Suffragan	The Rt. Rev. Gayle E. Harris
Director of Development	Mr. Lynd Matt
Canon to the Ordinary	The Rev. Canon William Parnell
Executive Assistant to Bishop Gates	Ms. Diane Pound
Acting Chief of Staff	The Rev. Samuel Rodman
Administrative Assistant to Bishop Harris	Ms. Marsha Searle
Administrator, Convention and Council	Ms. Laura Simons
Development Assistant	Ms. Casey Zierler

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2016 DIOCESAN STAFF POSITIONS BY AREA	
Position	Incumbent
ADMINISTRATIVE SERVICES	
Manager, Human Resources	Ms. Cindy Cushman
Accountant	Ms. Marilyn Govoni
Controller	Mr. Charles Jordan
Coordinator for Congregational Properties	Mr. Stephen Pierce
Manager, Information Technology	Mr. Jamie Reamer
Chief Business Officer and Assistant Treasurer	Mr. Gerry Sullivan
Accountant	Ms. Patricia Superville
Archivist	Vacancy

The Protestant Episcopal Diocese of Massachusetts

Financial Report
December 31, 2015 and 2014

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RSM US LLP

Independent Auditor's Report

The Protestant Episcopal Diocese of Massachusetts
Boston, Massachusetts

Report on the Financial Statements

We have audited the accompanying financial statements of The Protestant Episcopal Diocese of Massachusetts (the "Diocese") which comprise the statements of financial position as of December 31, 2015 and 2014, and the related statements of activities, and cash flows for the years then ended and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Protestant Episcopal Diocese of Massachusetts as of December 31, 2015 and 2014, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

RSM US LLP

Boston, Massachusetts
November 28, 2016

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The Protestant Episcopal Diocese of Massachusetts

Statements of Financial Position
December 31, 2015 and 2014

	2015	2014
Assets		
Cash and cash equivalents	\$ 2,487,863	\$ 3,543,559
Assessments receivable, less allowance for uncollectible assessments of \$250,000 and \$315,835 as of December 31, 2015 and 2014, respectively	552,754	605,438
Dividends and interest receivable	586,832	350,095
Prepaid expenses and other current assets	47,537	41,652
Due from affiliated entities	319,052	287,781
Pledges receivable, restricted, net	5,466,259	8,178,577
Mortgages and notes receivable, affiliated entities, net of allowance	3,386,268	3,287,640
Restricted cash	2,459,301	2,733,424
Investments	33,975,784	35,956,037
Beneficial interest in perpetual trusts	31,549,969	33,135,087
Interests in charitable remainder trusts	538,228	564,807
Pooled income fund	7,857	8,733
Property, buildings and equipment, net	5,125,874	4,061,644
Total assets	\$ 86,503,578	\$ 92,754,474
Liabilities and Net Assets		
Liabilities:		
Accounts payable and accrued expenses	\$ 573,827	\$ 696,176
Due to parishes and other entities from capital campaign, net	2,638,575	4,779,783
Funds held for other beneficiaries and affiliated entities	4,755,598	5,407,278
Total liabilities	7,968,000	10,883,237
Net assets:		
Unrestricted:		
Designated by Diocesan Council - quasi endowment	9,873,618	9,465,962
Designated by Diocesan Council - specified purposes	280,672	342,567
Undesignated surplus	6,688,378	7,028,796
	16,842,668	16,837,325
Temporarily restricted	18,386,711	19,976,870
Permanently restricted	43,306,199	45,057,042
Total net assets	78,535,578	81,871,237
	\$ 86,503,578	\$ 92,754,474

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts

Statements of Activities

Years Ended December 31, 2015 and 2014

	2015				2014			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Operating								
Revenues, support and other income:								
Support from congregations	\$ 4,935,397	\$ -	\$ -	\$ 4,935,397	\$ 4,956,147	\$ -	\$ -	\$ 4,956,147
Gifts, grants and fees	1,841,850	686,627	-	2,528,477	3,451,380	1,051,533	-	4,502,913
Investment income:								
Distributed under Diocesan spending policy	259,376	614,663	-	874,039	313,236	567,561	-	900,797
Distributed from DIT trust funds	1,043,199	385,505	-	1,428,704	979,924	345,875	-	1,325,799
Other	93,245	-	-	93,245	112,808	-	-	112,808
Designated funds made available by Diocesan Council	155,001	-	-	155,001	1,175,102	-	-	1,175,102
Contributed services	360,000	-	-	360,000	360,000	-	-	360,000
Net assets released from restrictions	3,638,673	(3,638,673)	-	-	2,540,389	(2,540,389)	-	-
Total revenues, support and other income	12,326,741	(1,951,878)	-	10,374,863	13,888,986	(555,420)	-	13,333,566
Expenses:								
Support to Episcopal Church	966,300	-	-	966,300	910,139	-	-	910,139
Deaneries, congregations and clergy	1,039,602	-	-	1,039,602	987,551	-	-	987,551
Congregational resources and training	1,079,395	-	-	1,079,395	1,159,599	-	-	1,159,599
Strategic ministries	4,172,734	-	-	4,172,734	5,160,939	-	-	5,160,939
Episcopal and diocesan support	1,414,498	-	-	1,414,498	1,628,597	-	-	1,628,597
Administrative services	1,512,352	-	-	1,512,352	1,374,376	-	-	1,374,376
Bishop's discretionary expenses	626,376	-	-	626,376	506,547	-	-	506,547
Contributed services	360,000	-	-	360,000	360,000	-	-	360,000
Bad debt expense (recovery)	196,746	-	-	196,746	(2,014)	-	-	(2,014)
Depreciation	209,517	-	-	209,517	229,691	-	-	229,691
Total expenses	11,577,520	-	-	11,577,520	12,315,425	-	-	12,315,425
Increase (decrease) in net assets from operations	749,221	(1,951,878)	-	(1,202,657)	1,573,561	(555,420)	-	1,018,141
Non operating								
Other income, gains (expenses) and (losses):								
Net revolving loan fund interest	-	-	48,610	48,610	-	-	59,102	59,102
Investment (losses) income on endowment investments, net of spending policy	(304,110)	(733,478)	(186,880)	(1,224,468)	235,053	409,538	154,880	799,471
Designated funds made available by Diocesan Council	(155,001)	-	-	(155,001)	(1,175,102)	-	-	(1,175,102)
Contributions - capital campaign	-	1,095,197	-	1,095,197	-	776,461	-	776,461
Capital campaign expenses	(101,166)	-	-	(101,166)	(203,855)	-	-	(203,855)
Gain (loss) on disposal of property, buildings and equipment	7,187	-	-	7,187	(4,636)	-	-	(4,636)
Gain (loss) from sale of property from closed parishes	135,661	-	-	135,661	(103,114)	-	-	(103,114)
Change in value of beneficial interest in trusts	-	-	(1,612,573)	(1,612,573)	-	-	901,805	901,805
Other investment losses	(5,474)	-	-	(5,474)	(16,460)	-	-	(16,460)
Other income (expense), net	(320,975)	-	-	(320,975)	(289,967)	-	-	(289,967)
Total other income, gains, (expenses) and (losses)	(743,878)	361,719	(1,750,843)	(2,133,002)	(1,556,081)	1,186,019	1,115,787	743,725
Change in net assets	5,343	(1,590,159)	(1,750,843)	(3,335,659)	15,480	630,599	1,115,787	1,761,866
Net assets at beginning of year	16,837,325	19,976,870	45,057,042	81,871,237	16,821,845	19,346,271	43,941,255	80,109,371
Net assets at end of year	\$ 16,842,668	\$ 18,386,711	\$ 43,306,199	\$ 78,535,578	\$ 16,837,325	\$ 19,976,870	\$ 45,057,042	\$ 81,871,237

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts

Statements of Cash Flows

Years Ended December 31, 2015 and 2014

	2015	2014
Cash flows from operating activities:		
Change in net assets	\$ (3,335,659)	\$ 1,761,866
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation	209,517	229,691
Recovery of doubtful pledges receivable	303,053	421,973
(Gain) loss on sale of property from closed parishes	(135,661)	103,114
Realized and unrealized investment losses (gains)	676,509	(1,405,576)
(Gain) loss on disposal of property, buildings and equipment	(7,187)	4,636
Donated securities	(418,701)	(671,380)
Proceeds from sale of donated securities	418,701	671,380
Net provision (recovery) for mortgage notes receivable allowance	90,000	(43,138)
Changes in operating assets and liabilities:		
Assessments receivable	52,684	(64,755)
Dividends and interest receivable	(236,737)	(18,459)
Pledges receivable	2,409,265	3,387,693
Due from affiliated entities	104,390	(33,617)
Prepaid expenses and other current assets	(5,885)	9,757
Accounts payable and accrued expenses	(122,349)	148,071
Due to parishes and other entities from capital campaign	(2,141,208)	(4,643,323)
Change in funds held for other beneficiaries and affiliated entities	(651,680)	51,192
Net cash used in operating activities	(2,790,948)	(90,875)
Cash flows from investing activities:		
Net decrease in restricted cash	274,123	2,117,311
Additions to property, buildings and equipment	(1,436,560)	(9,180)
Mortgage loans granted, net of repayments	(192,557)	(11,354)
Loans issued from Stokes Fund	(394,959)	(327,101)
Payments received on Stokes Fund loans	398,888	353,275
Proceeds from sale of property, buildings and equipment	170,000	-
Proceeds from sale of property from closed parishes	-	93,119
Purchases of investments	(1,967,170)	(1,255,844)
Sales of investments	3,270,914	1,693,769
Change in split-interest agreements	1,612,573	(901,805)
Net cash provided by investing activities	1,735,252	1,752,190
Cash flows from financing activities:		
Payments on capital lease obligations	-	(19,670)
Net (decrease) increase in cash and cash equivalents	(1,055,696)	1,641,645
Cash and cash equivalents, beginning of year	3,543,559	1,901,914
Cash and cash equivalents, end of year	\$ 2,487,863	\$ 3,543,559
Supplemental disclosure on non cash flow information:		
Cash paid during the year for interest	\$ -	\$ 2,312

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies

Organization: The Protestant Episcopal Diocese of Massachusetts (the "Diocese") was established in 1784 and is among the largest dioceses in terms of membership in the Episcopal Church. The Diocese is governed by an elected Bishop advised by Diocesan Council.

Basis of presentation: The financial statements of the Diocese have been prepared on the accrual basis of accounting and in accordance with accounting standards set by the Financial Accounting Standards Board (FASB). The FASB sets generally accepted accounting principles (GAAP) to ensure financial condition, results of operations, and cash flows are consistently reported. References to GAAP issued by the FASB in these footnotes are to the FASB Accounting Standards Codification (ASC).

The Diocese's financial statement presentation follows the recommendations of FASB ASC 958, "Financial Statements of Not-for-Profit Organizations" (FASB ASC 958). Under ASC 958, the Diocese is required to report information regarding its financial position and activities according to three classes of net assets, determined by donor-imposed restrictions, as follows:

Unrestricted net assets: Unrestricted net assets represent a portion of net assets of the Diocese that is neither permanently restricted nor temporarily restricted by donor imposed stipulations. Unrestricted net assets include expendable funds available for support of the Diocese as well as funds invested in property, buildings and equipment. In addition, unrestricted net assets of the Diocese include funds which represent unrestricted resources designated by the Diocesan Council for quasi endowment or specified purposes.

Temporarily restricted net assets: Temporarily restricted net assets represent contributions and other inflows of assets whose use by the Diocese is limited by donor-imposed stipulations that either expire by the passage of time or can be fulfilled and removed by actions of the Diocese pursuant to those stipulations. Temporarily restricted net assets also include, under Massachusetts law, amounts, representing cumulative interest, dividends, appreciation and reinvested gains on permanently restricted endowment funds, which are subject to prudent appropriation by the Board in accordance with donor use restrictions and provisions of Massachusetts law but which have not yet been appropriated by the Diocesan Council.

Permanently restricted net assets: Permanently restricted net assets represent contributions and other inflows of assets whose use by the Diocese is limited by donor-imposed stipulations that neither expire by the passage of time nor can be fulfilled and removed by actions of the Diocese pursuant to these stipulations.

Accounting estimates: The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect certain reported amounts of assets and liabilities, revenues, support and expenses, and the disclosure of contingent assets and liabilities. The more significant items presented herein affected by the use of estimates are the allowances for uncollectible assessment receivables and pledges receivable, discount on pledges receivable and depreciable lives of buildings and equipment. Actual results could differ from those estimates.

Liquidity: In order to provide information about liquidity, assets are sequenced according to their nearness of conversion to cash and liabilities according to their nearness to their estimated maturity.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

Contributions: The Diocese reports gifts of cash and other assets as restricted support if they are donor-restricted as to purpose or time. When a donor restriction expires, that is when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statements of activities as net assets released from restrictions. Contributions subject to donor-imposed restrictions met in the same reporting period as they are received are reported as temporarily restricted revenues and then released from restriction.

The Diocese reports gifts of land, buildings and equipment at fair value as unrestricted support unless explicit donor stipulations specify how the donated assets must be used. Gifts of long-lived assets with explicit restrictions that specify how the assets are to be used are reported as restricted support. Absent explicit donor stipulations about how long those long-lived assets must be maintained, the Diocese reports expirations of donor restrictions in the period the asset is sold.

Contributions, including unconditional promises to give, are initially recognized as revenues at fair value in the period the promise is received. Conditional promises to give are not recognized until they become unconditional, that is, at the time when the conditions on which they depend are substantially met. Contributions of assets other than cash are reported at their estimated fair value. Contributions to be received after one year are discounted at an appropriate discount rate commensurate with the risk involved. Amortization of discount is recorded as additional contribution revenue in accordance with donor-imposed restrictions, if any, on the contributions.

An allowance for uncollectible contributions receivable is provided based upon management's judgment of potential defaults. The determination includes such factors as prior collection history, type of contribution and nature of fund raising activity. Accounts are charged against the allowance when management believes that the collectability of the specific accounts is unlikely.

Beneficial interest in charitable trusts: The Diocese is the beneficiary of a number of charitable trusts (split interest agreements), which are included in beneficial interest in perpetual trusts or interests in charitable remainder trusts on the statement of financial position. The Diocese initially recognizes a contribution as well as an interest in the underlying investment from which a specified amount or percentage of the fair value of the trusts' assets or income each year is currently being paid to the Diocese (perpetual trust) or to the donor or named beneficiary (remainder trust).

Actuarial methods are used to calculate that portion of the investment representing the present value of the liability to the beneficiary and that portion representing the contribution.

For agreements and trust assets maintained by an outside trustee, the Diocese includes in the beneficial interest in charitable trusts the value of the estimated future benefits. Adjustments to reflect the changes in the fair value of the investments, revaluation of the present value of the estimated future payments to the donors and or donors' stated beneficiaries, and changes in actuarial assumptions during the term of the trust are made to the related assets and are recognized as changes in the value of split interest agreements in their respective net asset classes.

Endowment and diocesan council designated endowment funds: The Diocese follows FASB ASC 958, regarding the classification of donor-restricted endowment funds subject to the Uniform Prudent Management of Institutional Funds Act (UPMIFA). This standard provides guidance on the net asset classification of donor-restricted endowment funds for a not-for-profit organization that is subject to an enacted version of UPMIFA. UPMIFA is a model act approved by the Uniform Law Commission that serves as a guideline for states to use in enacting legislation. This position also requires disclosures about an organization's endowment funds (both donor-restricted endowment funds and board-designated endowment funds), whether or not the organization is subject to UPMIFA.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

The Diocese has interpreted UPMIFA as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Diocese classifies as permanently restricted net assets (a) the original value of gifts donated, (b) the original value of subsequent gifts and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Diocese in a manner consistent with the standard of prudence prescribed in UPMIFA.

In accordance with UPMIFA, the Diocese considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- The duration and preservation of the fund
- The purposes of the Diocese and the donor-restricted endowment fund
- General economic conditions
- The possible effect of inflation and deflation
- The expected total return from income and the appreciation of investments
- Other resources of the Diocese
- The investment policies of the Diocese

Cash and cash equivalents: The Diocese considers cash and cash equivalents to include all highly-liquid investments (other than those held for long term purposes) with original maturity dates of less than three months. The Diocese maintains some of its cash in bank deposit accounts, which at times may exceed federally insured limits. The Diocese has not experienced any losses in such accounts. The Diocese believes it is not exposed to any significant credit risk on cash and cash equivalents.

Restricted cash: Restricted cash at December 31, 2015 and 2014 includes approximately \$2.5 million and \$2.7 million, respectively, designated by the Diocesan Council related to proceeds from closed parishes for future consideration, capital campaign contributions received and not spent, and distributions owed to beneficiaries.

Receivables: Assessments receivable, mortgages receivable, and notes receivable are stated net of allowances for doubtful accounts, when necessary, and are reported on the face of the Diocese's statements of financial position or in the notes to the financial statements. The allowances are established via provisions for bad debts charged to operations. On a periodic basis, management evaluates its receivables and establishes or adjusts its allowances to amounts that it believes will be adequate to absorb possible losses on accounts that may become uncollectible based on evaluations of the collectability of individual accounts, the Diocese's history of prior loss experience and on current economic conditions. Accounts are charged against the allowances when management believes that the collectability of the specific accounts are unlikely.

Mortgages receivable and notes receivable are placed on nonaccrual status when management believes, after considering economic conditions, business conditions, and collection efforts that loans are impaired or collection of interest is doubtful. Uncollected interest previously accrued is charged off or an allowance is established by a charge to interest income. Interest income on nonaccrual loans is recognized only to the extent cash payments are received. Loans are classified as nonperforming, and considered impaired when they are over 90 days past due. Generally, loans are restored to performing status when the obligation is brought current, has performed in accordance with the contractual terms for a reasonable period of time and the ultimate collectability of the total contractual principal and interest is no longer in doubt.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

Interest earned on mortgage notes receivable is recognized over the term of the mortgage note and is calculated using the simple interest method on principal amounts outstanding.

Grants: The Diocesan Council makes grants to organizations for various charitable purposes, principally within the Diocese of Massachusetts. Grants are recorded as expense in the period when the commitment is made.

Contributed services: Support arising from contributed services to the Diocese has been recognized at estimated fair value in the accompanying financial statements with an equal amount recognized as expense, if the services provided require special skills and would need to be purchased by the Diocese if not contributed. The computation of the value of the contributed services represents the estimated comparable compensation that would be paid to persons if they were employees.

Property, buildings and equipment: Property, buildings, building improvements and equipment are carried at historical cost less accumulated depreciation. Depreciation on buildings, building improvements and equipment is charged as a non-operating expense. Depreciation is computed using the straight-line method over the estimated useful lives of buildings, generally 40 to 50 years, building improvements, 20 years, and equipment, 3 to 5 years. Betterments, renewals and extraordinary repairs that extend the life of the asset are capitalized; other repairs and maintenance are expensed.

Asset retirement obligation: The Diocese follows FASB ASC 410, "Asset Retirement and Environmental Obligations"; this standard requires a liability be recorded at fair value specific to certain legal environmental obligations. The recording of a liability is required if such conditions exist and the obligation can be reasonably estimated. As of December 31, 2015 and 2014, the Diocese is unaware of any such obligations. The Diocese will recognize a liability in the period in which it becomes aware of such liability and sufficient information is available to reasonably estimate the fair value.

Impairment of long-lived assets: Long-lived assets, which consist primarily of property, buildings, and equipment, are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount of the asset may not be recoverable. When such events occur, the Diocese compares the carrying amounts of the assets to the undiscounted expected future cash flows over the remaining life of the asset. If this comparison indicates that there may be impairment, the amount of impairment is calculated as the difference between the carrying value and fair value. During the fiscal years ended December 31, 2015 and 2014, no impairment indicators were identified.

Non-operating activities: Non-operating activities reflect transactions that involve long-term investment or are capital in nature. This includes net revolving loan fund interest, investment income on endowment investments (net of spending policy), designated funds made available by Diocesan Council, capital campaign contributions and expenses, gains and losses on sale from closed parishes, gains and losses on disposal of property, buildings and equipment, change in value of beneficial interests, other investment income and losses, and other income and expenses.

Support from congregations: The Diocese receives support from parishes and missions in the form of assessment payments. Assessment payments are mandatory for parishes as part of their agreement with the Diocese.

Designated funds made available from the diocesan council: Designated funds made available from the Diocesan Council represent funds expended from the Diocese's non-endowment funds that are designated for specified purposes by the Diocesan Council. These funds are created from the net proceeds realized from church closings.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

Investment policy: The Diocese has adopted an investment policy for its endowment funds with an asset allocation of 50% to 70% of portfolio value in stock and equivalents with a target of 60% and 30% to 50% of portfolio value in fixed income with a target of 40%. Movements within the ranges will be based on periodic assessment of the relative valuation of the different asset classes, as well as economic outlook. The Diocesan Council can authorize exceptional moves outside the range. As of December 31, 2015 and 2014, the custodian for the majority of the Diocese's investments was the Diocesan Investment Trust (DIT). The investments were invested in the DIT's Stock Fund, Income Fund, and Fossil Fuel Free Stock Fund.

The investment performance of the Stock Fund is expected to rank consistently in the top half of the Independent Consultants Cooperative (ICC) Global Equity Funds Universe, while the investment performance of the Income Fund is expected to rank consistently in the top half of the ICC Fixed Income Universe. The performance of the Fossil Fuel Free fund is expected to remain within 30 basis points (plus or minus) of that of its blended benchmark. The performances of managers hired to administer particular Stock Fund and the Income Fund portfolios are evaluated against the performances of other managers with similar styles and benchmarks. Actively managed portfolios are expected regularly to outperform their benchmark indices – e.g., a mid-cap value manager would be expected to outperform the Russell 2000 Value Index.

The investment policies attempt to provide a predictable stream of funding for its funds while seeking to maintain the purchasing power of endowment assets.

Spending policy: The Diocesan Council has established a spending policy for its endowment funds and those funds for which it is an income beneficiary. The policy establishes a target endowment income. The income used under the spending policy is netted against investment income in the statements of activities. Additionally, the policy establishes an upper and lower limit to keep the target responsive to changes in the market value of the endowment.

During 2015 and 2014, the upper limit was 5.5%, the lower limit was 3.5%, and the actual draw was 4% of the average three years' fair value of the endowment. Income earned under the policy in excess of targeted earnings is available for distribution under the policy should earned income be less than the target in subsequent years. Amounts earned in excess of the target are included in temporarily restricted net assets in the statements of activities. This is consistent with the Diocese's objective to maintain the purchasing power of the endowment assets held in perpetuity as well as to provide additional real growth through investment return.

Investments and investment income: Investments in equity securities and fixed income mutual funds with readily determinable fair market values and all investments in debt securities are reported at fair value and are based on quoted market prices.

Investment in real estate investment trust represents a real estate partnership which is reported at the lower of cost or market as the investment does not have a readily determinable fair value.

Investment in the DIT consists of investments in a stock fund, an income (bond) fund, and a fossil fuel free stock fund, which are reported at fair value using the Net Asset Value (NAV) as a practical expedient. The practical expedient allows net asset value per share to represent fair value for reporting purposes when the criteria for using this method are met.

Investment income and gains (losses) from unrestricted investments are reported as unrestricted revenue. Investment interest and gains (losses) on investments of temporarily restricted net assets are reported as increases (decreases) in temporarily restricted net assets. Investment income and gains (losses) on investments of permanently restricted net assets are reported as increases (decreases) in temporarily restricted net assets unless permanently restricted by the donor, in which case they are recorded as increases (decreases) in permanently restricted net assets.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

Investments, in general, are exposed to various risks, such as interest rate, credit, and overall market volatility. As such, it is reasonably possible that changes in the values of investments will occur in the near term and that such changes could materially affect the amounts reported in the statements of financial position and statements of activities and changes in net assets.

Advertising: The Diocese's policy is to expense advertising costs as incurred.

Income tax status: The Diocese is a tax exempt organization under Section 501(c)(3) of the Internal Revenue Code, which provides for the exemption of organizations that are organized and operated exclusively for religious, charitable, scientific, literary or educational purposes, and whose net earnings do not inure to the benefit of any private shareholder or individual.

Uncertainty of income taxes: The Diocese follows FASB ASC 740, "Income Taxes", which clarifies the accounting for uncertainty in income taxes by prescribing the recognition threshold a tax position is required to meet before being recognized in the financial statements. The Diocese recognizes a tax benefit from an uncertain tax position only if it is more likely than not that the tax position will be sustained on examination by taxing authorities. Management evaluated the Diocese's tax positions and concluded that the Diocese has no material uncertainties in income taxes.

The Diocese is no longer subject to income tax examinations by the U.S. federal, state, or local tax authorities for fiscal years before 2012. The Diocese will account for interest and penalties related to uncertain tax positions, if any, as part of tax expense.

Reclassifications: Certain reclassifications have been made to the 2014 financial statements to conform to the 2015 presentation.

Recent accounting pronouncements: In May 2014, the FASB issued ASU 2014-09, "Revenue from Contracts with Customers" (Topic 606), requiring an entity to recognize the amount of revenue to which it expects to be entitled for the transfer of promised goods or services to customers. The updated standard will replace most existing revenue recognition guidance in U.S. GAAP when it becomes effective and permits the use of either a full retrospective or retrospective with cumulative effect transition method. In August 2015, the FASB issued 2015-14, "Revenue from Contracts with Customers (Topic 606) Deferral of the Effective Date" and voted to delay the effective date of the proposed standard. The updated standard will be effective for annual reporting periods beginning after December 15, 2018, and interim periods with annual reporting periods beginning after December 15, 2019. The Diocese has not yet selected a transition method and is currently evaluating the effect that the updated standard will have on the financial statements.

In May 2015, the FASB has issued Accounting Standards Update 2015-07, "Fair Value Measurement (Topic 820): Disclosures for Investments in Certain Entities That Calculate Net Asset Value per Share (or Its Equivalent)". The amendments apply to reporting entities that elect to measure the fair value of an investment using the NAV per share (or its equivalent) practical expedient. The amendments remove the requirement to categorize within the fair value hierarchy all investments for which fair value is measured using the net asset value per share practical expedient. The amendments also remove the requirement to make certain disclosures for all investments that are eligible to be measured at fair value using the net asset value per share practical expedient. Rather, those disclosures are limited to investments for which the entity has elected to measure the fair value using that practical expedient. The amendments are effective for years ending December 31, 2017 and should be applied retrospectively to all periods presented. Earlier application is permitted. The Diocese has elected to apply these amendments within these financial statements.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

In February 2016, the FASB issued ASU 2016-02, "Leases (Topic 842)". The guidance in this ASU supersedes the leasing guidance in Topic 840, "Leases". Under the new guidance, lessees are required to recognize lease assets and lease liabilities on the statement of financial position for all leases with terms longer than 12 months. Leases will be classified as either finance or operating, with classification affecting the pattern of expense recognition in the statement of activities. The new standard is effective for fiscal years beginning after December 15, 2019, including interim periods within those years. The Diocese is in the process of evaluating the impact of this new guidance.

In August, 2016, the FASB issued Accounting Standards Update (ASU) No. 2016-14, "Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities". The amendments in this ASU make improvements to the information provided in financial statements and accompanying notes of not-for-profit entities. The amendments set forth the FASB's improvements to net asset classification requirements and the information presented about a not-for-profit entity's liquidity, financial performance, and cash flows. The ASU will be effective for fiscal years beginning after December 15, 2017. Earlier application is permitted. The changes in this ASU should generally be applied on a retrospective basis in the year that the ASU is first applied. Management has not yet evaluated the impact of this ASU on the financial statements.

In August 2016, FASB issued ASU 2016-15, "Statement of Cash Flows (Topic 230) Classification of Certain Cash Receipts and Cash Payments", which will make eight targeted changes to how cash receipts and cash payments are presented and classified in the statement of cash flows. ASU 2016-15 will be effective for fiscal years beginning after December 15, 2019, and will require adoption on a retrospective basis unless it is impracticable to apply, in which case we would be required to apply the amendments prospectively as of the earliest date practicable. The Diocese is currently evaluating the impact of this ASU on the financial statements and disclosures.

Note 2. Investments

As of December 31, 2015 and 2014 the Diocese had approximately 89% and 88% of its investments invested with DIT, an affiliated organization. DIT was established as an investment vehicle for the Diocese, as well as for parishes and other organizations within the Diocese. DIT is managed by Trustees of Donations to the Protestant Episcopal Church. The Diocese receives quarterly income distributions from DIT.

The Diocese's investments consist of the following at December 31:

	2015	2014
Diocesan investment trust - stock fund	\$ 11,984,967	\$ 20,907,231
Diocesan investment trust - income fund	10,165,382	10,951,891
Diocesan investment trust - fossil fuel free stock fund	7,924,862	-
Domestic equity securities	1,270,560	1,457,440
Real estate investment trust	35,883	35,074
Mutual funds	1,596,522	1,613,435
Bond funds	997,608	990,966
Total investments	<u>\$ 33,975,784</u>	<u>\$ 35,956,037</u>

The investment in the real estate investment trust is illiquid and is carried at adjusted cost at December 31, 2015 and 2014. As of December 31, 2015 and 2014, there were no unfunded commitments outstanding.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 2. Investments (Continued)

Investment return from these investments for the years ended December 31, 2015 and 2014 is summarized as follows:

	2015	2014
Non-endowment return:		
Realized and unrealized losses	\$ (5,474)	\$ (16,460)
Endowment return:		
Interest and dividends	\$ 510,198	\$ 464,483
Investment fees	(189,592)	(186,251)
Realized and unrealized (losses) gains	(671,035)	1,422,036
	(350,429)	1,700,268
Appropriation of spending policy	(874,039)	(900,797)
Investment income from endowment investments, net of spending policy	\$ (1,224,468)	\$ 799,471

Note 3. Fair Value Measurements

Under the FASB's authoritative guidance on fair value measurements, fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. In determining fair value, the Diocese uses various methods including market, income and cost approaches. Based on these approaches, the Diocese often utilizes certain assumptions that market participants would use in pricing the asset or liability, including assumptions about risk and or the risks inherent in the inputs to the valuation technique. These inputs can be readily observable, market corroborated, or generally unobservable. The Diocese utilizes valuation techniques that maximize the use of observable inputs and minimize the use of unobservable inputs. Based on the observability of the inputs used in the valuation techniques the Diocese is required to provide the following information according to the fair value hierarchy. The fair value hierarchy ranks the quality and reliability of the information used to determine fair values. Financial assets and liabilities carried at fair value will be classified and disclosed in one of the following three categories:

- Level 1:** Quoted prices for identical assets and liabilities traded in active exchange markets, such as the New York Stock Exchange.
- Level 2:** Observable inputs other than Level 1 including quoted prices for similar assets or liabilities, quoted prices in less active markets, or other observable inputs that can be corroborated by observable market data. Level 2 can also include derivative contracts whose value is determined using a pricing model with observable market inputs or can be derived principally from or corroborated by observable market data.
- Level 3:** Unobservable inputs supported by little or no market activity for financial instruments whose value is determined using pricing models, discounted cash flow methodologies, or similar techniques, as well as instruments for which the determination of fair value requires significant management judgment or estimation; also includes observable inputs for nonbinding single dealer quotes not corroborated by observable market data.

In some instances, the inputs used to measure fair value may fall into different levels of the fair value hierarchy. In such instances, the inputs are based on the lowest level of input that is significant to the fair value measurement.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements (Continued)

During the year ended December 31, 2015 and 2014, there were no changes to the Diocese's valuation techniques that had, or are expected to have, a material impact on its statements of financial position or statements of activities.

The Diocese has various process and controls in place to ensure that fair value is reasonably estimated.

While the Diocese believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different estimate of fair value at the reporting date.

The following is a description of the valuation methodologies used for instruments measured at fair value:

Equity securities, mutual funds, and bond funds: The fair value of equity securities, mutual funds, and bond funds is the market value based on quoted market prices, when available, or market prices provided by recognized broker dealers. If listed prices or quotes are not available, fair value is based upon externally developed models that use unobservable inputs due to the limited market activity of the instrument.

Interests in charitable remainder trusts and pooled income fund: The fair value of interests in charitable remainder trusts and the pooled income fund is based on quoted market prices and present value techniques using a discount rate of 3.90% at December 31, 2015 and 2014.

The following table summarizes the valuation of the Diocese's assets measured at fair value on a recurring basis by the fair value hierarchy levels as of December 31:

	2015				Total
	Quoted Prices in Active Markets Level 1	Other Observable Inputs Level 2	Unobservable Inputs Level 3	Other Investments Measured at Net Asset Value (a)	
Investments:					
Diocesan Investment Trust Stock Fund	\$ -	\$ -	\$ -	\$ 11,984,967	\$ 11,984,967
Diocesan Investment Trust Income Fund	-	-	-	10,165,382	10,165,382
Diocesan Investment Trust Fossil Fuel Free Fund	-	-	-	7,924,862	7,924,862
Domestic equity securities	1,270,560	-	-	-	1,270,560
Mutual funds	1,596,522	-	-	-	1,596,522
Bond funds	997,608	-	-	-	997,608
	3,864,690	-	-	30,075,211	33,939,901
Beneficial interest in perpetual trusts	-	-	-	31,549,969	31,549,969
Pooled income fund	7,857	-	-	-	7,857
Interests in charitable remainder trusts	-	-	538,228	-	538,228
	\$ 3,872,547	\$ -	\$ 538,228	\$ 61,625,180	\$ 66,035,955
Total investments at fair value	\$ 33,939,901				
Real estate investment trust	35,883				
Total investments	\$ 33,975,784				

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements (Continued)

	2014					Total
	Quoted Prices in Active Markets Level 1	Other Observable Inputs Level 2	Unobservable Inputs Level 3	Other Investments Measured at Net Asset Value (a)		
Investments:						
Diocesan Investment Trust Stock Fund	\$ -	\$ -	\$ -	\$ 20,907,231		\$ 20,907,231
Diocesan Investment Trust Income Fund	-	-	-	10,951,891		10,951,891
Domestic equity securities	1,457,440	-	-	-		1,457,440
Mutual funds	1,613,435	-	-	-		1,613,435
Bond funds	990,966	-	-	-		990,966
	<u>4,061,841</u>	<u>-</u>	<u>-</u>	<u>31,859,122</u>		<u>35,920,963</u>
Beneficial interest in perpetual trusts	-	-	-	33,135,087		33,135,087
Pooled income fund	8,733	-	-	-		8,733
Interests in charitable remainder trusts	-	-	564,807	-		564,807
	<u>\$ 4,070,574</u>	<u>\$ -</u>	<u>\$ 564,807</u>	<u>\$ 64,994,209</u>		<u>\$ 69,629,590</u>
Total investments at fair value	\$ 35,920,963					
Real estate investment trust	35,074					
Total investments	<u>\$ 35,956,037</u>					

The changes in beneficial interests in perpetual trusts and interests in charitable remainder trusts measured at fair value for which the Diocese has used Level 3 inputs to determine fair value is as follows at December 31:

	2015	2014
Balance, beginning of year	\$ 564,807	\$ 566,254
Change in value of beneficial interest in trusts	(26,579)	(1,447)
Balance, end of year	<u>\$ 538,228</u>	<u>\$ 564,807</u>

(a) In accordance with ASC Subtopic 820-10, certain investments that are measured at fair value using the NAV per share (or its equivalent) practical expedient have not been classified within the fair value hierarchy. The fair value amounts presented in this table are intended to permit reconciliation of the fair value hierarchy to amounts presented in the statements of financial position.

The following table presents quantitative information about Level 3 fair value measurements as of December 31:

	Fair Value 2015	Valuation Technique	Level 3 Unobservable Input	Range of Inputs
Interests in charitable remainder trusts	<u>\$ 538,228</u>	Value of underlying assets and present value techniques	Rate of Return Discount Rate Life Expectancy	5% 3.90% 3.56-4.28 years

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements (Continued)

	Fair Value 2014	Valuation Technique	Level 3 Unobservable Input	Range of Inputs
Interests in charitable remainder trusts	\$ 564,807	Value of underlying assets and present value techniques	Rate of Return Discount Rate Life Expectancy	5% 3.90% 2.21-5.22 years

The Diocese uses the NAV to determine the fair value of all the underlying investments, which (a) do not have a readily determinable fair value and (b) prepare their financial statements consistent with the measurement principles of an investment company. The following table lists investments in investment companies by major category:

	2015 NAV in Funds	2014 NAV in Funds	Number of Funds	Redemption Frequency	Redemption Restrictions
Diocesan Investment Trust Stock Fund (a)	\$ 11,984,967	\$ 20,907,231	1	Quarterly	Monthly
Diocesan Investment Trust Income Fund (b)	10,165,382	10,951,891	1	Quarterly	Monthly
Diocesan Investment Trust Fossil Fuel Free Fund (c)	7,924,862	-	1	Quarterly	Monthly
Beneficial interest in perpetual trusts (a) (b)	31,549,969	33,135,087	2	Illiquid*	N/A
	<u>\$ 61,625,180</u>	<u>\$ 64,994,209</u>	<u>5</u>		

- (a) The fund was established to offer a professionally managed investment vehicle within the equity markets and is expected to fluctuate in value over shorter-term horizons, but to provide superior real (after inflation) growth of principle over longer-term horizons. Total return for the fund shall consistently rank in the top half of the Independent Consultants (ICC) Equity Specialty Fund Universe.
- (b) The purpose of the fund is to provide a consistent high level of income over time similar to what may be produced in the broadly defined investment grade taxable bond markets. The fund is expected to earn, net of fees, above the Citicorp Broad Investment Grade (BIG) Index, and to consistently rank in the top half of the ICC Fixed Income Universe.
- (c) The purpose of the fund is to provide a consistent high level of income over time similar to what may be produced in the broadly defined investment grade taxable bond markets. The fund is expected to remain within 30 basis points (plus or minus) of that of its blended benchmark.

* These assets are held by a third-party trustee. The Diocese only receives distributions in accordance with associated trust documents, but has no control over the assets.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 4. Mortgages Receivable and Notes Receivable, Affiliated Entities

Mortgages receivable and notes receivable are due from various affiliated organizations and are collateralized by the real estate and consist of the following at December 31:

	2015	2014
Performing loans	\$ 3,273,819	\$ 3,118,136
Nonperforming loans	230,551	197,606
	<u>3,504,370</u>	<u>3,315,742</u>
Less allowance for doubtful accounts	(118,102)	(28,102)
	<u>\$ 3,386,268</u>	<u>\$ 3,287,640</u>

Performing loans are those which are less than 90 days past due. Nonperforming loans are those which are greater than or equal to 90 days past due.

The aging of the mortgages receivable and notes receivable as of December 31 is presented as follows:

	Total	Current	1-60 Days	60-90 Days	90+ Days Past Due
2015	<u>\$ 3,504,370</u>	<u>\$ 3,047,937</u>	<u>\$ 200,855</u>	<u>\$ 25,027</u>	<u>\$ 230,551</u>
2014	<u>\$ 3,315,742</u>	<u>\$ 3,118,136</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 197,606</u>

Changes in allowance for doubtful accounts on mortgage notes receivable during years ended December 31 is presented as follows:

	2015	2014
Balance, beginning	\$ 28,102	\$ 71,240
Increase in allowance for doubtful accounts	90,000	-
Loans charged off	-	(43,138)
Balance, ending	<u>\$ 118,102</u>	<u>\$ 28,102</u>

Included in mortgage notes receivable are mortgages of the Stokes Fund, a permanently restricted net asset revolving loan fund, which provides interest-bearing loans to parishes and affiliated organizations for capital improvements and repairs. At December 31, 2015 and 2014, Stokes Fund loans outstanding of \$2,533,158 and \$2,537,086, respectively, bear interest at rates ranging from 3.5% to 3.75% and mature at various dates through 2030. The recorded allowance for uncollectible loans in the Stokes Fund totaled \$10,000 at December 31, 2015 and 2014.

The following Stokes loans were made during 2015:

Trinity Church - Wrentham	\$ 82,000
St. James Church - Groveland	20,349
St. James Church - Somerville	33,525
Church of Our Redeemer - Lexington	100,000
St. John's Church - Holbrook	90,000
Trinity Church - Bridgewater	69,085
	<u>\$ 394,959</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 4. Mortgages Receivable and Notes Receivable, Affiliated Entities (Continued)

The following Stokes loans were made during 2014:

St. James Church - Cambridge	\$ 15,000
St. Peter's Church - Cambridge	48,351
St. Martin's Church – New Bedford	63,750
St. Andrew's Church – New Bedford	100,000
Church of St. Mary of the Harbor - Provincetown	100,000
	<u>\$ 327,101</u>

The Diocese has granted mortgage notes collateralized by real estate, principally from board-designated, unrestricted net assets, to certain clergy on the staff of the Diocese and to nine congregations totaling approximately \$971,000 and \$779,000 as of December 31, 2015 and 2014, respectively. These loans bear interest from 2.5% to 5.5% and mature at various dates through 2039.

Note 5. Pledges Receivable, Restricted

During 2011, the Diocese commenced their Together Now capital campaign with the goal of raising \$20 million from donors and is acting as an agent relative to certain initiatives where funds are being raised for the benefit of certain parishes and other entities affiliated with the Diocese. Under the plan of the campaign, the Diocese intends on using the net monies raised and collected to fund various strategic initiatives in accordance with the following percentage breakdown:

Equipping congregations for strategic local mission	45%
	20% up to a maximum of \$4,000,000
Transforming the Cathedral Church of St. Paul	10%
Tithing for mission beyond the Diocese	10%
Environmental initiatives	10% up to a maximum of \$2,000,000
Endowing the Barbara C. Harris Center	5%
Establishing a mission institute	

Parish participation is primarily through means of a collaborative campaign whereby congregations are able to raise funds for their own capital or programmatic needs while supporting the diocesan campaign. The parish collaborative campaign is managed by a consultant from the campaign office with no out-of-pocket costs to the parish. The diocese will receive 30% of all funds collected and the parish will receive the remaining 70% less a 3% charge for administration of pledge processing.

At December 31, 2015 and 2014, the Diocese owed \$2,638,575 and \$4,779,783, respectively, to parishes and other entities from funds raised through the Together Now capital campaign.

Pledges receivable consist of the following as of December 31:

	2015	2014
Pledges receivable:		
In one year or less	\$ 2,869,696	\$ 2,908,288
Between one and five years	3,339,105	6,331,041
	<u>6,208,801</u>	<u>9,239,329</u>
Less discount to net present value	(121,662)	(136,819)
Less allowance for estimated uncollectible pledges	(620,880)	(923,933)
	<u>\$ 5,466,259</u>	<u>\$ 8,178,577</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 5. Pledges Receivable, Restricted (Continued)

Pledges are recorded at the present value of estimated future cash flows. The present value of estimated future cash flows has been measured utilizing a rate commensurate with the risk involved ranging from 0.67% to 1.65% in 2015 and 2014.

Pledges receivable are primarily from foundations, churches and individuals located throughout Massachusetts.

Note 6. Property, Buildings and Equipment

Property, buildings and equipment consist of the following at December 31:

	2015	2014
Land	\$ 13,300	\$ 113,300
Buildings and building improvements	7,460,218	6,177,152
Equipment	177,101	177,101
Furniture and fixtures	58,048	58,048
Motor vehicles	83,547	79,603
	<u>7,792,214</u>	<u>6,605,204</u>
Less accumulated depreciation	(2,666,340)	(2,543,560)
Property, buildings and equipment, net	<u>\$ 5,125,874</u>	<u>\$ 4,061,644</u>

Depreciation expense for the years ended December 31, 2015 and 2014 was \$209,517 and \$229,691, respectively.

Note 7. Due to and from Affiliated Entities

Certain officers and employees of the Diocese assist in the management and administration of the funds of Trustees of Donations and other related entities. In addition, the Diocese pays certain administrative and other expenses on behalf of several affiliated entities, for which it is to be reimbursed in full. The amounts due from the affiliated entities totaled \$319,052 and \$287,781 at December 31, 2015 and 2014, respectively. In addition, the Diocese pays the Cathedral for building space and for certain administrative services.

Note 8. Funds Held for Other Beneficiaries and Affiliated Entities

Funds held for other beneficiaries and affiliated entities consist of the following at December 31:

	2015	2014
Funds held for other beneficiaries	\$ 1,183,345	\$ 1,381,557
Society for the Relief of Aged or Disabled Clergy	2,578,477	2,936,075
Society for the Relief of Widows, Widowers and Orphans of Clergy	993,776	1,089,646
	<u>\$ 4,755,598</u>	<u>\$ 5,407,278</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 8. Funds Held for Other Beneficiaries and Affiliated Entities (Continued)

Changes in funds for other beneficiaries and affiliated entities consist of the following for the years ended December 31:

	2015	2014
Balance, beginning of year	\$ 5,407,278	\$ 5,356,086
Contributions and spending policy draws	(310,104)	(78,846)
Funds expended	(426,790)	(211,878)
Investment earnings	85,214	341,916
Balance, end of year	<u>\$ 4,755,598</u>	<u>\$ 5,407,278</u>

Note 9. Property Held in Trust for Others

The Diocese has a "remainder interest" in all of the assets including cash, investments and real estate of each of the 163 Episcopal parishes and missions within its borders, such that should an Episcopal congregation cease to function, its assets revert to the control of the Diocese. These properties are not occupied or maintained by the Diocese, nor do the programs of the Diocese derive any direct benefit from its "remainder interest". They are, therefore, not reflected in the Diocese's financial statements, unless the Episcopal congregation ceases to function and title has been given to the Diocese.

Note 10. Investment in Property and Buildings and Lease Agreement with Affiliate

In 1989, a major renovation of the Sears and Clark Building and The Cathedral Church of St. Paul (the "Cathedral") was completed. This renovation was made pursuant to an agreement between the Cathedral and the Diocese for the renovation of these buildings for joint occupancy by the Cathedral and the Diocese under a lease from the Cathedral to the Diocese. In 2006, a new lease was signed for the facilities used by the Diocese, which requires the Diocese to make rental payments of \$1 per year plus a prorated share of the operating and maintenance expenses.

The Diocese recorded its cost of this renovation as a part of building improvements in its financial statements. The agreement between the Diocese and the Cathedral provides that should the Sears and Clark Building be sold, the Diocese and the Cathedral would share in the proceeds of the sale in the proportion that each entity's direct contribution bears to the total amount contributed by the two entities. The Diocese's direct contribution to the improvements totaled \$4,085,482 at both December 31, 2015 and 2014 (including the appraised value of the Sears and Clark Building prior to renovation) which is approximately 48% of the total amount contributed of \$8,514,496. Subsequent capital improvements to the buildings by either party will adjust their contribution basis.

During 2015 and 2014, the Diocese made \$441,600 in payments in lieu of rent to the Cathedral under a verbal agreement between the two parties. In addition, during 2015 and 2014, the Cathedral made \$103,200 in payments to the Diocese to cover its share of administrative costs. During 2015 and 2014, the Cathedral contributed \$30,000 to the Diocese in support of its mission.

Note 11. Gain from Sale of Property from Closed Parishes

During 2015 and in prior years, various churches were closed. In accordance with Canon Law, any property of the closed churches has reverted to the control of the Diocese once title to the property is passed to the Diocese and it is recorded at its estimated fair value. During 2015 and 2014, the real estate of one and two properties that had been previously closed were sold by the Diocese, which recognized a gain of approximately \$136,000 and a loss of approximately \$110,000, respectively.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 12. Net Assets

Temporarily restricted net assets consist of the following at December 31:

	2015	2014
Accumulated appreciation on permanently restricted net assets	\$ 9,783,963	\$ 10,448,114
Endowment funds restricted by donors for various programs	1,565,309	1,634,451
Bishop's directed trust funds restricted for various programs	68,353	102,766
Funds for support of programs	130,995	688,034
Together Now Campaign	6,838,091	7,103,505
	<u>\$ 18,386,711</u>	<u>\$ 19,976,870</u>

Temporarily restricted net assets were released from restrictions as follows:

	2015	2014
Capital campaign	\$ 1,360,611	\$ 821,744
Strategic ministries	1,727,076	972,177
Bishop's directed funds	217,687	177,463
Development grants	169,520	241,835
Diocesan staffing	79,747	209,822
Facilities	-	13,833
Clergy programs	16,624	34,719
Miscellaneous	-	4,956
Scholarships	59,206	56,072
Sabbaticals	8,202	7,768
	<u>\$ 3,638,673</u>	<u>\$ 2,540,389</u>

Permanently restricted net assets consist of the following at December 31:

	2015	2014
Funds to be held in perpetuity - endowment funds	\$ 6,928,849	\$ 7,115,729
Stokes revolving loan fund	4,281,296	4,232,686
Split interest agreements	32,096,054	33,708,627
	<u>\$ 43,306,199</u>	<u>\$ 45,057,042</u>

The Diocesan Council has designated certain unrestricted net assets as a Diocesan Council designated endowment fund. The board designated endowment is invested in the DIT.

Endowment net assets: Endowment net asset composition by type of fund as of December 31, 2015 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Donor restricted endowment funds	\$ -	\$ 11,349,272	\$ 6,928,849	\$ 18,278,121
Diocesan Council designated endowment funds	9,873,618	-	-	9,873,618
Total endowment net assets	<u>\$ 9,873,618</u>	<u>\$ 11,349,272</u>	<u>\$ 6,928,849</u>	<u>\$ 28,151,739</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 12. Net Assets (Continued)

Changes in endowment net assets for the year ended December 31, 2015 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Endowment net assets at beginning of year	\$ 9,465,962	\$ 12,082,565	\$ 7,115,729	\$ 28,664,256
Contributions	2,120,340	-	-	2,120,340
Dividend and interest income	189,695	320,503	-	510,198
Realized and unrealized losses, net of investment fees	(234,614)	(439,133)	(186,880)	(860,627)
Appropriation of endowment net assets for expenditure	(259,376)	(614,663)	-	(874,039)
Additional board approved withdrawals	(1,408,389)	-	-	(1,408,389)
Endowment net assets at end of year	\$ 9,873,618	\$ 11,349,272	\$ 6,928,849	\$ 28,151,739

Endowment net asset composition by type of fund as of December 31, 2014 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Donor restricted endowment funds	\$ -	\$ 12,082,565	\$ 7,115,729	\$ 19,198,294
Diocesan Council designated endowment funds	9,465,962	-	-	9,465,962
Total endowment net assets	\$ 9,465,962	\$ 12,082,565	\$ 7,115,729	\$ 28,664,256

Changes in endowment net assets for the year ended December 31, 2014 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Endowment net assets at beginning of year	\$ 9,230,909	\$ 11,673,027	\$ 6,960,849	\$ 27,864,785
Dividend and interest income	160,248	304,235	-	464,483
Realized and unrealized gains, net of investment fees	388,041	692,864	154,880	1,235,785
Appropriation of endowment net assets for expenditure	(313,236)	(587,561)	-	(900,797)
Endowment net assets at end of year	\$ 9,465,962	\$ 12,082,565	\$ 7,115,729	\$ 28,664,256

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 12. Net Assets (Continued)

Unrestricted net assets designated by diocesan council: Unrestricted net assets designated by Diocesan Council for specified purposes consist of the following, as of December 31:

	2015	2014
Future plans for ministry in Brockton	\$ 199,564	\$ 214,119
Chelsea project	81,108	118,448
Whitman All Saints project	-	10,000
	<u>\$ 280,672</u>	<u>\$ 342,567</u>

During 2011, the Diocesan Council authorized the creation of two funds designated for specified purposes from the net proceeds that were realized from past church closings. Under the authorization, 50% of the net proceeds were used to establish an endowment fund for congregational vitality at DIT and the other 50% of the net proceeds will be designated for future use in accordance with recommendations from the Diocesan Council. In early 2013, the Diocesan Council approved the appropriation of \$1.2 million to go towards a renovation project at St. Luke's/San Lucas in Chelsea for its feeding and clothing program. The fund designated by the Diocesan Council for the renovation project were invested with the DIT and expended during 2014. At December 31, 2015 and 2014, the endowment fund for congregational vitality was fully funded and is invested in the DIT.

During 2015 and 2014, \$155,001 and \$1,175,102, respectively was authorized and expended from the non-endowment unrestricted funds available for recommendations from the Diocesan Council.

Note 13. Interests in Split-interest Agreements

Interests in charitable remainder trusts: The Diocese has been named as a beneficiary of an irrevocable charitable remainder trust and pooled income fund. The fair value of these assets are calculated using present value techniques and are \$546,085 and \$573,540 at December 31, 2015 and 2014, respectively. These values have been reflected as assets in the accompanying statements of financial position as Interests in Charitable Remainder Trusts and Pooled Income Fund. These trusts have underlying assets with aggregate market values of \$560,071 and \$596,816 at December 31, 2015 and 2014, respectively. These assets will be donated to the Diocese upon the death of the income beneficiary in accordance with each individual trust agreement.

The net change in the interests in charitable remainder trusts is reflected in the accompanying statements of activities under the caption "changes in value of beneficial interests in trusts" and totaled \$27,455 in gains and \$943 in losses for 2015 and 2014, respectively.

Beneficial interest in perpetual trusts: The Diocese has a 100% beneficial interest in 54 perpetual trusts and 50% beneficial interest in 1 perpetual trust held by third parties at December 31, 2015 and 2014. The principal as well as annual gains or losses on the trust investments are restricted in perpetuity. The interest and dividend income generated by the trust investments is distributed each year to the Diocese. The net change in the interests in perpetual trusts is reflected in the accompanying statements of activities under the caption "changes in value of beneficial interests in trusts" and totaled \$1,585,118 in losses and \$902,748 in gains for 2015 and 2014, respectively. Distributions received by the Diocese from the trusts were \$1,159,964 and \$872,825 during the years ended December 31, 2015 and 2014, respectively.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 14. Litigation

In accordance with generally accepted accounting principles, certain claims, suits and complaints arising in the ordinary course of business have been filed or are pending against the Diocese. In the opinion of management, all such matters are adequately covered by insurance, or if not so covered, are without merit or are of such kind, or involve such amounts, as would not have a significant effect on the financial position or activities of the Diocese if disposed of unfavorably. Management's estimate of liabilities from these claims may change in the near term depending upon the ultimate outcome of these proceedings.

Note 15. Functional Classification of Expenses

Expenses by functional classification for the years ended December 31 are as follows:

	2015	2014
Program	\$ 9,126,558	\$ 10,277,699
Management and general	2,249,313	1,734,788
Fundraising	201,649	302,948
	<u>11,577,520</u>	<u>12,315,435</u>
Capital campaign	101,166	203,855
	<u>\$ 11,678,686</u>	<u>\$ 12,519,290</u>

Note 16. Pension Plan

Lay employees of the Diocese are provided pension benefits under a defined contribution plan. The Diocese contributes 10% of employee salaries to the plan. The amounts charged to expense for lay pensions in 2015 and 2014 were \$158,585 and \$112,913, respectively.

Note 17. Commitments

The Diocese contributes to a non-contributory defined benefit plan, the Clergy Plan, administered by the Church Pension Fund (the "Fund"). The Fund was established by the General Convention of the Episcopal Church; the Fund and its affiliates are official agencies of the Episcopal Church for these purposes and operate under the Canons of the Episcopal Church. The Fund was established to administer the clergy pension system of the Episcopal Church, including pensions, insurance, annuities, health and other programs. The plan is a single employer plan, where the Protestant Episcopal Church is the employer.

The Clergy Plan is a defined benefit plan providing retirement, death and disability benefits to eligible clergy of the Episcopal Church. The Diocese contributes to the plan at an assessed rate of 18% of total clergy compensation for clergy employed by the Diocese. Contributions to this plan totaled \$280,188 and \$210,204 for the years ended December 31, 2015 and 2014, respectively.

Note 18. Subsequent Events

The Diocese has evaluated subsequent events through November 28, 2016, the date the financial statements were available to be issued.

On January 4, 2016, the Diocese sold one property of a church that had been previously closed. Gross sales proceeds received from this transaction amounted to \$1,800,000.

Mission Strategy for the Episcopal Diocese of Massachusetts

*Adopted by the 231st Annual Diocesan Convention
November 5, 2016*

Our Vision

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

EMBRACING BRAVE CHANGE

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

Let all that you do be done in love.

(I Corinthians 16:13-14)

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

Reimagining Our Congregations

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

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

Building Our Relationships

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

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

Engaging Our World

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

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

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

An Invitation

This Mission Strategy is an invitation to all of our members and congregations to join in a conversation about our shared goals as Christians and Episcopalians in Eastern Massachusetts. Every community is different, and every congregation can adapt these strategies to match their particular gifts and needs. Every one of us has a part to take in living out our goals of transformation, relationship, justice, and reconciliation.

The nine goals of this Mission Strategy are intended both to reflect the ideas that the people of our diocese expressed in the listening process and to respond to the movement of the Holy Spirit. It also includes initial action steps, which represent starting places for our work together. The Mission Strategy Drafting Team recognizes that much work remains to create specific plans and clear measures of success. The team hopes that all members of our diocese—lay members, deacons, priests, and bishops—will continue to discern our shared mission through prayer, conversation, and experimentation in the days and years to come.

As specified in Canon 10, the Mission Strategy is designed to guide the use of our shared resources: the funds in our diocesan budget and the gifts and time of our diocesan staff. Changing an organization as large as our diocese will require wise and creative planning, as well as careful follow-through. To oversee this effort, the Bishops and Diocesan Council will name a seventeen-person Implementation Organizing Team in the fall of 2016.

The Implementation Organizing Team will create further opportunities for input and leadership as this process unfolds. The high level of engagement, honesty, and insight that has characterized the Mission Strategy listening and drafting processes gives us confidence that, with God's help, we can become a more transparent, connected, effective, and innovative community in Christ.

Goals and Initial Actions

As the Episcopal Diocese of Massachusetts, we will embrace brave change by **reimagining our congregations** to better respond to the movement of the Holy Spirit in our time and place; **building our relationships** to unite as one body in Christ; and **engaging our world** to reconcile ourselves and all people to one another, and all of Creation to God.

PREPARING THE WAY

1. Undertake an open and thorough review of our gifts, resources, and programs.

For which of you, intending to build a tower, does not first sit down and estimate the cost, to see whether he has enough to complete it? (Luke 14:28)

In order to be good stewards of the resources God has given us, we must begin by taking stock of our spiritual gifts, our partnerships, our programs and strategic ministries, and our budget, including the structure for parish assessments. Our commitment to this Mission Strategy will require changes in funding and in the responsibilities of diocesan staff that we will carry out both with compassion and appreciation for what has been done in the past and with a clear vision of the future we seek. We will also review the ways our governing bodies invite participation in leadership, make decisions, and communicate their work, so that all our members have opportunities to engage in decisions about the future of our diocese. Each team, committee, or governing body will work to ensure that its purpose and ways of working align with the goals of our diocese.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Establishing a clear structure and transparent process for regularly evaluating all programs and ministries that receive diocesan funding based on their contribution to the spiritual, relational, and practical goals of our diocesan Mission Strategy.
- b) Assessing the ways our current use of resources and governance structures support or impede the goals of our Mission Strategy, and making appropriate changes.

REIMAGINING OUR CONGREGATIONS

2. Share the Word of God and our own faith stories with greater confidence.

No one after lighting a lamp puts it under the bushel basket, but on the lampstand, and it gives light to all in the house. In the same way, let your light shine before others, so that they may see your good works and give glory to your Father in heaven. (Matthew 5:15-16)

Jesus calls us to proclaim the coming reign of God's love. We come together in Christian communities to experience that love more fully, healing our souls and transforming our lives. When we take the risk to tell our own faith stories and listen well to others, we renew our commitment to Christ, we invite people into a deeper relationship with God, and our congregations thrive. We are keenly aware that children, youth, and young adults have their own faith stories to share, and we strive to include their voices in this important work.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Inviting all members of our diocese to deepen our relationships with Jesus and strengthen our formation as disciples so that we can live our faith in the world.
- b) Supporting all members of our diocese in cultivating the skills of evangelism, so that we can all learn to share more readily how God is working in our lives.
- c) Reimagining our ministry with children, youth, and families, so that our young members receive the foundation they need to claim their faith into adulthood in an increasingly secular culture.

3. Address the fact of numerical decline boldly and creatively.

For surely I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope. (Jeremiah 29:11)

We envision our diocese engaged in honest conversation about the challenges we face. The health of any one congregation matters to all of us as members together of one body in Christ. Each congregation gathers people with unique spiritual gifts and a distinctive call to live out their baptismal ministry in the church, in their homes and workplaces, and in service to their wider community. Many of our congregations struggle to hold on to the joy of that calling when faced with the challenges of sustaining participation, maintaining aging buildings, funding clergy and staff salaries, and supporting programs. We hope to see our congregations, whether they feel healthy or challenged, working openly to discern their roles as Christian communities in a changing world.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Creating a public, transparent, representative body of our diocese to support all congregations through visioning and discernment.
- b) Designating a funding stream to assist congregations to engage brave change through creative models of leadership development, discipleship, and Christian community.
- c) Expanding opportunities for lay and clergy leaders to build connections with one another and to develop skills in spiritual formation, pastoral care, sound governance, financial stewardship, and building use, with attention to the needs of the nearly half of our congregations that employ part-time clergy.

BUILDING OUR RELATIONSHIPS

4. Initiate new relationships across our diocese.

Do not fear, for I have redeemed you; I have called you by name, you are mine. (Isaiah 43:1b)

God promises that each of us is known by name. The heart of church is the experience of knowing and being known, deepening our relationships with God and one another. As Christians we are called to share this gift, constantly expanding the circle of those we claim as our neighbors and our friends.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Developing opportunities for teams from congregations to visit other congregations, sharing worship and learning about one another.
- b) Creating time and space for building relationships at all diocesan-wide events.

5. Support stronger collaborations among congregations.

Two are better than one, because they have a good reward for their toil. For if they fall, one will lift up the other. (Ecclesiastes 4:9-10)

Our diocese is already enriched by a variety of collaborations: mission hubs; urban/suburban partnerships; gatherings of congregations with similar interests, such as leadership in small churches or engagement in global mission; and other shared ministries. We have seen the power and joy that come from working together, trusting not in our own self-reliance but in the God who calls us to be one body of Christ.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Initiating new partnerships and strengthening existing collaborations with other Episcopal congregations, ecumenical and interfaith partners, and community organizations.
- b) Connecting and equipping networks of lay people, clergy, and diocesan staff members who share a passion for particular forms of service and public advocacy (such as feeding the hungry, supporting veterans, caring for elders, ending sex trafficking, eradicating gun violence, or responding to addiction and substance abuse).

6. Incorporate regions outside of Boston more fully in the life of our diocese.

So then you are no longer strangers and aliens, but you are citizens with the saints and also members of the household of God, built upon the foundation of the apostles and prophets, with Christ Jesus himself as the cornerstone. (Ephesians 2:18-20)

In order to carry out our mission as a diocese, we must address any inequities of resources or access that can divide us. In particular, we hope to address the disconnection felt by many of our members who live outside Boston and its suburbs, so that we can work in grateful harmony as one diocese.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Creating opportunities for diocesan staff members to be present in congregations and ministries around our diocese and to gather with lay leaders and clergy in order to share and learn best practices, develop closer partnerships, and know all of our communities.
- b) Inviting members from all regions of our diocese to engage in leadership roles in all diocesan project teams and governing bodies.
- c) Ensuring that meetings and training opportunities are accessible to members from all regions of our diocese.

7. Fulfill the Gospel command to love one another, particularly across difference.

*Let all of us speak the truth to our neighbors, for we are members of one another.
(Ephesians 4:25)*

Christ calls us to heal a hurting world. We begin this work by reaching across the lines that divide us, welcoming the stranger and allowing ourselves to be welcomed by those we do not know. In these honest and loving encounters, we create greater justice and freedom for all. We are committed to responding as a diocese to the oppression that tears at the fabric of our nation and our world. We hope to honor the experiences of all those whose gifts have not been fully acknowledged and appreciated in the church and in the world, such as women; lesbian, bisexual, gay, and transgender people; people of color; and people with disabilities. We need a deeper and more inclusive conversation about racism and other forms of oppression, and we need to move beyond conversation to visible action to help create the beloved community of Christ.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Working to respond to Jesus' call to fully include all persons in the life of the church.
- b) Entering into a large-scale, authentic, and committed conversation about racism and other forms of oppression with the support of effective facilitators and training programs, in order to move us further into the essential work of racial justice and reconciliation.
- c) Investing in ministries with communities of color and immigrant communities, drawing upon their unique strengths and supporting their health.

ENGAGING OUR WORLD

8. Deepen our relationships with our neighbors in order to work side-by-side for a more just and peaceful world.

You shall love the Lord your God with all your heart, and with all your soul, and with all your mind. This is the greatest and first commandment. And a second is like it: You shall love your neighbor as yourself. (Matthew 22:37-39)

With a basis in mutual trust, our ministries can transform everyone who takes part in them. We recognize that all people come to God with brokenness and need, and all people are called to use their God-given talents to serve the world. Our mission efforts must always begin with strong relationships that break down divisions. Following the example of our deacons, we will work to bring the world to the church and the church to the world.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Working together to help all of our congregations to engage more deeply with their neighbors and local communities.
- b) Further strengthening our relationships with neighbors around the world through partnerships in global mission.

9. Strengthen our relationship with our Earth and our commitment to caring for Creation.

Ask the animals, and they will teach you; the birds of the air, and they will tell you; ask the plants of the earth, and they will teach you; and the fish of the sea will declare to you. ...In God's hand is the life of every living thing and the breath of every human being. (Job 12:7-8,10)

God created all things and called humanity to live in harmony with them. We are called to join God in repairing a broken covenant with our Earth, creating a more sustainable life for ourselves, for our future generations, and for all life.

We, the people of the Episcopal Diocese of Massachusetts, commit to:

- a) Continuing to foster a meaningful long-term conversation about caring for Creation in order to inspire all our members and congregations to be more faithful stewards of our physical world, reduce carbon emissions, respond to the effects of climate change, and advocate for sound climate policy.
- b) Designating a funding stream to support congregations that initiate or continue significant efforts in their local contexts to restore Creation and respond to the moral crisis of climate change.

A Prayer for Our Diocese and the Mission Strategy Process

Lord Jesus Christ, we come before you as a people of God,
seeking to join your transforming work in the world.
Open our eyes to see the movement of your Spirit.
Open our minds to imagine new possibilities.
Open our ears to hear the voices of all your children.
Open our mouths to speak with honesty and love.
Open our hands to share all that we have.
Open our hearts to receive all that we need.
Thank you, Lord, for calling us
as your disciples and friends.
Give us courage to follow where you lead. Amen.

REPORTS TO BE RECEIVED BY TITLE:

**DIOCESAN COUNCIL REPORT
STANDING COMMITTEE REPORT
COMMISSION ON MINISTRY REPORT**

**THE 231ST ANNUAL CONVENTION OF THE DIOCESE OF
MASSACHUSETTS
HOLIDAY INN, MANSFIELD, MASSACHUSETTS**



DIOCESAN COUNCIL REPORT TO CONVENTION SEPTEMBER 2015 - JUNE 2016

The Diocesan Council met nine times during the 2015-2016 program year. On a regular basis Council received reports from the bishops and updates from committees and task forces. All meetings were held at the Cathedral Church of St. Paul in Boston, unless otherwise noted. The following summarizes particular issues Council considered or discussed at each meeting.

September 19, 2015, at St. Andrew's Church, Framingham

- Heard a report from the Budget Committee chair, the Rev. Stephen Voysey, on the proposed 2016 diocesan budget, and voted to accept the recommendation of the Assessment Coordinating Committee to lower the 2016 assessments for 15 parishes by a total of \$66,808; to confirm the multiyear downward adjustments for two parishes totaling \$16,323; and to accept the increase of \$1,301 in the assessment for one mission.
- Voted to approve the following as sources of funding for the Grace Chapel, Brockton supplemental budget of \$111,771: first, the remaining proceeds from the sale of St. Paul's Church, Brockton and, second, the proceeds from the sale of the Brockton condominium.
- Heard a presentation on the proposed Boston-Cambridge Mission Hub and voted that it be sited as such.
- Heard a proposal from the Rev. Sam Rodman and the director of development, Lynd Matt, on future mission hub fundraising opportunities.
- Was introduced to Jin Min Lee, newly hired director of mission hubs.
- Heard a presentation from the Rev. Rebecca Black and the Rev. Julie Carson on the work of the Metrowest Mission Hub to date.
- Voted to relieve Christ Church of South Hamilton and Wenham of its obligation to pay past due assessments totaling \$147,904 (\$51,213 left unpaid on the payment plan covering the 2004-2008 period; \$64,691 unpaid on the 2009 assessment of \$110,166; and \$32,000 unpaid on the 2010 assessment of \$80,000).
- Voted to endorse the diocesan treasurer's proposal to allocate stock market exposure through DIT funds equally between the existing DIT Stock Fund and the proposed DIT fund to be managed by Aperio, and to reaffirm the role of the Financial Advisory Committee as Council's designated representative in communication with the Trustees of Donations with respect to managing diocesan agency endowments.
- Heard a presentation from the Mission Strategy Listening Process Design Team.
- Heard an Annual Fund update from the director of development, Lynd Matt.
- Voted to amend the following cost centers in the proposed 2016 diocesan budget:
 - Increase 2000 compensation costs by \$48,354
 - Decrease 4099 compensation costs by \$15,000
 - Decrease 4099 operational and support services by \$10,000
 - Decrease 5141 operational and support services by \$7,500
 - Decrease 5142 operational and support services by \$2,500
 - Decrease the reserve for uncollected assessments by \$13,354.
- Voted to endorse the proposed 2016 diocesan budget as presented and amended, and recommended favorable action by Diocesan Convention on the motions presented on page eight of the budget book.
- Heard that the Executive Committee voted the following at its meeting on Sept. 3: To authorize the Treasurer's Office to spend up to \$54,000 from the diocesan equipment reserve for a new server and computer system.
- Heard an update on Diocesan Convention elections and resolutions.

October 22, 2015

- Heard a report from the chair of the Audit Committee, John Woodward, and voted to accept the audit of the 2014 financial statements as prepared by McGladrey LLP.
- Heard from the Very Rev. Jep Streit about the renovations to the Cathedral Church of St. Paul and resulting changes that will make the building more welcoming to all.
- Heard from Bishop Gayle E. Harris about the recent bishops suffragan retreat she attended in Rome and Paris.
- Heard a report from the treasurer, Jim Gammill, on a fossil fuel free investment fund identified by the Trustees of Donations in response to the 2013 Diocesan Convention resolution requesting such, and then voted to express its thanks and to approve a payment of \$35,000 to the Trustees of Donations as reimbursement for the consultant search costs incurred in the design of this alternative investment vehicle.
- Voted to approve several clergy housing allowances for 2015.
- Heard a report on third quarter financials and voted their acceptance.
- Voted to honor and thank Jim Gammill for his service as diocesan treasurer.
- Heard a report from the director of development, Lynd Matt, on future mission hub fundraising opportunities, and voted to endorse the diocesan Office of Development's presentation to Diocesan Convention on a collaborative campaign model for future mission hub fundraising, with the expectation that budget details be presented to Diocesan Council in December.
- Voted to accept the recommendation for this year's Mission Tithe Council Grant award, to be announced at Diocesan Convention.
- Heard a mission strategy listening process update from the canon for congregations, the Rev. Canon Libby Berman.
- Heard an update about Diocesan Convention and a reminder about the upcoming pre-convention forums.

December 3, 2015

- Heard a report from Bishop Alan M. Gates on the recent pilgrimage he and Bishop Gayle E. Harris and a diocesan group made to the Holy Land.
- Heard a report from the diocesan treasurer, Lisa Garcia, on goals for the upcoming year, and voted to approve clergy housing allowances for 2015 and 2016.
- Voted to approve a first-year budget for the Boston-Cambridge Mission Hub of up to \$85,000.
- Heard a report from the Rev. Sam Rodman about the collaborative campaign component of the mission hub fundraising plan.
- Gave feedback about the November Diocesan Convention and suggestions for future conventions.
- Heard an update about the mission strategy listening sessions.
- Heard a report about building repairs that are needed to the St. Luke's and St. Margaret's property in Allston.
- At its Nov. 19, 2015, meeting the Executive Committee of Diocesan Council: Voted to approve a withdrawal of up to \$300,000 from the Maintenance Reserve Fund to mitigate serious structural issues with the parish hall and church building of the St. Luke's and St. Margaret's property in Allston.
- Voted to reappoint the Rev. Jane Bearden, Virginia Rogers and Ted Ts'o to the Budget Committee for terms ending in 2018.

January 22-23, 2016 Retreat at the Barbara C. Harris Camp and Conference Center, Greenfield, NH

- Heard an update from the Diocesan Mission Strategy Listening Process Design Team.
- Heard a report from the diocesan treasurer, Lisa Garcia.
- Voted to reappoint all current Executive Committee members with the exception of Matt Harper-Nixon, who concluded his term in December. The council thanked him for his service over the past year.
- Voted to thank Jim Gammill, past treasurer, for his service on the Executive Committee.
- Heard a report from the mission hub director, Jin Min Lee, on second-round budget approvals for the mission hubs.

- Heard an update from the director of development, Lynd Matt, on the collaborative campaign aspect of the mission hub fundraising initiative.
- Brainstormed future Diocesan Council agenda items and priorities.
- Voted to elect the Rev. Meghan Sweeney as chair of the Mission Strategy Design Team for phase two of the process.
- Heard an update on the Annual Fund from the director of development, Lynd Matt.
- Heard an update from the chief business officer, Gerry Sullivan, on the former St. Luke's and St. Margaret's property in Allston.

February 25, 2016

- Heard a report from the diocesan Treasurer's Office.
- Heard a mission strategy process update from the listening team chairperson, the Rev. Meghan Sweeney.
- During an executive session, decided on a process for nominating members to the mission strategy drafting team and voted to elect members to that team.
- Voted to approve the fourth-year budget for the South Coast Mission Hub.
- Voted to approve the second-year budget for the North Shore Mission Hub.

March 17, 2016

- Heard a report from the Barbara C. Harris Camp and Conference Center director, John Koch.
- Voted to approve the following mission hub budgets, pending the Budget Committee's approval in April: Merrimack Valley; Metrowest; and Plymouth, Cape and Islands.
- Heard a report from the diocesan treasurer, Lisa Garcia, on the 2017 assessment formula, 2015 budget actuals, the 2017 budget process and other financial matters.
- Heard a report from the Closing and Merging Parishes Task Force.
- Heard a mission strategy process update.
- Voted to confirm the appointments of the following people to the Jubilee Global Mission Committee of Diocesan Council: the Rev. Kate Cress, Natalie Finstad, the Rev. Maggie Geller, Douglas Huber, Mary Beth Mills-Curran and the Rev. Noble Scheepers.
- Heard a mid-year report from El Hogar, a recipient of a Mission Tithe Council Grant.
- Discussed the best way to review information received from the mission hubs and voted to create an ad hoc committee made up of members of Diocesan Council who will work with the Mission Hub Implementation Committee to efficiently evaluate hub ministries and create a process for reviewing and presenting information.

April 28, 2016

- Heard a mission strategy update and voted to accept the nomination of Win Treese as co-chair of the Mission Strategy Drafting Team.
- Voted that the assessment formula for 2017 is:

$$\text{assessment due} = 15.5\% * \text{BASE} - \$6,000 \text{ (subject to a floor of 0)}$$
 where the BASE for 2017 is equal to line 14 ("all other operating expenses") from the 2014 parochial report, less line 7 ("assistance from diocese").
 For a mission, the 2017 assessment is two-thirds the amount that would be assessed if the congregation were a parish.
- Voted to authorize the Assessment Coordinating Committee to consider and receive requests from congregations for adjustments to the 2017 scheduled assessments, with total adjustments not to exceed \$75,000.
- Heard a report from the diocesan treasurer, Lisa Garcia, on reviewing the assessment formula for 2018 and beyond.
- Heard a report from the chief business officer, Gerry Sullivan, on the year-to-date financials.
- Heard an update about Grace Chapel in Brockton.

May 19, 2016

- Welcomed a new member, the Rev. Phil LaBelle, who is filling the term of the Rev. Julie Carson.
- Heard an update from the Mission Strategy Drafting Team.
- Heard a recommendation from the Mission Hub Ad Hoc Committee on how to review mission hub program and budgets going forward.
- Heard a report from the Treasurer's Office on the 2017 budget draft.
- Heard that the Executive Committee approved proposed adjustments to Bishop Gayle E. Harris's mortgage, based on current market values.
- Voted to appoint Rob Kelleher to the Assessment Coordinating Committee, joining Connie Melahoures, the Rev. Tom Mousin and Chris Trahan who were appointed by the Executive Committee.

June 16, 2016

- Welcomed the new canon to the ordinary, the Rev. Canon Bill Parnell, and welcomed Betsy Ridge Madsen, new member from the Boston Harbor Deanery.
- Voted on the membership structure of the Mission Hub Implementation Committee.
- Heard a report from the treasurer, Lisa Garcia, on the 2017 budget draft, parishes that have not submitted audits for the current audit year and parishes that are in arrears on their assessments.
- Voted to restore the votes of the lay delegates for Grace Church in Salem and St. Elizabeth's Church in Wilmington for the 2016 Diocesan Convention, in recognition of their goodwill efforts to resolve assessment arrearages.
- Heard an update from the Mission Strategy Drafting Team and voted to adopt a process for naming a Mission Strategy Implementation Team.
- Heard an update from the Parish Mergers, Closings and Related Disposition of Diocesan Parish Properties Task Force.
- Heard an update about relocation of cremated remains interred on the property of the former Church of the Holy Spirit in Wayland.
- Heard that the Executive Committee voted to postpone the approval of the Roxbury-Dorchester Mission Hub's second-year budget until the fall.

Respectfully Submitted,

Laura Simons
Assistant Secretary

STANDING COMMITTEE REPORT TO CONVENTION SEPTEMBER 2015 – JULY 2016

The Standing Committee's work includes matters pertaining to real estate, Stokes Loans, parish by-laws and/or constitution revisions, and the ordination process. The following is a summary of the votes taken by the Standing Committee over the past year. All meetings took place at the diocesan offices unless otherwise noted.

On September 10, 2015:

- VOTED that pursuant to Canon IV.16(B).3, the Standing Committee ascertains that the Rev. Richard Bradford has abandoned The Episcopal Church by an open renunciation or by formal admission into a religious body not in communion with The Episcopal Church.
- VOTED to provide its advice and consent under the provisions of Canon 18 for the sale of the Church of the Holy Spirit at 109 Rice Road, Wayland at a price not below \$1,650,000 with the condition that all efforts be made to preserve the memorial garden on the property.
- VOTED to provide its advice and consent of the granting of a Stokes Fund Loan for Trinity Church, Bridgewater, in the amount of \$100,000 at 3.75% for a 15 year term to fund capital projects and consolidate debt and to take an encumbrance under the provisions of Canon 18 on the property at 91 Main Street to secure such Stokes Loan.
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of St. John's Episcopal Church, Arlington, Massachusetts, to sell the property located at 31 Hopkins Road, Arlington, Massachusetts, at a price not below \$700,000, with the following conditions: (1) that the net proceeds for the sale would be used to meet the immediate and intermediate St. John's church building repair costs of up to \$634,500, as outlined in the proposal to REAC dated August 21, 2015, and (2) that any remaining funds would be allocated to a restricted endowment fund under the Trustees of Donations to the Protestant Episcopal Church; further that any written policy of St. John's to draw on the principal of this endowment fund to be subject to the review and approval of the Standing Committee and the Bishop Diocesan, in consultation with the Congregational Development Team.
- VOTED to provide its approval of the merger of Trinity Parish of Newton Centre ("Trinity") and Parish of the Messiah, West Newton and Auburndale, Massachusetts ("Messiah"), using the Trinity corporation entity for the combined parishes, when the application for merger is filed with the Commonwealth of Massachusetts. And further, that for now, these combined parishes will take the name of Trinity until such time as they may submit a request to the Standing Committee to re-name the combined parishes and file such request of the Commonwealth. And further, that the Standing Committee recommends to the Diocesan Bishop that he approve this merger. And further, that the Standing Committee approves the adoption of the by-laws for the new entity, such by-laws being prescribed by the Diocese (and included as a separate attachment).
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of the Parish of the Messiah, West Newton and Auburndale, Massachusetts, to sell the property located at 1900 Commonwealth Avenue, Auburndale, Massachusetts under the following circumstances only:
 - negotiating a sale to Brookline Infant Toddler and Childcare, Inc. (BITC) which allows for the sale of the property at 1900 Commonwealth Avenue at a price not less than 94% of the appraised value of \$3,485,000 (94% X \$3,485,000 = \$3,275,900); OR
 - negotiating a sale to a developer interested in continuing the BITC lease at a sales price not less than 94% of the appraised value of \$3,485,000 if no brokerage fee (94% X \$3,485,000 = \$3,275,900).Additional conditions on the proceeds from any sale are to be: (1) that the net proceeds for the sale shall be deposited in an investment account for safe-keeping under the Trustees of Donations to the Protestant Episcopal Church in a named fund under the name of the merger church; and (2) that any withdrawal of principal or use of income through a spending policy draw would be subject to the review and approval of the Standing Committee and the Bishop Diocesan, in consultation with the Congregational Development Team and the Real Estate Advisory Committee.
- VOTED to confirm the Disciplinary Board's election of the Rev. Christine Whittaker as its president.

- VOTED to consent to the election of the Rev. Canon George R. Sumner as Bishop Diocesan of the Diocese of Dallas.
- VOTED to consent to the election of the Rev. Moises Quezada-Mota as Bishop Coadjutor of the Diocese of the Dominican Republic.

On October 8, 2015:

- VOTED to approve the following candidates for ordination to the priesthood: Vincent Michael Bousquet, Edward Cardoza, Aileen DiBenedetto, Charlotte LaForest, Matthew Lindeman, Eric Litman, Stephen McCarthy, Yolanda Rolle, Noah van Niel and Andrea Wyatt.
- VOTED to provide its advice and consent under the provisions of Canon 18 for the discharge of that certain easement from the southwest corner of the property at 237 Pleasant Street, Franklin, Massachusetts, southwesterly over property of Franklin Lumber Company and others out to Dean Avenue, in exchange for \$50,000 (in a structure to be negotiated) provided that all proceeds from the transaction be used only for capital improvements to the church property or inclusion in a restricted endowment fund. The imposition of this condition subsequent shall not affect the effectiveness of this approval.
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of St. John's Episcopal Church, Arlington to restructure of existing loans such that they will be extended for seven additional years at 3.75%.
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of St. John's Episcopal Church, Holbrook for a \$90,000 Diocesan loan for 15 years for critical roof repairs and to refinance a bank loan that had funded major capital improvements.
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of Christ Church, Medway to restructure their existing loan such that it will be extended for an additional 13 years at 3.75%.

On November 5, 2015:

- VOTED to approve the by-laws as revised and submitted by St. Peter's Church, Cambridge.
- VOTED to approve the by-laws of Trinity Church, Bridgewater, subject to the suggested amendments.
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of St. John's Church, Sandwich, to sell land and building abutting church property located at 2 Jarves Street, Sandwich, for an amount not less than \$225,000, with the net proceeds to be used to make capital improvements to the remaining property of St. John's and if any remaining funds, to pay down other existing real estate debt on church property.

On December 10, 2015:

- VOTED to appoint the Hon. Judith Dilday (ret.) as President of the Standing Committee.
- VOTED to appoint the Rev. Amy McCreath as Vice President of the Standing Committee.
- VOTED to approve the following candidate for ordination to the priesthood: Zachary Brooks
- VOTED to approve the by-laws, as submitted, for St. Cyprian's Church, Roxbury.

On January 16, 2016 at Rolling Ridge Retreat Center, Andover, MA:

- VOTED to appoint The Rev. Pam Werntz as Secretary of the Standing Committee.
- VOTED by concurrent vote of both the lay and clerical members of the committee to appoint Mr. Wayne Kennard to fill the vacancy on the Standing Committee until the next session of the Annual Convention.
- VOTED to approve the by-laws of St. Paul's, Dedham as submitted.
- VOTED to begin a process to explore conducting a mutual ministry review with Bishop Gates.

On February 11, 2016:

- VOTED to approve the by-laws of All Saints', Belmont, as submitted, subject to vote at an annual meeting to insert "Associate Treasurer" in between "Treasurer" and "Clerk" in line two of section 16.
- VOTED to provide its advice and consent under the provisions of Canon 18 to a request from the Vestry of St. John's Church, Franklin to enter into a 40 year lease with Vertex Towers, LCC and its successors and assigns, of a portion of the property at 237 Pleasant Street, Franklin to be used for the erection and

operation of a wireless communications tower and ancillary improvements, provided that the parish obtain and record with the Notice of Lease an as built survey, including a legal description of the tower and improvements.

- VOTED to ratify the election of Frank LoPiccolo, Christine Clements, Judy Porteus, Wayne Webster, Anne Gwin, Jennifer Gruber and Richard Olsen to the Vestry of Christ Church in the City of Boston (Old North Church).

On March 10, 2016:

- VOTED to provide its advice and consent under the provisions of Canon 18 to the sale of the property known as Fisher House under the following conditions: that the property be listed for sale with a licensed real estate broker; that the sales price be no less than \$2.0 million; and that from sales proceeds and fund raising, the parish establish an endowment of at least \$1.8 million, draws from which are subject to a maximum of the total return policy established annually by the Diocesan Investment Trust. VOTED to approve the following applicants for ordination to the transitional diaconate: Vincent Michael Bousquet, Edward Cardoza, Aileen DiBenedetto, Charlotte LaForest, Matthew Lindeman, Eric Litman, Stephen McCarthy, Yolanda Rolle, Noah van Niel.
- VOTED to approve Emily Garcia as a candidate for the priesthood effective December 1, 2015, conditional upon successful completion of Clinical Pastoral Education. VOTED to receive the following applicant as a priest in the Episcopal Church: Brian Raiche.
- VOTED to consent to the election of the Rev. Dr. Douglas E. Sparks as bishop diocesan of the diocese of Northern Indiana.
- VOTED to consent to the election of the Rev. Patrick W. Bell as bishop diocesan of Eastern Oregon.

On April 14, 2016:

- VOTED to recommend the following people for ordination to the diaconate: Thomas A. Bartlett, Philip Flaherty, Robert Greiner, Kristine M. Holmes and Elizabeth Jordan.
- VOTED to recommend the following people for ordination to the transitional diaconate: Zachary Brooks, Marisa Egerstrom, Isaac Everett, Christopher Whiteman and Charles A. Wynder.
- VOTED to consent to the election of a Bishop Suffragan for the diocese of West Texas.
- VOTED to consent to the election of the Rev. Canon Daniel G. P. Gutierrez as Bishop Diocesan of the Diocese of Pennsylvania.

On May 12, 2016: no votes were taken.

On June 8, 2016:

- VOTED to recommend David Prentice for ordination to the priesthood.
- VOTED to provide its advice and consent of the granting of a Stokes Fund Loan for All Saints', Attleboro, in the amount of \$80,000 at 3.75% for a 15 year term to fund critical roof repair and additional work on the interior walls and to take an encumbrance under provisions of Canon 18 for the property at 121 North Main Street to secure such Stokes Fund Loan.
- VOTED to provide its advice and consent of the granting of a Stokes Fund Loan for Christ Church, Medway, in the amount of \$30,145 at 3.75% for a 15 year term to fund the replacement of the boiler and to take an encumbrance under provisions of Canon 18 for the property at 14 School Street to secure such Stokes Fund Loan.

July 19, 2016 (electronically):

- VOTED to provide its advice and consent for the appointment of the Rev. Karen Coleman to the Disciplinary Board, filling a term through Convention 2016.

Respectfully Submitted,

Laura Simons
Assistant Secretary

COMMISSION ON MINISTRY 2016 REPORT TO CONVENTION

The Commission on Ministry (COM) has the privilege of working with the Bishops as they select and guide the formation of postulants and candidates in preparation for ordination to both the diaconate and priesthood. Our work is supported by many others, including sponsoring parishes and clergy, parish discernment committees, internship and field education parishes, seminaries, spiritual directors, and the families and friends of postulants and candidates.

Members of the COM serve as liaisons to parish discernment committees, advisors to postulants and candidates and meet monthly with the Bishops and Canon for Ordained Vocations. They work in collaboration with the Standing Committee to make the ordination process accessible and to improve coordination and communication among all those who participate in the work of discernment in this diocese.

We gratefully acknowledge the assistance and guidance of many in this diocese and beyond who help to form the women and men who are called to ordained leadership in the church. We particularly value the contributions of clergy and laity in preparing postulants and candidates for diaconal ministry and for the support of divinity school faculty.

The 2015 Diocesan Convention accepted our amendment to the Diocesan Constitutions and Canons to expand the COM from twelve to fifteen members, both to share our regular work with inquirers, postulants and candidates but also to allow us to undertake special projects. Thanks to this expansion we welcomed five new members to the COM: Dr. Laura Crain, Rev. Eric Hillegas, Rev. Dan Horgan, Rev. Sarah Kelb and Rev. Dr. Jim Weiss. We are very grateful to Ms. Ella Auchincloss, co-chair, who completed her term of service on the Commission on Ministry in June of 2016 and to Ms. Kay Ridgard, who assumed the role of co-chair in her stead. We would also like to thank the Rev. Dr. Edith Dolnikowski for her unwavering support and guidance to both the members of the COM and the postulants and candidates in the ordination process.

COM Statistics for 2016

In 2015 the Commission received commitment forms from sixteen inquirers, of which eleven filed applications for postulancy after having worked with their parish discernment committees. Of those eleven, seven were invited to interview and all seven were accepted as postulants, three for the priesthood and four for the diaconate effective June 1, 2016.

The COM continues to award scholarship assistance to those preparing for Holy Orders. Funding for this assistance comes from a diocesan endowment created in 2001 to support theological education and from donations to the bishops' discretionary funds received during parish visitations. This year \$61,800 was awarded to postulants and candidates. Scholarships ranged from \$800 to \$14,000 per person. These scholarships help to address the significant amount of debt incurred by those in the ordination process, which has long-term effects on deployment decisions.

The commission reports the following data for the past year:

2016 marked the first year in several decades in which transitional deacons were ordained priests in the congregations to which they had been called to serve. Between December 2015 and January 2016 ten transitional deacons were ordained to the priesthood, six of them in congregations in the Diocese of Massachusetts. In June 2016, five candidates were ordained to the diaconate, and five candidates were ordained as transitional deacons.

As of July 1, 2016 there were thirty-six people in the ordination process as postulants, candidates and transitional deacons – twenty-six for the priesthood and ten for the diaconate. They come from twenty-eight sponsoring congregations throughout eleven deaneries in the diocese.

The average age of the seven new postulants this year:

Year	Priesthood	Diaconate	Combined
2016	31	54	44

The average age of new postulants over the preceding seven years:

Year	Combined
2015	38
2014	50
2013	43
2012	41
2011	36
2010	47
2009	45

Our current membership roster is as follows (as of September 2016): Dr. Laura Crain, The Rev. Miriam Gelfer, The Rev. Dr. Elizabeth Gibson, Ms. Karon Gibson-Mueller, The Rev. Edgar Gutierrez-Duarte, The Rev. Eric Hillegas, The Rev. Daniel Horgan, The Rev. Sara Irwin, The Rev. Edwin Johnson, The Rev. Sarah Kelb, Mr. Graeme Mills, Ms. Kay Ridgard, Ms. Branwen Smith-King, The Rev. Dr. James Weiss and The Rev. Patricia Zifcak. The Rev. Dr. David Killian serves as Chaplain to our postulants and candidates.

We want to thank the members of the COM for their deep commitment to this ministry. Our diocese is blessed to have these wonderful souls at work, discerning the future leadership of the church. It is our privilege and joy to work with them.

Faithfully Submitted by:
Karon Gibson-Mueller and Kay Ridgard
Co-chairs, Commission on Ministry

Report of the Diocesan Loan Committee 2016

Year 2016, the Diocesan Loan Committee approved the following loans:

Congregation:	Date of Loan	Rate/Amount/Term of Loan
All Saints Church, Attleboro	06/22/2016	3.50% \$ 80,000.00 – 15 years
Christ Church, Medway	08/01/2016	3.50% \$ 30,145.00 – 15 years
St. James, Groveland	12/12/2016	3.50% \$ 6,798.00 – 15 years
		TOTAL \$116,943.00

As of December 31, 2016, the outstanding loan portfolio was 2,098,405.61 representing 80 loans.



EPISCOPAL CITY MISSION
2016 Annual Report



FROM THE CHAIR

The last year has seen a number of changes for Episcopal City Mission. In March, we said goodbye to the Reverend Noah Evans as Chair of the Executive Committee. ECM flourished under his leadership, and he left big shoes to fill. I was honored to be given the opportunity step into the Chair role, and I am excited about ECM's future.

ECM undertook a comprehensive strategic planning process this year that included an intensive listening campaign, a planning and learning retreat, and focus groups. The Executive Committee has been working hard to distill the information gathered and discern a strategic plan that will propel us into a new era of prophetic leadership. We look forward to working with our constituents to bring this new strategic plan to life.

Finally, after acting as the fiscal agent and a funder for the Leadership Development Initiative for many years, ECM has decided to make LDI a part of ECM. This will allow us to more efficiently and effectively carry out our mission. Particularly, LDI's formation training program will become a critical aspect of ECM's strategic plan, assisting in the development prophetic leaders and the gathering of individuals and communities for collaborative and impactful economic and social justice work in Massachusetts.

ECM continues to lead the way in collaborative social change during this time of urgency, and we are making changes to expand the impact of that work. Thank you for being a part of it.

Erin Alarcon



*"See, I have set before you today life and prosperity, death and adversity. Choose life so that you and your descendants may live."
Deuteronomy 30:15, 19*

FROM THE EXECUTIVE DIRECTOR

There is much at stake in our lives and communities. The Christian tradition reminds us that we must choose life for generations of our children to thrive. This choice is not solely about our individual lives and families but grows out of right relationship with God and in kinship with our neighbors and all of creation.

Our future depends on us being in deeper relationship with our neighbors, and making choices that reflect our connection to one another. To that end, these questions guide us:

- How do we claim a moral vision rooted in our faith belief that all life is sacred and resist and name the evil - ways of being, practices, policies, and systems - that denies and separates anyone from life, dignity and justice?
- How do we fulfill our Christian commitment to a 'love that does justice' through partnering with efforts and movements for more whole and equitable communities?
- How can our faith-rooted justice deepen the connection between personal and social transformation by supporting communities grounded in practices of contemplation and action?

Making choices rooted in right relationship can be uncertain and threatening. We are conditioned to live focused on our individual lives and communities, prioritizing the worth of those similar to ourselves.

Our deepest resource for the transformation of our fear and conditioning is the love that Jesus is. This is the Love that he commands us to embody - a love of God, ourselves, and our neighbor. This Love transforms on the cellular level, and can overturn unjust systems on the macro level.

We humbly and boldly endeavor to place this Love at the center of Episcopal City Mission's next step into our ongoing awakening and transformation.

With Gratitude for your partnership,

The Reverend Arrington Chambliss

* The Reverend Dr. Martin Luther King developed the philosophy of the "love that does justice", signifying the deliberate cultivation of mutually-reinforcing cycles of personal and systemic change.

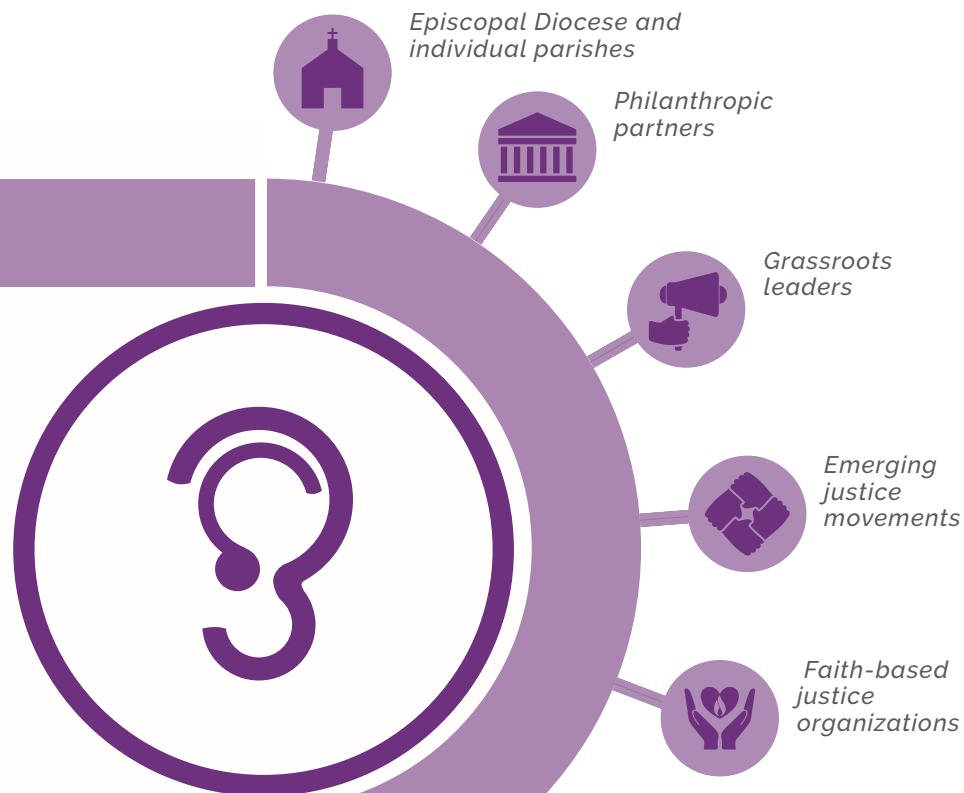


In June 2016, ECM began a strategic planning process by listening...

1

Listened carefully

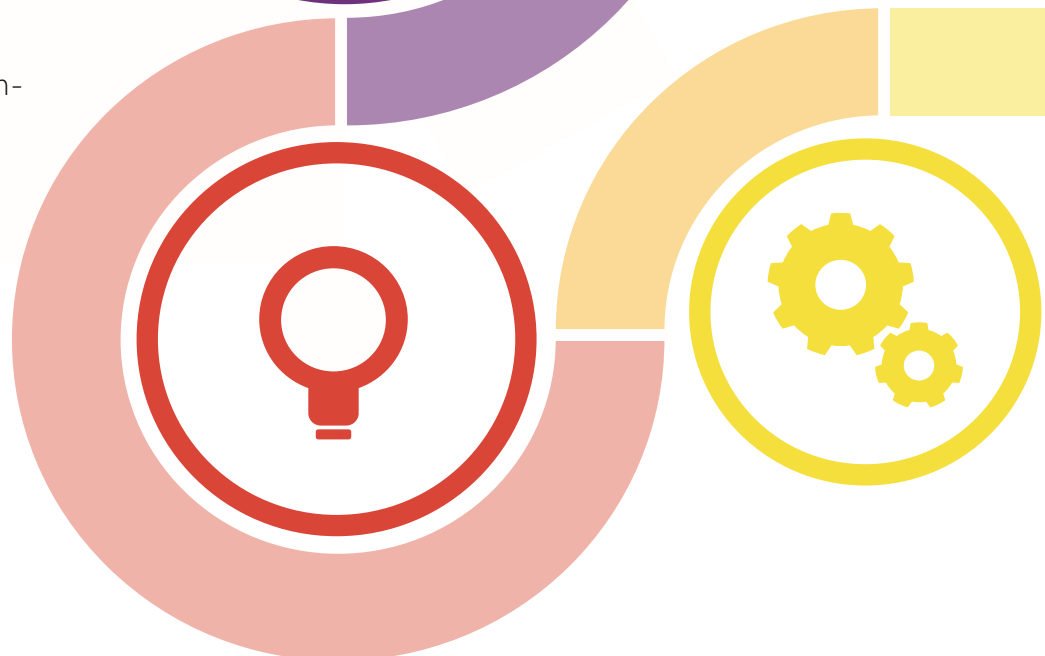
Over the course of a year, we listened carefully to over 250 people from five different ecosystems: the Episcopal Diocese and individual parishes, philanthropic partners, grassroots leaders, faith-based justice organizations, and emerging justice movements.



2

Gathered information

Through varied methodologies we gathered information: 100 one-to-one interviews, a visioning conversation at our 2016 Annual Meeting and began to develop a strategic framework to guide our planning.



Developed a framework

3

In March 2017, 18 leaders from across our constituencies reviewed, debated, and discussed this strategic framework at a one and a half day Planning and Learning retreat. We then shared this framework through two focus groups in Boston, MA and Haverhill, MA.

4

Absorbed ECM's history

We also absorbed ECM's rich 173-year history by meeting with elder leaders and reading written histories, including issues of the newsletter, *City Issues*.



5

Studied key questions

We studied the evolution of ECM's work by examining key turning points in the history that surfaced questions such as: How can the Episcopal church be relevant to urban communities? How can voices and the leadership of those most impacted by oppression guide our work? How will a theology of liberation shape our understanding of partnership? How can ECM use its power and resources to most effectively impact change? And how can ECM contribute to the restoration of relationships fractured by white supremacy, racism, class privilege and other forms of oppression to what God imagines for us?



6

Acted upon our values

We also joined strategic faith-based organizing partners from January - August 2017 to act in alignment with our values and in response to outright attacks on vulnerable communities.

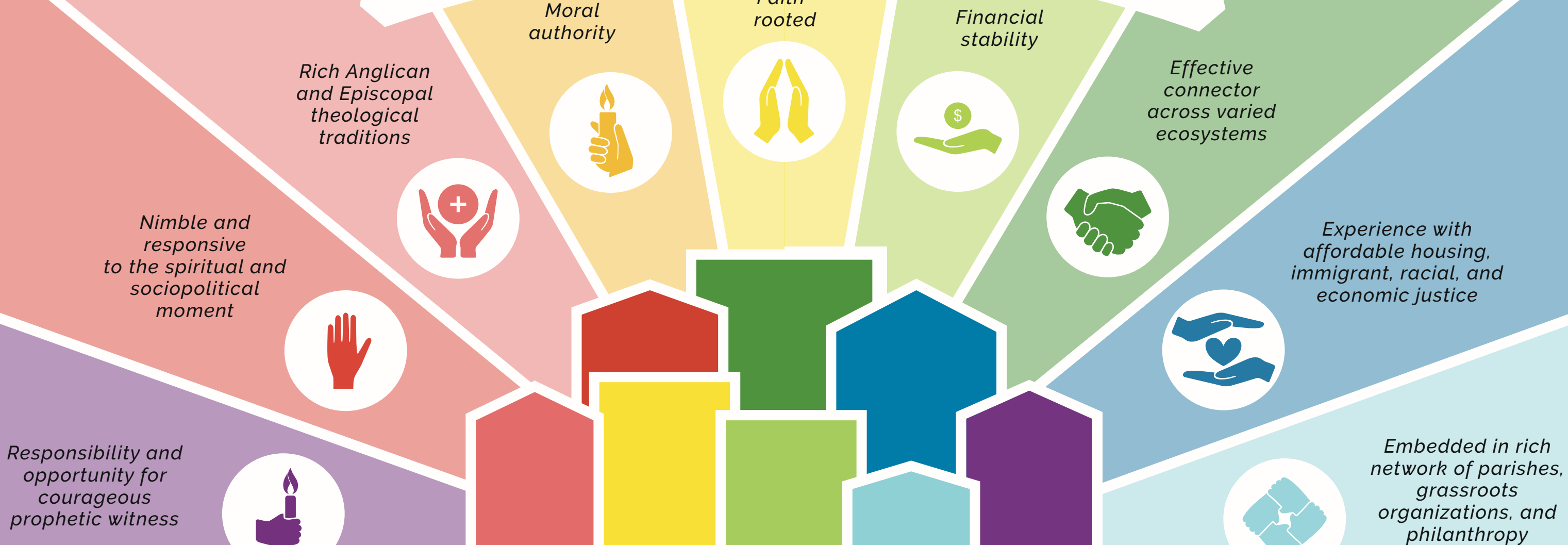


These actions helped us to explore our unique role in the weaving together of a faith-rooted solidarity network for immigrant justice. This action-based discernment added important new dimension to our listening campaign.

God is doing something new through our partnerships and aligned with 173 year's of mission.

The following strategy offers a frame and the ground for us to begin planting our commitments and practice. It will guide us as we develop culture, work plans, partnerships and measures for impact. With our partners: episcopal parishes and dioceses, faith-rooted organizers, grassroots and philanthropic organizations, we will continue to listen for ongoing answers to our questions and will inform an emerging vision for our ongoing spiritual awakening and liberation.

STRENGTHS INFORMED BY THE LEGACY OF ECM'S MISSION



GROUNDING BELIEFS GATHERED FROM ECM'S HISTORY AND CHOICES



Our Episcopal/Anglican lens invites us to see all life as sacred and worthy of dignity and justice. This understanding informs our Christian vocation and guides us as we face into the dynamics of power that enable access and liberation for all communities.



Prayer and action are inextricably linked. Contemplative and reflective practices foster an encounter with God's love and spirit that enable us to see ourselves and the world as sacred.



Our social change approach is oriented by God's Love and rooted in relationship building & accompaniment across division



Christian witness requires justice on personal, communal and systemic levels.



Leaders and communities most impacted by racial and economic injustice must have a voice in setting the direction for our action.

Episcopal City Mission's purpose is to build relationships of collective power for more just, whole and equitable urban communities in Massachusetts as an expression of God's transforming love. Our mission is expressed in three converging roles.

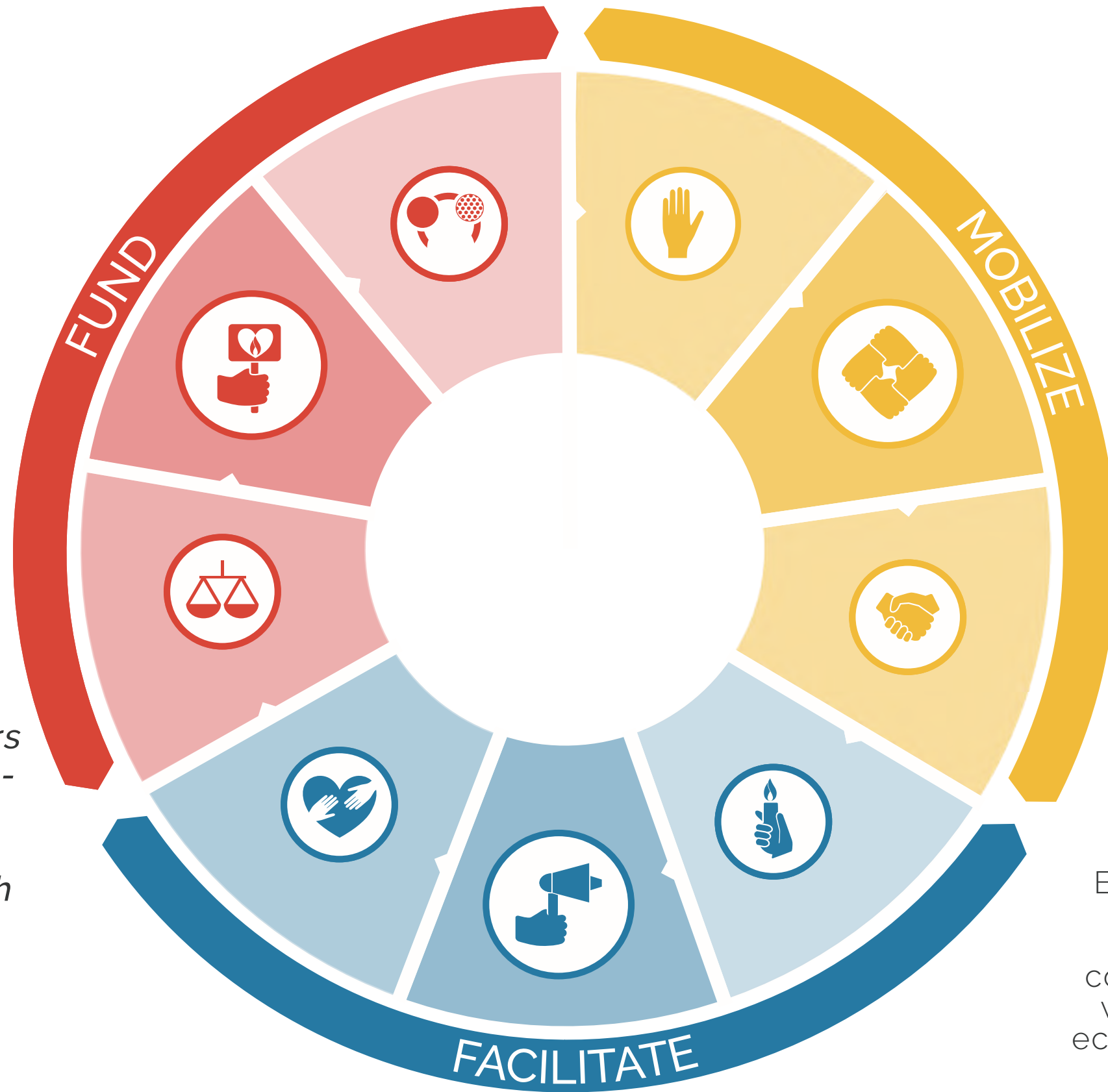
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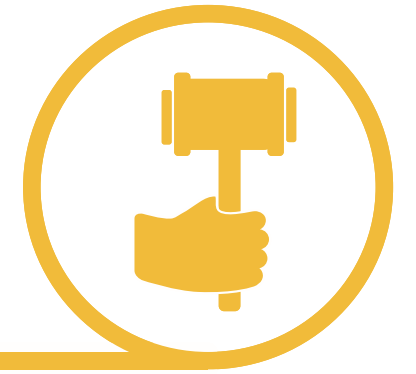
Funder:
ECM will fund grassroots and faith-based organizations who will lead economic, racial and immigrant justice in urban communities of Massachusetts

MISSION

ECM is a faith-rooted organization who partners with grassroots and faith-based organizations for economic, racial and immigrant justice through the integration of three roles: funder, mobilizer/convener and prophetic leadership facilitator.



2



Mobilizer/Convener:
ECM will gather and mobilize individuals and communities to strengthen the collective power of campaigns and movements for economic, racial and immigrant justice in Massachusetts.

3



Prophetic Leadership Facilitator:
ECM will develop and support Christian prophetic leaders, parishes and networked communities who will be more vocal, active and powerful for economic, racial and immigrant justice in Massachusetts.

Develop strategic partnerships with key grassroots and faith-rooted organizations

focused on economic, racial and immigrant justice that will inform our engagement strategy.

Engage individuals, Christian communities and faith-rooted networks in opportunities for strategic involvement in justice and movement-based action.

Engage parishes and individuals in diverse program models for prophetic leadership grounded in the experience of the Leadership Development Initiative (LDI). *See p. 21 for more.*

Expand the Morville House financial model by leveraging our capital for mission-related impact and expand our donor base.

Partner with our grassroots and faith-rooted partners to design learning communities that foster transformative relational engagement across division.

Develop a more integrated funding strategy that takes into account organizational impact, alliance building and innovation. Leverage strategy and funding partnerships with local progressive funders for greater collective impact.

Reclaim a prayerful and prophetic Christian narrative that is rooted in scripture and the stories of individuals and communities who are offer prophetic witness.



STRATEGY

Through these roles we will express God's transforming love and build relationships of collective power throughout Boston and the gateway cities of Massachusetts.

HIGHLIGHTS



STANDING ROCK, 2016

When the Reverend John Floberg, the Episcopal priest serving on the North Dakota side of the Standing Rock Reservation, issued a call for faith and justice leaders to join him in resistance to the proposed Dakota Access Pipeline, fifteen clergy and lay leaders from ECM's leadership network within the Diocese of Massachusetts were among those who answered the call acknowledging that challenges of Standing Rock are everywhere. Together, they stood in solidarity for sacred Lakota lands and Standing Rock's water supply, threatened by the pipeline and practices that deny life.



FALL GRANTEE GATHERING, 2016

On Saturday, Nov 19th at Christ Church, Needham, over 160 organizers from across New England came together for our 6th Annual Grantee Gathering, hosted in collaboration with the Haymarket People's Fund, The Hyams Foundation, and Third Sector New England's Inclusion Initiative. The Annual Grantee Gathering provided an opportunity for ECM's grantees to join other justice organizers across New England to learn from one another, share successes, offer support and solidarity, and brainstorm ways to build movements for justice.



ANNUAL MEETING, 2016

On October 22nd Episcopal City Mission gathered 50 parish-based leaders at St Peter's in Weston, MA for ECM's Annual Meeting. Our leaders engaged in the first phase of ECM's strategic planning process, asserting that we must address

systemic oppression, particularly as it manifests in the housing crisis and unjust immigration policies and practices. Attendees left the Annual Meeting with a renewed commitment to spiritual awakening and political engagement.



CELEBRATION & FAREWELL OF A BELOVED ECM LEADER

On Friday, December 16th, ECM gathered past and present members, partners, staff, and friends to celebrate Lucena Daley and her 34 years of ministry with Episcopal City Mission. Thank you to all of those who were present with us both in person and in spirit. A special thanks to those who shared their gratitude and stories of Lucena including: the Honorable Byron Rushing, Polly Dickson, the Right Reverend Bud Cederholm, the Reverend Norm Faramelli, and the Reverend Canon Ed Rodman.

IMMIGRATION GATHERINGS, 2017

Building the Solidarity & Sanctuary Network

On Saturday, January 14th, 120 people representing various communities and congregations in Massachusetts came together to imagine and create a Sanctuary and Solidarity Church Network in their state. ECM is grateful to work in partnership with: Massachusetts Communities Action Network (MCAN), Movimiento Cosecha, Nuevo Amanecer, Roxbury/Dorchester Mission Hub, Cathedral of St. Paul, MANNA, and St. Stephen's South End. Guided by the great commandment: to love God with all our minds, hearts and souls and to love our neighbors as ourselves, we hosted gatherings from January - March including: Know Your Rights trainings and opportunities for faith-rooted congregations and community partners to build a broad and rich network of Solidarity and Sanctuary.

IMMIGRATION PRESS CONFERENCE

On January 31st, Massachusetts Communities Action Network (MCAN), Episcopal City Mission, Jewish Community Relations Council (JCRC), Moral Movement MA, and UU Mass Action came together to host a press conference to discuss the ongoing Executive Orders that impact the immigrant community, Muslim community, and communities of color.



RESPONDING TO HATE

August Training in preparation for Boston Resistance

In response to the gatherings of white supremacists and neo-Nazis in Charlottesville the weekend of August 11th, ECM, in partnership with the Cathedral of St. Paul and MANNA, held a contemplative prayer vigil. ECM also partnered with MCAN and Moral Movement MA to host two gatherings to equip faith leaders preparing to respond in their communities in anticipation of the "Free Speech" gathering in Boston on August 19th.



ANNUAL CELEBRATION

Across Massachusetts communities there is division and confusion, action and solidarity. Our common ground and clarity is found when we come together. In the spirit of Pentecost, over 300 people from faith-rooted and grassroots communities gathered for an evening of prayer, food, reflection and action, heard a powerful word from the Bishop Dwayne Royster, and honored the Reverend Mariama White-Hammond, Grace Episcopal Church in Medford, and Rafaela Polanco and Piedad Janet Muñoz with our Annual ECM Awards.

GRANTS

BURGESS URBAN FUND

Central to our engagement with the wider community, the Burgess Urban Fund (BUF) supports grassroots community organizing working to address the systemic causes of urban poverty in Massachusetts. In 2016, ECM awarded grants to the following 19 organizations:

- Agencia ALPHA
- Asian American Resource Workshop
- Beantown Society
- Boston Tenant Coalition
- Brockton Interfaith Community
- Chinatown Community Land Trust
- Coalition for Social Justice
- Community Economic Development Center of Southeastern Massachusetts
- Dominican Development Center (Out of Cycle)
- Essex County Community Organization
- Lynn United for Change
- Matahari: Women's Worker Center
- MetroWest Worker Center
- Muslim Justice League
- Neighbors for a Better East Boston
- THRIVE
- United Neighbors of Fitchburg
- Women Encouraging Empowerment**
- Youth Justice and Power Union

**Recipient of fund from Episcopal Church Women, specifically designated to an organization working with and for women.

PARISH PARTNERSHIP GRANT PROGRAM

Every year ECM makes grants to parishes to support work that fights poverty and injustice in their local communities. We focus on groups that challenge systems allowing poverty to thrive in their local communities.

- Church of the Holy Spirit (Orleans) - Food 4 Kids
- common cathedral/Ecclesia (Boston)
- Grace Chapel (Brockton)
- MANNA (Boston)
- Nuevo Amanecer (East Boston)
- St. John's Episcopal Church (Holbrook) - St. John's After School Program
- St. Mary's Episcopal Church (Dorchester)
- St. Stephen's Episcopal Church (Lynn)
- St. Stephen's Episcopal Church (South End, Boston) - St. Stephen's Youth Program
- St. Thomas Episcopal Church/Common Ground: Center for Spiritual Practice (Taunton)



WIDER COMMUNITY PARTNERSHIP GRANT PROGRAM

Our Wider Community Partnerships are predominantly with faith-based organizations that are connecting faith communities to justice-based strategies for change. In the spring of 2016, ECM awarded grants to the following six organizations.

- Abolitionist Network, Emmanuel Gospel Center
- Boston Faith and Justice Network
- City Mission Society
- Massachusetts Council of Churches
- Partakers
- UU Mass Action

DIOCESAN GRANT PROGRAM

Through ECM's relationship with the Episcopal Diocese of Massachusetts, we support programs and initiatives at the Diocesan level that are addressing issues of racial and economic justice and prophetic leadership development. In 2016, ECM awarded grants to:

- Barbara C. Harris Episcopal Camp and Conference Center
- Life Together: Diomass Intern Program
- Leadership Development Initiative (LDI)

LDI INTEGRATION

Excerpts from A Letter from the Chair of the LDI Leadership Team

When I first recruited the LDI's founding leadership team, I never imagined that our work would blossom as it has over these past 8 years. We have developed leadership teams within 53 worshipping communities and trained hundreds of people. Our work has spread ecumenically and nationwide. LDI demonstrates that powerful change can happen when people take responsibility for enabling others to achieve shared purpose under conditions of uncertainty.

Today, when people of faith urgently need to embody love that brings about justice LDI is again listening deeply. Over the past year, under Natalie Finstad's guidance, we have carefully discerned where our work can best meet our community's need, and have assessed which organizational structure can best accommodate our growing ministry in the diocese of Massachusetts and beyond.

Our fiscal agent, collaborator and long-time funder, ECM, has also been discerning their response to this urgent moment. It has become clear to both the LDI Leadership Team and ECM's Executive Committee that our work is deeply integrated. LDI is drawn to ECM's emerging mission of deepening the church's response to immigration, racial justice and economic justice, and ECM intends to feature LDI's formation tools and practices as a critical centerpiece of their new strategic plan. As a result LDI will become part of ECM and we will be dropping our distinct public identity.

In solidarity and deep gratitude,
Ella Davila Auchincloss, MTS*
LDI Founder
Chair, LDI Leadership Team
Member, Executive Committee, Episcopal City Mission

*To read the whole letter, visit:
www.leadership-development-initiative.org



Grounding Our Roots

LDI over the last year has studied how the early Church followed Jesus, read Bonhoeffer's testament to the power of community, witnessed Jesus' relationship with the woman at the well, and drew from the Hebrew people's liberation through God, and developed two core theological/ecclesiological principles that ECM will hold moving forward:

- The Church is the living body of Jesus Christ; we are called to follow him, as his earliest disciples did, by living out God's ongoing movement of love, justice, and liberation in the world today.
- We most fully follow Jesus when we are part of a community. Through relationship with Christ and one another, we know ourselves as God's beloved and share that truth by dismantling and rebuilding structures that deny God's belovedness in one another.

FINANCES

Report from the Treasurer

As reflected on the attached Statement of Financial Position, Episcopal City Mission's total assets stood at \$26,166,434 as of December 31, 2016, with investments at a market value of \$18,707,404. The investment figure reflects an increase of roughly 9.4% relative to the 2015 year-end market value of ECM's investments portfolio. Of the total increase, 5.44% is attributable to positive investment performance, and the balance of the increase is attributable to additional contributions to the endowment. Most notably, fall of 2016, marked ECM's receipt of the gift from the Episcopal Church Women to establish the Burgess Urban Fund for Women. While the endowment saw a significant increase in value, during 2016, ECM received substantial payments towards the outstanding principal balance of its Morville House note, reducing the value of this holding as an asset of the organization. As a result of this principal note payment, and other factors, ECM's total assets saw only a modest increase in value from year-end 2015. For more detail, please review the preliminary financial reports accompanying this report.

As these figures demonstrate, ECM has benefited from generous gifts of both "time and treasure" throughout its history. ECM is deeply grateful for the many gifts it has received from our members, partners and supporters. ECM has also been blessed to receive a steady stream of income through its investment in, and work with, Morville House. Without these resources, ECM would not have been able to fund the millions of dollars that it has made in grants over the last forty years or more. Through these grants, ECM has been able to give voice to the many needs of the under-represented communities in our Diocese. ECM holds dear its legacy of using its wealth to empower those members of our community who are often left out in our political and economic structures.

Building on this rich legacy, ECM now looks to the future and asks how can we, as an organization, deepen our commitment to align our values with our financial resources? In answer to this question, the Executive Committee is pleased to announce the launch of a new "Mission Related Investment" strategy. Through this initiative, ECM will seek to make investments in the community which not only bring financial reward to ECM, but also strengthen under-represented neighborhoods and constituencies in our Diocese. ECM's initial focus will be on making further investments in affordable housing. Currently, there is a dire need for affordable housing in both the City of Boston and the Commonwealth of Massachusetts. Through Morville House, ECM has developed resources and a network of contacts that make the organization uniquely situated to expand its investment in affordable housing. ECM's goal is to put these resources and contacts to work in 2017!

As ECM launches this initiative, we ask for your on-going prayers and support as ECM discerns how best to deploy its wealth so that ECM's finances not only fill its coffers, but also enrich our communities and strengthen our civic life together in Christ.
Respectfully,

Andree Saulnier, Treasurer

STATEMENT OF ACTIVITIES

For The Year Ended December 31, 2016-*

For The Year Ended December 31, 2015

Income	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Total
Interest and dividends, net of fees	\$244,734	\$66,547	-	\$311,281	\$204,591	\$58,519	\$263,110
Contributions from individuals, parishes & organizations	\$83,576	-	-	\$83,576	\$111,188	\$8,354	\$119,542
Diocesan grants	-	\$30,000	-	\$30,000	-	\$30,000	\$30,000
Gift from Episcopal Church Women of the Diocese of Massachusetts (ECW)	-	-	\$407,127	\$407,127	-	-	-
Other income	\$10,208	\$793	-	\$11,001	\$12,067	\$640	\$12,707
Net assets released from restrictions	\$152,039	(\$152,039)	-	-	\$85,019	(\$85,019)	-
Total operating income	\$490,557	\$54,699	\$407,127	\$842,985	\$412,865	\$12,494	\$425,359
Expenses							
Community and Economic Development	\$363,102	-	-	\$363,102	\$362,613	-	\$362,613
Parish and Diocesan Programs	\$267,339	-	-	\$267,339	\$173,322	-	\$173,322
Housing Related Programs	\$58,656	-	-	\$58,656	\$56,976	-	\$56,976
Public Policy	\$97,067	-	-	\$97,067	\$66,376	-	\$66,376
Constituent Education	\$118,170	-	-	\$118,170	\$176,093	-	\$176,093
Administration	\$399,595	-	-	\$399,595	\$383,852	-	\$383,852
Total expenses	\$1,303,929	-	-	\$1,303,929	\$1,219,232	-	\$1,219,232
Change in net assets from operations	(\$813,372)	(\$54,699)	\$407,127	(\$460,944)	(\$806,367)	\$12,494	(\$793,873)
Other Income							
Ground lease fee and accrued interest	\$193,935	-	-	\$193,935	\$193,935	-	\$193,935
Accrued interest on mortgage	\$221,726	-	-	\$221,726	\$283,168	-	\$283,168
Other income	-	\$100,781	-	\$100,781	-	-	-
Realized gain (loss) on sale of investments	\$474,639	\$142,884	-	\$617,523	\$848,583	\$257,683	\$1,106,266
Increase (decrease) in unrealized gain	(\$8,585)	\$1,568	-	(\$7,017)	(\$890,794)	(\$275,654)	(\$1,166,448)
Total non-operating income	\$881,715	\$245,233	-	\$1,126,948	\$434,892	(\$17,971)	\$416,921
Change in net assets	\$68,343	\$190,534	\$407,127	\$666,004	(\$371,475)	(\$5,477)	(\$376,952)

STATEMENT OF FINANCIAL POSITION

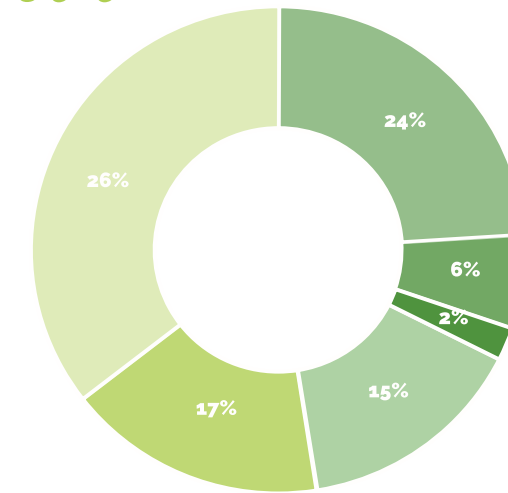
Assets

Investments at market value at year end	\$18,707,404	\$17,124,109
Other assets	\$7,460,255	\$8,794,968
Total assets	\$26,167,659	\$25,919,077
Liabilities and Net Assets		
Liabilities	\$144,980	\$562,402
Net assets:		
Unrestricted	\$21,433,675	\$21,400,043
Temporarily restricted	\$2,457,210	\$2,201,965
Permanently restricted	\$2,161,794	\$1,754,667
Total net assets	\$26,022,679	\$25,356,675
Total liabilities & net assets	\$26,167,659	\$25,919,077

* Internally prepared. Audited reports will be available in the Fall of 2017

OPERATING INCOME

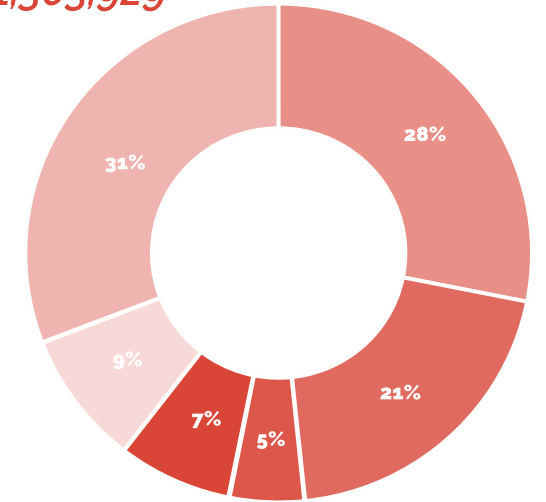
\$1,303,929



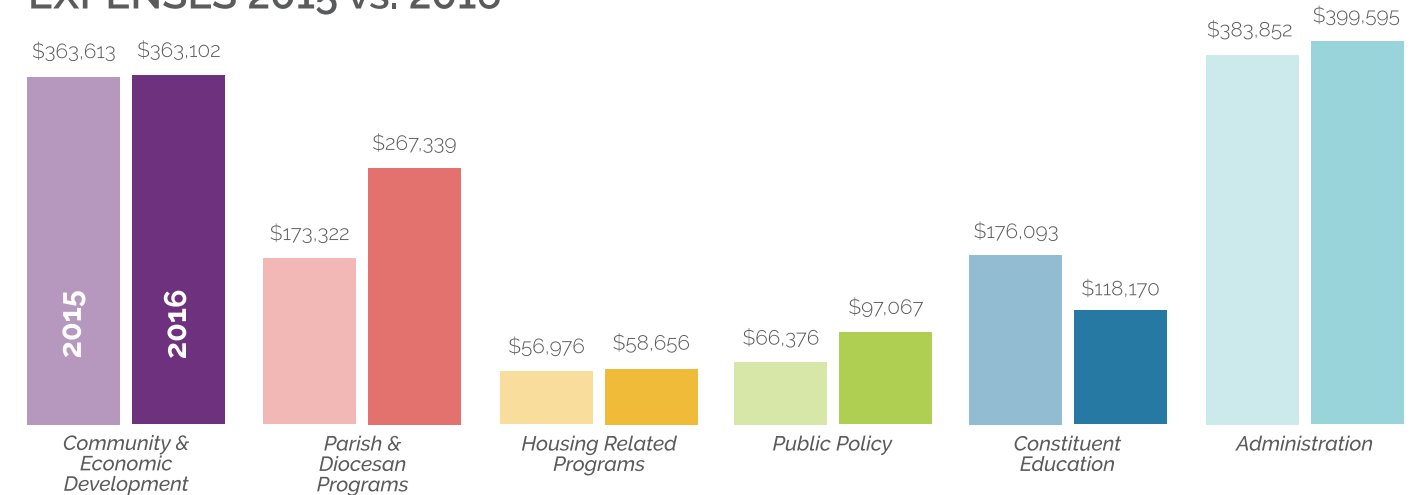
Interest and dividends, net of fees	\$311,281	Community and Economic Development	\$363,102
Contributions from individuals, parishes & organizations	\$83,576	Parish and Diocesan Programs	\$267,339
Diocesan grants	\$30,000	Housing Related Programs	\$58,656
Ground lease fee and accrued interest	\$193,935	Public Policy	\$97,067
Accrued interest on mortgage	\$221,726	Constituent Education	\$118,170
Other revenue	\$463,411	Administration	\$399,595

EXPENSES

\$1,303,929



EXPENSES 2015 vs. 2016



TOTAL LIABILITIES & NET ASSETS

2015 **\$25,919,077** 2016 **\$26,167,659**

STAFF



The Rev'd Arrington Chambliss, Executive Director

Arrington was the co-founder and former Executive Director of Life Together. Ordained to Episcopal Priesthood in 2004, she served five years as Assistant/Associate Rector with the Church of St. Andrew in Marblehead, MA. Prior to ordination, she founded No Ordinary Time, an organization that worked primarily with young activists, artists and faith-based leaders to integrate reflection and contemplative practice into their social justice work. She is particularly interested in the intersection between the inner work of contemplative prayer, reflection and healing and the outer work of nonviolent action, reconciliatory dialogue, and community organizing. She lives with her family in Jamaica Plain, MA.



Natalie Finstad, Director of Leadership and Engagement

Natalie began her professional career as a community organizing fellow with Life Together, a program for young adults in the Episcopal Church. Here, Natalie experienced how organizing can simultaneously seek collective justice and develop an individual awareness of agency. This inspired Natalie to lead organizing movements in Boston, New Zealand and Nairobi, Kenya. In Kenya, Natalie was an Episcopal Missionary and worked with young adults to found Tatua Kenya. Most recently, Natalie was the Executive Director for the Leadership Development Initiative. Natalie worked extensively as a teacher and consultant with organizations such as: The Harvard Kennedy School, St. Paul's Richmond, Planned Parenthood, and the Global Episcopal Missionary Network. Natalie was a featured speaker at TEDx Beacon Street. Natalie is a postulant for the Diaconate in the Diocese of Massachusetts and an Episcopal Church Fellow. Natalie enjoys traveling, staying active, hosting dinner parties, and reading memoirs.



Ramani Sripada, Director of Grants and Learning

Ramani is a human rights and social justice activist. She has professional background in public health and has led and participated on a variety of partnerships, coalitions and advisory committees on local, regional and national levels. Ramani is skilled in community organizing, strategic planning, organizational development, grant making, research and evaluation. She received a BA in Social Thought and Political Economy from the University of Massachusetts, Amherst, MA, and a MA in Applied Urban Anthropology from City College, New York, NY. She served as Deputy Director of MA Asian & Pacific Islanders for Health (MAP) for twelve years providing HIV/AIDS prevention education and managed a CDC-funded National and East Coast Regional API HIV/AIDS Capacity Building Program. Ramani held the position of Program Officer at MetroWest Health Foundation, overseeing Racial and Ethnic Health Disparities and Childhood Obesity Prevention Initiatives and was Director of Programs and Services at Associated Grant Makers (AGM), and most recently held the position of Deputy Director at MA Alliance on Teen Pregnancy Prevention.



Yani Burgos, Grants and Network Weaver

After being introduced to community organizing as a teenager, Yani has committed her life to community-led social change. Prior to Episcopal City Mission, she worked with Mothers Out Front, supporting the mobilization of mothers, grandmothers, and other caregivers to ensure a swift transition away from fossil fuels. She is interested in how communities work to create creative, sustainable practices and strategies for change. Yani lives in Quincy, and enjoys finding innovative ways to use a slow cooker, chanting on the beach at sunrise, and searching for the latest and greatest in sneaker fashion trends.



Vesta Scotland, Interim Operations Manager

Vesta Scotland currently works for Episcopal City Mission as the Interim Operations Manager. Over the years she has worked in a variety of industries as an Executive Assistant/Office Manager. She attended Northeastern University to pursue a B.A. Degree in Organizational Communications and New England College of Finance for Accounting and Finance/Business Management. She is passionate about ECM's mission, and is an advocate for economic and social justice, solidarity and sanctuary. When Vesta is not working she is pursuing her other God's gifts and talents such as event planning, singing, drawing, dancing, creating and designing arts and crafts.



Caroline Weeks, Life Together Social Justice Fellow

Caroline Weeks is a Life Together fellow thrilled to learn more about community organizing and join the wonderful Episcopal City Mission team! Caroline graduated from New York University with a degree in English Literature and Creative Writing. At NYU, she was Co-Events Coordinator and Director of Communications for Active Minds, a mental health awareness and stigma-fighting student organization. She has edited and contributed to literary magazines at Thomas University and NYU, and has organized and participated in poetry readings. Caroline is a Georgia native who writes, reads, bakes, and does yoga in her spare time.



COMMITTEES

EXECUTIVE COMMITTEE

Bishops

*The Right Reverend Alan M. Gates, President
The Right Reverend Gayle E. Harris, Vice President*

Officers

*The Reverend Noah Evans, Chair (2016)
Erin Alarcon, Vice Chair (2016), Chair (2017)
The Reverend Dr. Lisa Fortuna, Member (2016),
Vice Chair (2017)
Louise Gant, Secretary
Andree Saulnier, Treasurer
The Reverend R. Arrington Chambliss, Executive Director*

Members

*Ella Auchincloss
The Reverend Edward M. Cardoza
The Reverend Jacqueline Clark
The Reverend Marisa Egerstrom
James Gammill
William Haynsworth
The Reverend Edwin D. Johnson
Hazel Johnson
Dr. Alexandra Piñeros-Shields
Dr. Margaret A. Post
The Reverend Moses O. Sowale
The Reverend Matthew Stewart*

MORVILLE HOUSE

*William Haynsworth,
President
Eileen O'Brien
Catherine Riley
Susan Smith
Richard Xu
Dorothy Hibbard
Erin Alarcon*

LEGAL AUDIT COMMITTEE

Erin Alarcon

BURGESS URBAN FUND

*The Reverend Matt Stewart,
Chair
The Reverend Jacqueline Clark
Dylan Hillerbrand
The Reverend Edwin D. Johnson
Barbara Waterhouse
The Reverend Mariama White-Hammond
Luz Zambrano*

PARISH GRANT COMMITTEE

*The Reverend Edward Cardoza, Chair
Carolyn Chou
The Reverend Lisa Fortuna*

WIDER PARTNERSHIPS

*Erin Alarcon
The Reverend Zenetta Armstrong
Katie Campbell Simons
Dr. Alexandra Pineros-Shields
The Reverend Sam Rodman*

STAFF AND COMMITTEES

Staff

*Yani Burgos, Parish Grants and Network Weaver
Katie Campbell Simons, Associate Director for
Community Partnerships and Public Policy (2016-
2017)
The Reverend Arrington Chambliss, Executive
Director
Lucena Daley, Operations Manager (2016)
Mary Beth Mills-Curran, Coordinator of Church
Based Ministries (2016)
Ashton Murray, Life Together Fellow (2015-2016)
Sarah Alphin, Life Together Fellow (2016-2017)*

FINANCE & AUDIT COMMITTEE

*Andree Saulnier, Chair
The Reverend Noah Evans
James Gammill
William Haynsworth
Kristen Stewart*

NOMINATING COMMITTEE

*The Reverend Edwin D. Johnson, Chair
The Reverend Noah Evans*

PERSONNEL COMMITTEE

Louise Gant

“Solving the crises we face isn’t simply a matter of having the right facts, graphs, policy analyses, or funding. And I no longer believe we can “win” justice simply by filing lawsuits, flexing our political muscles or boosting voter turnout. Yes, we absolutely must do that work, but none of it — not even working for some form of political revolution — will ever be enough on its own. Without a moral or spiritual awakening, we will remain forever trapped in political games fueled by fear, greed and the hunger for power. American history teaches how these games predictably play out within our borders: time and again.”

— Dr. Michelle Alexander
*legal scholar, civil rights attorney
and author of The New Jim Crow*

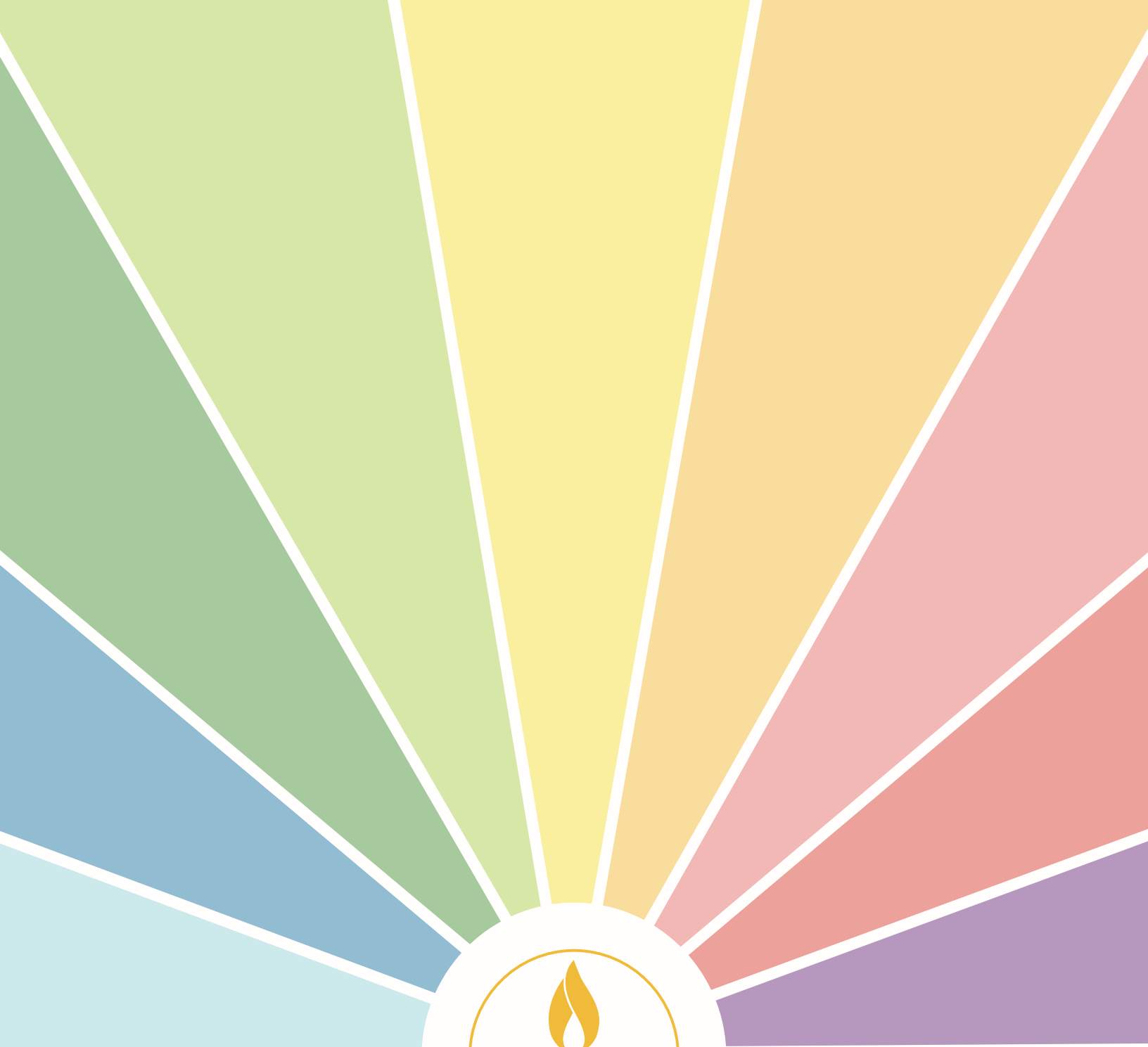


Image of a city speaks to ECM's name, as well as their role in connecting & convening diverse ecosystems

The flame represents light, liveliness & the Holy Spirit's work & movement in the world.

The rainbow alludes to multiplicity, inclusion, vitality and hope.

Grouping of buildings connects with ECM's work in affordable housing.

The image can also read collectivity. We are stronger and more powerful working for the realm of God together

ABOUT THE NEW LOGO



Margaret Coffin Prayer Book Society
Episcopal Diocese of Massachusetts

President - Mrs. Douglas B. Harding (Susan)
7 Longmeadow Road, Lincoln MA 01773 781-259-0968
Clerk - The Rev. Richard T. Loring, 114 Badger Terrace, Bedford, MA 01730 Tel. 781/275-0656

April 14, 2016

Ms. Laura Simons
Convention Office, Diocese of Mass.
138 Tremont Street
Boston MA 02111

Dear Laura:

Here's the report of the Margaret Coffin Prayer Book Society for the year 2015, for inclusion in the 2015 Diocesan Journal (or 2016 if 2015 has already gone to press); the material in the first paragraph repeats each year:

REPORT OF THE MARGARET COFFIN PRAYER BOOK SOCIETY FOR 2016

The Margaret Coffin Prayer Book Society is the only organization in New England for the free distribution of the Book of Common Prayer and the Hymnal, and continues the work of a little-known Boston woman, Margaret Coffin (1769-1855), who was confirmed when Bishop Samuel Seabury held the first such service ever held in Boston, at Christ Church (Old North), March 29, 1786. She loved the Prayer Book, which she referred to as the "second greatest book in the world." (Her personal Prayer Book is in the Diocesan Library.) She became convinced that the best witness to her faith was to give away Prayer Books to friends, and especially to the destitute who could not afford them. Her self-effacing evangelism was made permanent by provision in her will. The Society was established in 1856, the year after her death, and continues this work to the present, now approaching 160 years since its founding.

The Officers of the Society are Mrs. Douglas B. Harding (Susan), President; the Rev. Robert B. Edson, Vice-President; F. Davis Dassori, Treasurer; and the Rev. Richard T. Loring, Clerk,

Since the last Report to Convention, dated April 18, 2015, the Society has distributed

to the Anglican Diocese of Tanga, Tanzania for a new church in the village of Bungu, 65 Prayer Books and 75 Hymnals, costing \$1100.

The church is dedicated to St. Frank Weston.

Several other requests have come to us, 3 in Massachusetts and one in Florida and are awaiting the Bishops' consent; they involve Prayer Books and "Lift Every Voice and Sing", and amount to some \$2352.

Requests for Prayer Books and/or Hymnals may be made to the Society, in care of the President Mrs. Douglas B. (Susan) Harding, at 7 Longmeadow Road, Lincoln MA 01773, tel. 781-259-0968. We provide free Prayer Books and/or Hymnals in request, with a Bishop's endorsement, to parishes, missions and institutions, at home and abroad, when they are unable to purchase them.

Richard T. Loring

The Rev. Richard T. Loring, Clerk
Margaret Coffin Prayer Book Society
April 14, 2016

Freely distributing the Book of Common Prayer for one hundred fifty years.

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 DIOCESE of MASSACHUSETTS

Annual Meeting Minutes - March 03, 2016

The annual meetings of the Officers, Trustees and Directors of the Societies were held jointly on Thursday, March 03, 2016, in the Lawrence Room at the Diocese. The Rt. Rev. Gayle E. Harris opened the meeting with prayer at 12:40 pm. Present were: Bishop Harris, the Rev. Robert Edson, the Rev. Marshall Hunt, Tim Hunt, Suzette Phillips, Gerry Sullivan, Marilyn Swain, Alan West and the Rev. Deborah Woodward.

The minutes of the annual meetings of the Societies held on March 10, 2015 were presented by Bishop Gayle Harris. The acceptance of the Minutes was moved, seconded and unanimously voted:

That the minutes of the March 10, 2015 Annual meeting of the Society for the Relief of Aged or Disabled Episcopal Clergy and the Annual Meeting of the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Diocese of Massachusetts be accepted as distributed and placed on file. (Attachment A)

The deaths of Mrs. Carolyn (the Rev. Theodore) Bowers, Mrs. Josephine (the Rev. Gerald), and, Mrs. Anita (the Rev. James) Humphrey Lowery were noted by Suzette Phillips and a prayer for them and their families was offered.

The report of the 2015 distribution of grants for the relief of aged or disabled Episcopal clergy was presented by Bishop Harris, showing \$52,650 in Relief Assistance Grants, and \$58,500 in Insurance Preference Grants. It was moved, seconded and unanimously voted:

That the Report of 2015 Distribution of Grants by the Society for the Relief of Aged or Disabled Episcopal Clergy be accepted and placed on file. (Attachment B, Ivory)

The report of the 2015 distribution of grants for the relief of widows, widowers and orphans was presented by Bishop Harris, showing \$31,649 in Relief Assistance Grants, and \$42,575 in Supplemental Insurance Preference Grants. It was moved, seconded and unanimously voted:

That the Report of 2015 Distribution of Grants by the Society for the Relief of Widows, Widowers and Orphans be accepted and placed on file. (Attachment C, Lilac)

Gerry Sullivan presented the treasurer's report for the Society for the Relief of Aged or Disabled Episcopal Clergy. It was moved, seconded and unanimously voted:

That the Treasurer's Report for the Society for the Relief of Aged or Disabled Episcopal Clergy for 2015 be accepted as presented and placed on file. (Attachment D, Ivory)

The Treasurer's report for the Society for the Relief of Widows, Widowers, and Orphans of Clergy was reviewed. It was moved, seconded and unanimously voted:

That the Treasurer's Report for the Society for the Relief of Widows, Widowers, and Orphans of Clergy for 2015 be accepted as presented and placed on file. (Attachment E, Lilac)

Gerry Sullivan then presented the auditor's reports and financial statements prepared by Jay Stott for both societies, for the year 2015. It was noted that everything was found to be in good order. It was moved, seconded and unanimously voted:

That the report of the auditor for the Society for the Relief of Aged or Disabled Episcopal Clergy be accepted and placed on file. (Attachment F, Ivory)

And:

That the report of the auditor for the Society for the Relief of Widows, Widowers and Orphans of Clergy be accepted and placed on file. (Attachment G, Lilac)

Bishop Harris presented the nominations for Officers and Trustees of the Society for the Relief of Aged or Disabled Episcopal Clergy. There being no further nominations, it was moved, seconded and unanimously voted:

That nominations be closed.

It was moved, seconded and unanimously voted:

That the following persons be elected Officers and Directors of the Society for the Relief of Aged or Disabled Episcopal Clergy and that one vote be cast by the Secretary for their election.

Officers: The Right Reverend Alan M. Gates, President
 The Right Reverend Gayle E. Harris, Vice President
 Mr. Timothy Hunt, Treasurer
 Mr. Gerry Sullivan, Assistant Treasurer
 The Reverend Deborah M. Woodward, Secretary
 Ms. Suzette Phillips, Assistant Secretary

Directors: The Reverend Robert Edson
 The Reverend Marshall W. Hunt
 Mrs. Marilyn Swain
 Mr. Alan West

(Attachment H, Ivory)

Bishop Harris presented the nominations for Officers and Trustees of the Society for the Relief of Widows, Widowers and Orphans. It was moved, seconded and unanimously voted

That the nominations be closed.

It was moved, seconded and unanimously voted:

That the following persons be elected Officers and Trustees of the Society for the Relief of Widows, Widowers and Orphans of Clergy, and that the Secretary cast one vote for their election.

Officers: The Right Reverend Alan M. Gates, President
 The Right Reverend Gayle E. Harris, Vice President
 Mr. Timothy Hunt, Treasurer
 Mr. Gerry Sullivan, Assistant Treasurer
 The Reverend Deborah M. Woodward, Secretary
 Ms. Suzette Phillips, Assistant Secretary

Trustees The Reverend Robert Edson
 The Reverend Marshall W. Hunt
 Mrs. Marilyn Swain
 Mr. Alan West

(Attachment I, Lilac)

It was moved, seconded and unanimously voted:

That the following Directors and Officers serve on the emergency Finance and Grants Committee for the Society for the Relief of Aged or Disabled Episcopal Clergy during 2016.

The Right Reverend Gayle E. Harris	Mr. Gerry Sullivan
The Rev. Marshall Hunt	Mr. Timothy Hunt
Mr. Alan West	

It was moved, seconded and unanimously voted:

That the following Officers and Trustees serve on the emergency Finance and Grants Committee for the Society for the Relief of Widows, Widowers and Orphans during 2016.

The Right Reverend Gayle E. Harris	Mr. Gerry Sullivan
The Rev. Marshall Hunt	Mr. Timothy Hunt
Mr. Alan West	

Gerry Sullivan proposed Mr. Jay Stott, Diocesan Parish Audit Report Coordinator continue as the auditor for both Societies. It was moved, seconded and unanimously voted:

That the Society for the Relief of Aged and Disabled Episcopal Clergy appoint Mr. Jay Stott as the auditor for 2016.

And:

That the Society for the Relief of Widows, Widowers and Orphans of Clergy appoint Mr. Jay Stott as the auditor for 2016.

Bishop Harris presented the proposed 2014 Relief Assistance and Insurance Preference Grants. The bishop explained that at least one additional grant for the Rev. J.C. Woods will need to be added after he meets with her. He has recently retired and is legally blind. It was moved, seconded and unanimously voted:

That the proposed 2016 Relief Grants and Supplemental Health Insurance Preference Grants for the Society for the Relief of Aged or Disabled Clergy as outlined in Bishop Harris's Memorandum to the Society with the proposed increase for J.C. Woods be accepted.
(Attachment J, Ivory)

It was moved, seconded and unanimously voted:

That the proposed 2016 Relief Grants and Supplemental Health Insurance Preference Grants for the Society for the Relief of Widows, Widowers and Orphans of Clergy as outlined in Bishop Harris's Memorandum to the Society be accepted.(Attachment K, Lilac)

Gerry Sullivan reviewed the 2016 budget for the Society for the Relief of Aged and Disabled Episcopal Clergy. It was moved, seconded and unanimously voted:

That the proposed 2016 budget, for the Society for the Relief of Aged and Disabled Episcopal Clergy with the additional grant be approved. (Attachment D, Ivory)

The budget for the Society for the Relief of Widows, Widowers and Orphans of Clergy was presented. It was moved, seconded and unanimously voted with the approved addition:

That the 2016 budget for the Society for the Relief of Widows, Widowers and Orphans of Clergy be approved. (Attachment E, Lilac)

Other Discussions/Reports:

Statistical Reports (*Attachment L, White*)

The board reviewed the Grants History for both Societies. Suzette Phillips noted that the statistical report for 2016 indicates that over 50% (21 of the 38 clergy recipients) are aged 80-97 and over 60% (22 of the 35 widow recipients) are aged 80-99.

Suzette also informed the board that the Society for the Relief of Aged and Disabled Clergy received the final disbursement of \$3,750.73 from the estate of the Rev. Rudolph Roell. This brings the total of his bequest to \$90,750.73.

We set March 16, 2017 at noon as the Annual Meeting date.

There being no further business, the meeting was adjourned.

Respectfully submitted,

Suzette Phillips, Assistant Secretary

2016 REPORT OF THE BOSTON EPISCOPAL CHARITABLE SOCIETY

On Easter Monday, 1724, a little company of Church of England men founded the Boston Episcopal Charitable Society. The mission of the Society is to carry on the vision and compassion of the founders of the Boston Episcopal Charitable Society when they received their charter from the King of England in 1724. For nearly 300 years the Society has improved the lives of elderly and needy Episcopalians in Greater Boston by providing ongoing supplemental financial support. In recent years, working with Episcopal parish priests, we have also sought to identify disadvantaged individuals of all ages whose self-sufficiency, feeling of self-worth and compassion for others could be improved by receiving short-term financial assistance from the Society. We have also widened our giving area beyond Greater Boston. While we will never neglect our initial and primary purpose, our experience to date in short-term assistance has been very gratifying.

At the end of 2016 the Society was providing quarterly assistance to 20 beneficiaries and, with the help of area parishes, had made one-time grants to help another 13 individuals who were in need of short-term financial assistance. At the end of the year we had distributed over \$146,000 in quarterly and one-time grants and an additional grant to Church of the Holy Spirit Mattapan in memory of Elizabeth Moten, a long-time trustee who passed away in 2016. The Trustees voted to again distribute block grants totaling \$100,000 to area parishes. Using these funds priests from 11 parishes were able to help many individuals or families facing the inability to pay for their most basic living necessities.

Members are nominated and elected at the Society's Annual Meeting held annually on the first Tuesday in June. The Society currently has approximately 65 members. Each member must be a member of the Episcopal Church and be a resident of the Commonwealth of Massachusetts. We are actively seeking new members.

The Society strongly encourages parish priests to let us know if there are individuals in their congregation who might be in need of financial help, either on a one-time or quarterly basis. If you are interested in learning more about the Society, you are invited to contact our administrator, Nina Faragher, at Suite 600, Ten Post Office Square, Boston, Massachusetts 02109, 617-426-6051, or boston.episcopal.1724@gmail.com.

Officers:

The Rt. Rev. Gayle Elizabeth Harris, Chairperson
The Rev. Thomas B. Kennedy, President
Amanda McGrady Morrison, Secretary
Charles C.J. Platt, Treasurer

Trustees: Officers and the Following

Alexander T. Bok
Robert S. Hurlbut, Jr.
David S. Lee
Sarah W. Wilcox

**CLERGY RECORDS
2016**

ORDINATIONS TO THE TRANSITIONAL DIACONATE

06/04/16 Zachary Brooks
 Marisa Egerstrom
 Isaac Everett
 Christopher Whiteman
 Charles Wynder

ORDINATIONS TO THE VOCATIONAL DIACONATE

06/04/16 Thomas Bartlett
 Philip Flaherty
 Robert Greiner
 Kristine Holmes
 Elizabeth Jordan

ORDINATION TO THE PRIESTHOOD

01/06/16	Vincent Michael Bousquet	Gates
01/09/16	Eric Litman	G. Harris
01/09/16	Yolanda Rolle	G. Harris
01/30/16	Aileen DiBenedetto	Budde
02/27/16	Catherine Healy	Gates
07/23/16	David Prentice	Gates
12/10/16	Zachary Brooks	Martins
12/11/16	Charles Wynder	Budde

DEATHS

01/24/16 Alanson Houghton
06/03/16 Carl Bergstrom
06/07/16 Colin Gracey
06/15/16 Cornelius Hastie
09/26/16 Lyle Hall
10/14/16 Kendrick Child
10/16/16 Brian Murdoch
11/18/16 John Thomas
11/28/16 James Nelson
12/24/16 Richard Downes

TITLE IV ACTIONS

11/27/16 Stephen Smith Suspension ended

RECEIVED FROM OTHER DIOCESES

01/15/16 Bryan Pearson from Canada
01/19/16 Nancy Gossling from Connecticut
01/25/16 Karen Fraoli from Rhode Island
01/28/16 Thomas Ferguson from Milwaukee
02/02/16 Melanie McCarley from West Virginia
02/12/16 Mark Anschutz from Dallas
04/15/16 John Beach from Convocation of American Churches in Europe
04/27/16 Kevin Sparrow from California
08/04/16 Lauren McLeavey from Long Island
08/08/16 William Parnell from New York
08/29/16 Andrea Taylor from Southwest Florida
09/27/16 Kapya Kaoma from Central Africa
09/27/16 Sean Leonard from Western New York
09/28/16 Joseph Mumita from Kenya
10/18/16 James Weldon from Georgia

TRANSFERRED TO OTHER DIOCESES

03/17/16 Frederick Moser to Vermont
03/31/16 Brian Rebholtz to Northern California
04/21/16 Charlotte LaForest to Connecticut
04/27/16 Stephen Trever to California
06/08/16 Richard Signore to Western Massachusetts
07/06/16 Patrick Cheng to New York
07/15/16 Aileen DiBenedetto to Western Massachusetts
08/16/16 Jeffrey Dodge to California
12/12/16 Zachary Brooks to Springfield

RETIREMENTS

01/01/16 Barbara Smith-Moran
03/01/16 Suzanne Colburn
04/01/16 Stephen Voysey
06/01/16 Susan Schwab
06/01/16 Bruce Nickerson
07/01/16 Anthony Buquor
07/01/16 Cynthia Hubbard
07/01/16 Philip Jacobs

Postulants and Candidates for Holy Orders as of October 26, 2016

Candidates

<u>Name</u>	<u>Sponsoring Church</u>
Zachary Brooks	Church of the Redeemer, Chestnut Hill
Marisa Egerstrom	Church of St. John the Evangelist, Boston
Isaac Everett	Cathedral Church of St. Paul, Boston
Emily Garcia	The Episcopal Chaplaincy at Harvard, Cambridge
Patrick LaFortune	St. Stephen's Memorial Church, Lynn
Christopher Whiteman	St. Mary's Church, Dorchester
Charles Wydner	Church of the Holy Spirit, Mattapan

Postulants

<u>Name</u>	<u>Sponsoring Church</u>
Daniel Bell	St. Stephen's Memorial Church, Lynn
Mia Benjamin	Grace Church, Medford
Sue Correira	Church of the Holy Spirit, Fall River
Harry Easterly	St. Gabriel's Church, Marion
Hilary Greene	St. Mary's Church, Barnstable
Nicholas Hayes	St. James's Church, Cambridge
Natalie Finstad	St. Christopher's Church, Chatham
Duncan Hilton	Church of the Good Shepherd, Watertown
Sonia Hodge	St. Thomas's Church, Taunton
Hazel Johnson	St. Stephen's Memorial Church, Lynn
Gregory Johnston	The Episcopal Chaplaincy at Harvard, Cambridge
Bernie Jones	Trinity Church, Newton Centre
Christopher Jones	Church of the Redeemer, Chestnut Hill
Sarabnh Levy-Brightman	St. John's Church, Charlestown
Amanda March	St. Paul's Church, Brookline
Isaac Martinez	St. James's Church, Cambridge
Paul McAllister	Cathedral Church of St. Paul, Boston
Jennifer McCracken	Christ Church, Needham
Helen McKinney	Emmanuel Church, Boston
Marilyn McMillan	St. Barnabas's Church, Falmouth
Mary Beth Mills-Curran	St. James's Church, Cambridge
Daphne Ning Zhao	All Saints Parish, Brookline
Ruthann Savage-King	Grace Church, Newton
Amy Whitcomb Slemmer	St. Stephen's Church, Cohasset
Charles Stang	St. John's Church, Charlestown
James Thomas	St. John's Church, Sandwich
Tamra Tucker	Emmanuel Church, Boston
Jennifer Vath	St. Paul's Church, Lynnfield
Atem Yak	Grace Church, Everett

**Episcopal Visitations
2015 - 2016 Liturgical Year**

Church	Date	Bishop
Arlington, Church of Our Saviour	12/6/2015	Gates
Attleboro, All Saints' Church	12/13/2015	Harris, G.
Bedford, St. Paul's Church	9/25/2016	Gates
Belmont, All Saints' Church	4/10/2016	Gates
Beverly Farms, St. John's Church	1/10/2016	Gates
Boston, Church of St. Augustine and St. Martin	12/20/2015	Harris, G.
Braintree, Emmanuel Church	6/12/2016	Gates
Buzzards Bay, St. Peter's Church	4/3/2016	Harris, G.
Cambridge, St. Bartholomew's Church	1/24/2016	Harris, G.
Cambridge, St. Peter's Church	4/17/2016	Gates
Danvers, All Saints Episcopal Church of the North Shore	12/6/2015	Harris, G.
Dartmouth, St. Aidan's Chapel	7/10/2016	Harris, G.
Dorchester, Parish of All Saints	12/6/2015	Cederholm
Foxborough, St. Mark's Church	10/2/2016	Harris, G.
Franklin, St. John's Church	9/18/2016	Cederholm
Haverhill, Trinity Church	12/13/2015	Cederholm
Holbrook, St. John's Church	10/30/2016	Harris, G.
Hyannis Port, St. Andrew's Chapel	6/19/2016	Gates
Ipswich, Ascension Memorial Church	9/11/2016	Gates
Lexington, Church of Our Redeemer	5/15/2016	Harris, G.
Malden, St. Paul's Church	5/1/2016	Gates
Medway, Christ Church	11/20/2016	Harris, G.
Milton, St. Michael's Church	1/31/2016	Harris, G.
New Bedford, St. Andrew's Church	1/31/2016	Gates
Newton Lower Falls, St. Mary's Church	9/11/2016	Harris, G.
Newtonville, St. John's Church	10/2/2016	Gates
North Attleborough, Grace Church	2/7/2016	Harris, G.
Osterville, St. Peter's Church	10/30/2016	Gates
Plymouth, Christ Church	4/10/2016	Harris, G.
Quincy, Parish of St. Chrysostom	3/6/2016	Harris, G.
Randolph, Trinity Church	10/16/2016	Harris, G.
Rockland, Trinity Church	5/22/2016	Gates
Roxbury, St. John St. James Church	5/1/2016	Harris, G.

Church	Date	Bishop
Salem, Grace Church	6/5/2016	Gates
Saugus, St. John's Church	2/21/2016	Gates
Somerville, St. James's Church	10/23/2016	Gates
South Weymouth, Church of the Holy Nativity	12/20/2015	Gates
Stoneham, All Saints' Church	5/15/2016	Gates
Taunton, St. Thomas's Church	3/20/2016	Gates
Topsfield, Trinity Church	3/20/2016	Harris, G.
Wakefield, Emmanuel Church	10/23/2016	Harris, G.
Walpole, Epiphany Church	1/3/2016	Gates
Waltham, Anglican Congregation of St. Peter at Christ Church	12/13/2015	Gates
Waltham, Christ Church	12/13/2015	Gates
Wareham, Church of the Good Shepherd	10/16/2016	Gates
Wellfleet, St. James the Fisherman Church	7/31/2016	Gates
West Newbury, All Saints' Church	4/24/2016	Gates
Westford, St. Mark's Church	2/7/2016	Gates
Wilmington, St. Elizabeth's Church	3/6/2016	Gates
Winthrop, St. John's Church	2/28/2016	Gates
Woburn, Trinity Church	11/20/2016	Gates
Woods Hole, Church of the Messiah	6/12/2016	Harris, G.
Wrentham, Trinity Church	2/28/2016	Harris, G.

**Episcopal Official Acts
2015 - 2016 Liturgical Year**

Church	Date	Bishop or Rep	Action	
Amesbury, St. James's Church	10/15/2016	Harris, G.	Deanery Confirmation	2C
Andover, Christ Church	4/30/2016	Gates	Deanery Confirmation	2 Confirmed from Phillips Academy at Trinity, Concord
Arlington, St. John's Church	10/15/2016	Gates	Deanery Confirmation	4 Confirmed at Church of Our Redeemer, Lexington
Ayer, St. Andrew's Church	4/30/2016	Gates	Deanery Confirmation	2 Confirmed, 1 Received at Trinity Church, Concord
Barnstable, St. Mary's Church	1/6/2016	Harris, G.	Ordination	Michael Bousquet
Barnstable, St. Mary's Church	6/11/2016	Cederholm	Deanery Confirmation	7 Confirmed, 1 Received at St. Christopher's, Chatham
Bedford, St. Paul's Church	10/15/2016	Gates	Deanery Confirmation	2 Received at Church of Our Redeemer, Lexington
Bedford, St. Paul's Church	6/11/2016	Gates	Deanery Confirmation	5 Confirmed, 1 Received at The Cathedral, Boston
Beverly Farms, St. John's Church	6/11/2016	Gates	Deanery Confirmation	13 Confirmed at The Cathedral, Boston
Beverly Farms, St. John's Church	11/16/2016	Gates	Institution	Stephanie Chase Bradbury
Beverly Farms, St. John's Church	10/22/2016	Cederholm	Deanery Confirmation	1 Confirmed at The Cathedral, Boston
Boston, Cathedral Church of St. Paul	3/26/2016	Harris, G.	Deanery Confirmation	2C; 1R
Boston, Cathedral Church of St. Paul	3/26/2016	Harris, G.	Confirmation	2R
Boston, Christ Church (Old North)	4/30/2016	Harris, G.	Deanery Confirmation	2R
Boston, Church of St. Augustine and St. Martin	4/23/2016	Gates	Institution	Evan Thayer
Boston, Church of the Advent	5/21/2016	Gates	Deanery Confirmation	8 Confirmed at All Saints in Dorchester
Boston, Trinity Church, in the city of Boston	4/30/2016	Harris, G.	Deanery Confirmation	14C; 3R
Burlington, St. Mark's Church	10/15/2016	Gates	Deanery Confirmation	1 Confirmed at Church of Our Redeemer, Lexington
Cambridge, St. James's Church	10/15/2016	Gates	Deanery Confirmation	4 Confirmed at Church of Our Redeemer, Lexington

Church	Date	Bishop or Rep	Action	
Cambridge, St. Peter's Church	10/15/2016	Gates	Deanery Confirmation	2 Confirmed, 1 Reaffirmed at Church of Our Redeemer, Lexington
Charlestown, St. John's Church	6/11/2016	Harris, G.	Deanery Confirmation	4C
Charlestown, St. John's Church	10/22/2016	Gates	Deanery Confirmation	1 Confirmed at The Cathedral in Boston
Chatham, St. Christopher's Church	6/11/2016	Cederholm	Deanery Confirmation	9 Confirmed at St. Christopher's in Chatham
Chelsea, St. Luke's-San Lucas Church	6/11/2016	Gates	Deanery Confirmation	2 Confirmed, 3 Received at The Cathedral, Boston
Chestnut Hill, Church of the Redeemer	5/21/2016	Gates	Deanery Confirmation	13 Confirmed at All Saints in Dorchester
Cohasset, St. Stephen's Church	9/24/2016	Gates	Deanery Confirmation	2 Confirmed at Grace Chapel in Brockton
Cohasset, St. Stephen's Church	6/11/2016	Gates	Deanery Confirmation	5 Confirmed at The Cathedral in Boston
Concord, Trinity Church	10/15/2016	Gates	Deanery Confirmation	7 Confirmed at Church of Our Redeemer, Lexington
Danvers, All Saints Episcopal Church of the North Shore	7/23/2016	Gates	Ordination	David Prentice
Dartmouth, St. Peter's Church	6/11/2016	Harris, G.	Deanery Confirmation	2C; 3R
Dedham, St. Paul's Church	4/5/2016	Gates	Institution	Melanie McCarley
Dedham, St. Paul's Church	5/21/2016	Gates	Deanery Confirmation	8 Confirmed at All Saints in Dorchester
Dedham, St. Paul's Church	10/15/2016	Harris, G.	Deanery Confirmation	3C
Dorchester, Parish of All Saints	5/21/2016	Gates	Deanery Confirmation	2 Confirmed at All Saints in Dorchester
Dorchester, St. Mary's Church	4/30/2016	Harris, G.	Deanery Confirmation	1C
Dover, St. Dunstan's Church	4/30/2016	Gates	Deanery Confirmation	11 Confirmed at Trinity Church in Concord
Dover, St. Dunstan's Church	10/5/2016	Gates	Institution	Sean Leonard
Edgartown, St. Andrew's Church	10/22/2016	Cederholm	Deanery Confirmation	2 Confirmed, 1 Reaffirmed at The Cathedral in Boston
Fall River, St. Luke's Church	6/11/2016	Harris, G.	Deanery Confirmation	4C
Franklin, St. John's Church	4/9/2016	Gates	Deanery Confirmation	1 Confirmed at St. John's Church in Franklin
Groveland, St. James's Church	4/30/2016	Harris, G.	Deanery Confirmation	3C
Hanover, St. Andrew's Church	9/24/2016	Gates	Deanery Confirmation	6 Confirmed at Grace Chapel in Brockton

Church	Date	Bishop or Rep	Action	
Harwich Port, Christ Church	6/11/2016	Cederholm	Deanery Confirmation	1 Confirmed at St. Christophers, Chatham
Hingham, Parish of St. John the Evangelist	6/11/2016	Gates	Deanery Confirmation	13 Confirmed, 3 Received at The Cathedral, Boston
Hingham, Parish of St. John the Evangelist	12/19/2015	Gates	Ordination	Noah Van Niel
Hingham, Parish of St. John the Evangelist	9/24/2016	Gates	Deanery Confirmation	1 Confirmed at Grace Chapel, Brockton
Ipswich, Ascension Memorial Church	9/11/2016	Gates	Confirmation	3 Confirmed, 4 Received during Visitation
Jamaica Plain, St. John's Church	1/14/2016	Gates	Institution	Ted Cole
Lawrence, Grace Church	6/11/2016	Gates	Deanery Confirmation	5 Confirmed and 9 Received at The Cathedral, Boston
Lexington, Church of Our Redeemer	10/15/2016	Gates	Deanery Confirmation	8 Confirmed and 1 Received at Our Redeemer, Lexington
Lincoln, St. Anne's in-the-Fields Church	4/30/2016	Gates	Deanery Confirmation	8 Confirmed at Trinity, Concord
Lynn, St. Stephen's Memorial Church	10/22/2016	Cederholm	Deanery Confirmation	2 Confirmed at The Cathedral, Boston
Lynnfield, St. Paul's Church	10/29/2016	Gates	Deanery Confirmation	7 Confirmed, 1 Received, 1 Reaffirmed at St. Pauls, Malden
Lynnfield, St. Paul's Church	3/1/2016	Gates	Institution	Rob Bacon
Malden, St. Paul's Church	5/1/2016	Gates	Institution	John Clarke
Marblehead, St. Michael's Church	10/22/2016	Cederholm	Deanery Confirmation	2 Received at The Cathedral, Boston
Medfield, Church of the Advent	5/21/2016	Gates	Deanery Confirmation	7 Confirmed at All Saints, Dorchester
Medway, Christ Church	10/15/2016	Harris, G.	Deanery Confirmation	5C
Milton, Church of Our Saviour	10/22/2016	Cederholm	Deanery Confirmation	1 Received at The Cathedral, Boston
Nantucket, St. Paul's Church	6/17/2016	Gates	Institution	John Beach
Needham, Christ Church	10/15/2016	Harris, G.	Deanery Confirmation	6C
New Bedford, St. Andrew's Church	6/11/2016	Harris, G.	Deanery Confirmation	1R
New Bedford, St. Martin's Church	6/11/2016	Harris, G.	Deanery Confirmation	4C; 5 R
Newburyport, St. Paul's Church	4/30/2016	Harris, G.	Deanery Confirmation	6C
Newton, Grace Church	10/15/2016	Harris, G.	Deanery Confirmation	4C
North Andover, St. Paul's Church	4/30/2016	Harris, G.	Deanery Confirmation	6C
Norwood, Grace Church	5/21/2016	Gates	Deanery Confirmation	3 Received at All Saints, Dorchester

Church	Date	Bishop or Rep	Action	
Orleans, Church of the Holy Spirit	6/11/2016	Cederholm	Deanery Confirmation	7 Confirmed at St. Christopher's, Chatham
Plymouth, Christ Church	6/11/2016	Cederholm	Deanery Confirmation	3 Confirmed, 1 Received at St. Christophers, Chatham
Rockland, Trinity Church	6/11/2016	Gates	Deanery Confirmation	4 Confirmed, 1 Received at The Cathedral, Boston
Roxbury, St. Cyprian's Church	4/30/2016	Harris, G.	Deanery Confirmation	7C
Sandwich, St. John's Church	9/29/2016	Gates	Institution	Thomas Ferguson
Saugus, St. John's Church	10/29/2016	Gates	Deanery Confirmation	1 Confirmed at St. Pauls, Malden
Scituate, St. Luke's Church	10/22/2016	Cederholm	Deanery Confirmation	6 Confirmed at The Cathedral, Boston
Sharon, St. John's Church	5/21/2016	Gates	Deanery Confirmation	1 Received at All Saints, Dorchester
Somerset, Church of Our Saviour	6/11/2016	Harris, G.	Deanery Confirmation	13C; 1R
South Yarmouth, St. David's Church	10/26/2016	Gates	Institution	Andrea Taylor
Southborough, St. Mark's Chapel/St. Mark's School	4/24/2016	Hirschfeld	Confirmation	11 Confirmed by Bishop Hirschfeld
Southborough, St. Mark's Church	4/30/2016	Gates	Deanery Confirmation	4 Confirmed at Trinity, Concord
Stoneham, All Saints' Church	4/30/2016	Harris, G.	Deanery Confirmation	4C
Stoneham, All Saints' Church	5/15/2016	Gates	Confirmation	2 Confirmed during Visitation
Stoughton, Trinity Church	6/11/2016	Gates	Deanery Confirmation	2 Confirmed, 4 Received at The Cathedral, Boston
Stoughton, Trinity Church	5/21/2016	Gates	Deanery Confirmation	2 Confirmed at All Saints, Dorchester
Sudbury, St. Elizabeth's Church	3/26/2016	Harris, G.	Confirmation	1C
Swansea, Christ Church	6/22/2016	Gates	Confirmation	3 Confirmed during Institution Service
Swansea, Christ Church	6/22/2016	Gates	Institution	Alan Hesse
Taunton, St. Thomas's Church	4/9/2016	Gates	Deanery Confirmation	3 Confirmed, 1 Received at St. Johns, Franklin
Waban, Parish of the Good Shepherd	10/18/2016	Gates	Institution	James Weldon
Waban, Parish of the Good Shepherd	5/21/2016	Gates	Deanery Confirmation	7 Confirmed at All Saints, Dorchester
Waltham, Christ Church	11/15/2016	Gates	Deanery Confirmation	4 Confirmed, 1 Received at Our Redeemer, Lexington

Church	Date	Bishop or Rep	Action	
Wareham, Church of the Good Shepherd	6/11/2016	Cederholm	Deanery Confirmation	9 Confirmed, 5 Received at St. Christophers, Chatham
Wellesley, St. Andrew's Church	10/15/2016	Harris, G.	Deanery Confirmation	12C
Wellesley, St. Andrew's Church	4/30/2016	Harris, G.	Deanery Confirmation	2R
West Roxbury, Emmanuel Church	5/21/2016	Gates	Deanery Confirmation	2 Confirmed, 1 Received at All Saints, Dorchester
Weston, St. Peter's Church	4/30/2016	Gates	Deanery Confirmation	9 Confirmed at Trinity, Concord
Weston, St. Peter's Church	10/13/2016	Gates	Institution	Lynn Marie Campbell
Westwood, St. John's Church	9/25/2016	Cederholm	Confirmation	6 Confirmed, 9 Received
Whitman, All Saints' Church	9/24/2016	Gates	Deanery Confirmation	1 Received at Grace Chapel, Brockton
Whitman, All Saints' Church	1/7/2016	Gates	Institution	Colette Bachand-Wood
Wilmington, St. Elizabeth's Church	10/22/2016	Cederholm	Deanery Confirmation	4 Confirmed at The Cathedral in Boston
Winchester, Parish of the Epiphany	10/29/2016	Gates	Deanery Confirmation	6 Confirmed at St. Pauls, Malden
Wrentham, Trinity Church	4/9/2016	Gates	Deanery Confirmation	2 Confirmed, 1 Received at St. Johns, Franklin

Licensed Lay Readers and Lay Eucharistic Ministers

Licensed as of Advent I of 2016 Based on Applications received as of May 2, 2017.

WL = Worship Leader; EM = Eucharistic Minister; EV = Eucharistic Visitor

				Goodspeed, Susan	WL		EV
				Goodwin, Brad	WL		
Andover, Christ Church				Greene, Hilary	WL	EM	EV
Bell, Dawn	EM			Greene, Robin	WL	EM	
Blanchard, Elizabeth	EM			Gwynne, Peter	WL	EM	
Tabor, Nancy	EM			Hambly, Joy	WL	EM	
Wagner, Christopher	EM			Hinkle, James	WL	EM	
				Hutton, Peter	WL		
Arlington, St. John's				Jones, Stephen			EM
Foster, Jr., Frank	EM			Knauer, David	WL	EM	
Larson, Mary Jo	EM			Koch, Louise G.	WL	EM	
Manion, Laura	EM			Machnick, Todd	WL		
Seyon, Patrick	EM			Mankiewicz, Margaret	WL		
Ayer, St. Andrew's				Peterson, Linda	WL	EM	
				Phelps, Judson			EM
Barringer, Nancy	EM	EV		Ramage, Patrick	WL		
Barringer, Ned	EM			Rose, Edward	WL		
Bowatt, Ian	EM			Shinn, Joyce			EM
Campbell, Roben	EM			Stanley, Lenore	WL	EM	
Ferrillo, John	EM	EV		Stiefel, Charlotte L.			EM
Geller, Isabel	EM			Tamash, Torrie			EM
King, Andrea	EM			Tempesta, Maureen	WL	EM	
McCawley, Elizabeth	EM			Thorn, Leslyn			EV
Nasworthy, Avery	EM			Thorne, L. Leslyn			EV
Nasworthy, Kayden	EM						
Ott, John	EM			Belmont, All Saints'			
Quarles, Virginia		EV		Duddy, Gloria	WL		
Smith, Carolyn	EM			Lehman, Brad	WL		
Unkel, Douglas	EM	EV		Wong, Glenn	WL		
Barnstable, St. Mary's							
Babcock, Donald	WL			Beverly, St. Peter's			
Booncock, Roger	WL			Bochynski, Margaret		EM	EV
Bresette, Allison	WL			Cabot, John		EM	
Bresette, Matthew	WL	EM		DeLollis, Marian		EM	
Call, Ardith		EM		Farrar, David		EM	EV
Cenzalli, Angela		EM		Lian, Nancy		EM	
Cranitch, James	WL	EM		Monahan, Carrie		EM	
Crocker, Amy		EM		Nelson, Joan		EM	
Duniganatlee-Atlee, Aaron	WL	EM		Newman, John		EM	
Edwards, Betsey	WL			Perrott, Godfrey	WL	EM	EV
Edwards, Richard	WL			Ryan, Donald		EM	
Fales, Nancy	WL	EM		Walker, Deborah			EV
Gadkowski, Linda	WL			Weeks, Ann		EM	
Gadkowski, Walter	WL			Whitney, Linda			EV
Gagnon, Lois	WL			Young, John		EM	
German, Ann	WL						

Beverly Farms, St. John's

Karaman, Joseph	EM	EV	
Malek, Joseph		EV	
Newberry, John	WL	EM	EV
Randolph, Penelope		EV	
Seamans, Eve		EV	
Stone, Walter		EV	
Vouwie, Curtis		EV	
Zaval, Kelly		EV	

Billerica, St. Anne's

Brewster, Kathy		EM	
Callihan, Dorothy		EM	
Desmarais, Ronald	WL	EM	
Dirk, Jeffrey		EM	
Geen, John	WL	EM	EV
Geen, Suzanne		EM	EV
Giroux, Edward		EM	
Giroux, Sandra		EM	
Hopkins, Cyndi		EM	EV
Jones, Elaine		EM	EV
Kennedy, Susan		EM	
Komarinski, Mark		EM	
Kusnierz, John		EM	
Mahoney, Jeffrey		EM	
Massey, Marguerite		EM	
Thibeault, Earl		EM	
Westerlund, Margaret		EM	EV

Boston, Cathedral Church of St. Paul

Butler, Susan		EV
Gary, Loren		EV
Lee, Jane		EV
Seamans, Jeffrey		EV

Boston, Church of the Advent

Blair, Lynda		EM
Boyd, John		EM
Braman, Robert		EM
Brown, C. Thomas		EM
Cleveland, Nathan		EM
Corrieri, Richard V.		EM
della Fera, BSG, Br. Ciaran Anthony		EM
Fox, Melissa C.		EM
Gurnon, Jack		EM
Hardy, Steven		EM
Hosford, Vance		EM
Hunter, Elizabeth		EM
Ieong, David		EM
Lapin, David		EM

Lewis, Jason	EM
Litman, Eric	EM
Madsen, Peter	EM
Manka, Samuel	EM
McDermott, Thomas	EM
McNaughton, Melanie	EM
Pierce, Virginia	EM
Sampson, Stephen J.	EM
Sheffer, Nola P.	EM
Taylor, David	EM
Ture, Julianne E.	EM
Walden, Carolyn	EM

Boston, Christ Church (Old North)

Brooksbank, Bruce	EM	
Gwin, Anne	EM	
Kinsel, Karen	EM	
Stauff, Rosemary	EM	EV
Williams, Katherine	EM	

Boston, Emmanuel Church

Blocher, Mary	EM
Bonney, Jaime	EM
Carlson, Anne E.	EM
Curtis, Paul	EM
DeVries, Barbara	EM
Garborcauskas, Garrett	EM
Griffing, Matthew	EM
Howard, Joy	EM
Kieffer, Susan	EM
Levy-Brightman, Sarabinh	EM
Redmont, Jane	EM

Boston, St. Stephen's

Caines-Francis, Candice	EM
Gray, Maria	EM
Post, Margaret	EM

Boston, Trinity Church

Diver, Joan	EM	EV
Walden, Virginia	EM	EV

Boston (Dorchester), All Saints'

Beckvold, James	EM
Gray, John	EM
Gray, Nicholas	EM
Holmes, Brandon	EM
McLay, Bruce	EM
O'Hara, Geoffrey	EM

Boston (Dorchester), St. Mary's

Clark, Anderson EM
 Coye, Denzel EM
 Lewis, Stacia EM

Boston (Roxbury), St. Cyprian's

Austin, Cheryl EM
 Nelson-Dilday, Judith EM
 Rewolinski, Edward EM
 Richards, Judith EM

Boston (Roxbury), St. John and St. James

Alexis, Ronel WL
 Ambroise, Ralph WL
 Brooks, Norma EM
 Carr, Marva WL
 Danglad, Maureen WL
 Field, Lee EM
 Harris, Scarvel WL
 Johnson, Vilma EM
 King, Betty EM
 Merricks, Daymond WL
 Wallace, Glenn WL
 Wallace, Jordana EM
 Wallace, Patricia WL
 Walters, Cabral WL
 Walters, David E. EM

Boston (W. Roxbury), Emmanuel Church

Bocage-Lemerise, Angela EM EV
 Gooley, John WL EM
 Halliday, Terri WL EM
 Kryczka, Susan WL EM
 Lamb, Virginia WL EM

Braintree, Emmanuel Church

Redmont, Jane EM

Brookline, All Saints'

Brock, Sarah EM
 Calvert, Laurie EM EV
 Cogswell, Carolyn EM
 Daniell, Jim EM
 Ellis, Anne Marie EM EV
 Hogan, Margaret EM EV
 Horner, Elinor Fairchild EM EV
 Keary, Mary Urban EM EV
 Kettell, Henry EM
 McKinney, Jill EM
 Nutt-Powell, Thomas E. EM EV
 Petersen, Harold A. EM
 Randall, Bonnie EM EV

Ross, Jane EM EV
 Schlaeppi, Yvonne EM
 Sewall, Lucy EM EV
 Thibault, Jeff EM
 Yankana, Nadira EM

Brookline, Our Saviour

Clauson, Connie WL EM
 Creecy, Catherine WL EM
 Dalbeck, Betsey WL EM
 Foulsham, Dominic WL EM
 Gestad, Eric WL EM
 Harwood, Tim WL EM
 Healy, Paul WL EM
 Hoyer, Lynn WL EM
 Johnson, Celie WL EM
 Jones, Sally Hull WL EM
 Michmerhuizen, Jim WL EM
 Reeve, Jennifer WL EM
 Reynolds, Alice WL EM
 Robbins, Michael WL EM
 Shaw, Lisa WL EM
 Skillins, Karen WL EM
 Sojack, Judy WL EM
 Stewart, Caleb WL EM
 Tarrant, Richard WL
 Williams, Steve WL EM
 Winslow, Anne WL EM
 Young, Joan WL EM

Brookline, St. Paul's

Baugh, Lorraine EM
 Brue, Andrea EM
 Carter, Kenneth EM
 Choi, Elisabeth EM
 Estes-Smargiassi, Beverly EM
 Fauth, Bo EM
 Ferguson, John EM EV
 Fried, Alan EM
 Hobbs Miracky, Tammy EM
 House, Roger EM
 Jacobson, Edward EM EV
 Johnson, Hazel EM
 Kurkjian, Maryann EM EV
 Luk, Wendy EM
 Lukason, Lauren EM
 Madden, Nancy EM
 March, Amanda EM EV
 Marth, Eliza EM
 Motimele, Matshai EM
 Munzer, Betsy EM

Powers, Edmund EM
 Rugen, Leah EM EV
 Sanches, Linda EM
 Smith, Georgia EM
 Stines, Suzette EM
 Taylor, Madeleine EM
 Thiemann, Sarah EM EV
 Wing, Sharlene EM
 Xie, Adelaide Oneal EM

Buzzards Bay, St. Peter's

Benting, Linda EM
 Bilancieri, JoAnne EM
 Cain, Barbara EM EV
 Letzeisen, Kathy EM
 Lihzis, Kenneth EM
 Taylor, Mark EM
 Willmott, Tim EM

Cambridge, St. James'

Agard Lynch, Laverne EM
 Caulfield, Mary WL EM EV
 Hamilton, Olivia WL EM
 Hayes, Nicholas WL EM
 Hirschi, Jane WL EM
 Hixson, John EM
 King, Marian WL EM
 Martinez, Isaac WL EM
 Maynard, Eric WL EM
 Moore-Pollard, Mabel EM
 Shumway, Anne WL EM EV
 Verdieu, Yvette WL EM EV
 Weston, Sylvia WL EM EV
 Yoder, Mark EM
 Zook, Lauren WL EM

Cambridge, St. Peter's

Davis, Rupert EM
 Denniston, Elaine EV
 Duryee, Cynthia EV
 Edmondson, Becky WL EM
 Lindo, Alvin EM
 Lucas, Joy EV
 McMullen, Gillian EM EV
 Scantlebury, Addison EM
 Scantlebury, Rashard EM
 Smith, Frank EM
 Soones, Henry EM
 Van Es, Katy WL
 Walsh, Beth WL
 Williams, Cheryl Lyn EM EV

Wyon, Rachel WL

Cohasset, St. Stephen's

Cook, Martha EV
 Eisenhower, Caroline EV

Concord, Trinity Church

Anderson, John EM EV
 Atherton, Charles EM EV
 Barron, Tracy EM EV
 Birge, Walter W. WL EM EV
 Burroughs, Carol EM EV
 Ciancio, Suzette EM EV
 Clements, Jeffrey WL EM EV
 Daniel, Lee EM EV
 Lattimore, Gresh WL EM EV
 Lewis, John EM EV
 Moss, Emily EM EV
 Newbold, Jennifer EM EV
 Steward, Ernest WL EM EV
 Stoessel, Deborah EM EV
 Thorpe, Margaret EM EV
 Tilton, Jace EM
 Turnquist, Jan EM EV
 Vockel, Virginia EM EV

Danvers, All Saints/North Shore

Bianchi, Erika WL EM
 Briggs, Janice WL
 Cloutman, Shirley WL
 Coleman, Barbara WL EM
 Coulson, Ginna WL EM
 DeCarlen-Bumiller, Michael WL
 Drivas, John WL EM
 Gamble, Sally WL
 Gettings, John WL
 Gordon, Jim WL
 Gordon, Mary WL
 Hooper, William WL
 Lemieux, Kat WL
 Lord, Erik WL
 Lord, Vicki WL
 Losa, Elizabeth WL
 Maitland, Ronda WL EM
 Monagle, Linda WL
 Muriithi, Jeremiah WL
 Neal, Jennifer WL
 O'Brien, Diana WL
 Olendzenski, Leah EM
 Palmer, Lisa EM
 Pelletier, Virginia WL

Spencer, Susan WL
 Symmes, Bruce EM
 Witham, Henry EM

Dedham, St. Paul's

Barbercheck, Joseph WL EM
 Burt, Kenneth WL EM
 Harper-Nixon, Matt WL EM
 Lamb, Magrit WL EM
 MacKenzie, Ian WL EM
 Michelson, Peter WL EM
 Palmer, Thomas WL EM
 Parkman, Ted WL EM
 Pearrow, Mark WL EM
 Prentice, Julia WL EM
 Wood, Lisa WL EM
 Woodard, William WL EM EV

Easton (North), Bristol Trinity Episcopal

Barber, Laura EM
 Berry, Wendy EM
 Cole, Norma EM EV
 Hinds-Manick, Charlotte EM EV
 Rys, Claudia EV
 Savage, Sharon WL EM
 Shearstone, Cynthia WL EM EV
 Silverman, Patricia WL EM EV
 Tyler, Lynda WL EM EV

Edgartown, St. Andrew's

Anastacio, Paul WL EM
 Dietz, Bonnie WL EM
 Fenn, Marcia EM
 Kelly, Susan WL EM EV
 Scarpone, Michelle WL EM
 Slayton, Heather Anne EV
 Taylor, Jo-Ann WL EM EV
 Weibel, Susan WL EM
 White, Christine WL EM EV
 Wilson, Adam WL EM

Everett, Grace Church

Ajak, Ajah Ajak EM
 Akon, Athiang Lual EM
 Ambroise, Ralph WL
 Arop, Teresa WL EM
 Awan, Panther WL
 Ayiik, James Garang WL
 Ayuen, John Deng WL
 Bessler, Louise WL EM EV
 Bol, Mangok Mach WL

Bothroyd, Alice Claire WL EM EV
 Colas, Manio WL
 Dulorier, Cassandea WL
 Faison, Margaret WL EM
 Gai, Akon Bair WL
 Galvin, Janis WL EM EV
 Guot, Abiar Makor EM
 Isaacs, Marsha WL EM EV
 Leek, Akuot Deng WL
 Maluil, William Manyok WL
 Manyok, David Mayen WL
 Moister, Lucille EM
 Newton, Taylor WL EM
 Preston, Robin WL EM
 Ruot, Mary Amou EM
 Sneed, Beverly Faison WL EM
 Yaak, Atem Aruei EM

Foxboro, St. Mark's

Decker, Robert WL EM
 Dent, Patricia WL EM EV
 D'Onofrio, Louise WL EM
 Dunnington, Cheryl WL EM
 Erler, Rose WL EM
 Esmond, Sandra WL EM
 Evans, Susan WL EM
 Everson, Phyllis WL EM
 Goodwin, John WL EM EV
 Hartwell, Judith WL EM
 Penza, Patricia WL EM
 Pineault, Janet WL EM
 Schneider, Chris WL EM
 Van Dell, John WL EM

Framingham, St. Andrew's

Gay, Joan EV

Franklin, St. John's

Bishop, Patti WL EM
 DiGiacamo, Steve WL EM EV
 Enright, Amy WL EM
 Farrell, Jane M. WL EM EV
 Griffith, Abigail WL
 Griffith, Aidan WL
 Lobo, Sarah WL
 Lutz, Scott WL
 Prear, Nicholas WL EM
 Prear, Sonya WL EM
 Sher, Amanda WL EM
 Sinnery, Donna WL EM
 Wrona, Joanna WL

Groveland, St. James'

Anderson, Starr K.	WL	EM	
Boyd, Jan	WL	EM	
Harrison, James	WL	EM	
Moorman, Regina		EM	EV
Parker, Charlotte L.	WL	EM	EV
Prescott, Mark		EM	
Robinson, Cheryl		EM	
Sanborn, Wayne		EM	
Schacht, Rosemary		EM	
Steer, Julia	WL	EM	

Hamilton & Wenham, Christ Church

Aiken, Beckie		EM	
Arthur, David		EM	EV
Arthur, Katherine		EM	EV
Bergquist, David		EM	EV
Breed, Jamie		EM	
Bukkegyi, Dan		EM	
Carson-Lier, Andrew		EM	
Carson-Lier, Sarah		EM	
Chmura, Greg		EM	
DeWeese-Boyd, Margie		EM	
Dunning, Annalisa		EM	
Dunning, George		EM	
Friedrich, Sandy		EM	
Herndon, Pam		EM	
Hodge, Jackie		EM	
Kinney, Donna		EM	
MacQuarrie, Josh		EM	
Maleno, Nancy		EM	
McDonnell, Ryan		EM	
McKernan, Chris		EM	
Merrill, Joe		EM	
Messier, Graham		EM	
Parson, Steve		EM	
Peabody, Lindsey		EM	
Preston, Robert		EM	
Reif, Cheryl		EM	
Reynolds, Jim		EM	
Reynolds, Kali		EM	
Spong, John		EM	EV
Stockwell, Mark		EM	
Sykes, Abby		EM	
Sykes, Joshua		EM	
Wilson, Kenneth		EM	
Wilson, Laurie		EM	

Hanover, St. Andrew's

Julien, Carol		EM	
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Kelbaugh, Sarah		EM	
Leslie, Karyn		EM	
Leslie, Susannah		EM	
Mirisola, James		EM	
Nickerson, Dave		EM	
Rogers, Joan		EM	
Troupe, Karen A.	WL	EM	EV
White, James		EM	
Wood, JoEllen		EM	

Harwich Port, Christ Church

Aylesworth, Deborah	WL	EM	EV
Butler, Karen	WL	EM	
Decker, Elizabeth	WL	EM	
Lawton, Robert C.	WL	EM	
Lewis, Porter	WL	EM	EV
Romer, Jane	WL	EM	

Haverhill, Trinity Church

Cerrato, Chris	WL	EM	
Clark, Doris		EM	
Estey, Cathy	WL	EM	EV
Fowler, Gary		EM	
Jacobs, Bette	WL	EM	EV
King, Andrea		EM	
King, Janet	WL	EM	EV
Moulton, Michelle		EM	
Truill, Frank		EM	
Twombly, Kristine		EM	

Hingham, St. John the Evangelist

Bradford, Zoe		EM	
Burnett, Peter		EM	
Chace, Cynthia		EM	
Clinton, David	WL	EM	
Daley, Amanda		EM	
Daley, Jeannette		EM	
Daley, Thomas	WL	EM	
Fredie, Deanna		EM	
Galko, Grace		EM	
Goodhue, Henry		EM	
Hancock, Lucy		EM	
Hatfield, Steve		EM	
Hutchinson, Emily		EM	
Kidder, Phyllis		EM	EV
Lauter, Irma		EM	
Lauter, Talbert		EM	
Linscott, Heather		EM	
Long, Elizabeth		EM	
Magner, Danielle	WL	EM	
McIsaac, Vivian		EM	

Overbeck, Anne	EM			Bowlby, Cassie	EM	EV
Rossano, Jamie	EM			Burns, Cathy	EM	
Strehle, Margaret	EM			Burns, Steve	EM	
Torey, Cathy	EM			Burnside, Jamie	EM	
Turbak, Sue	EM			Burnside, MaryAnne	EM	
Holbrook, St. John's						
Brown, Linda	EM	EV		Chase, Lee Noel	EM	
Jean-Philippe, Merlande	EM	EV		Conrad, Lance	EM	
Kasica, Jeffrey	EM	EV		Conrad, Sarah	EM	
Rowe, Stephen	EM	EV		Coons, Charlie	EM	
Semeter, Karla		EV		Coons, Elizabeth	EM	
Sullivan, John	EM	EV		Emanuel, Susan	EM	EV
Sullivan, Susan	EM	EV		Faber, Andrea	EM	
Webb, Marilyn	EM	EV		Fortier, Bill	EM	
Wilbur, Eleanor	EM	EV		Fox, Ian	WL	EM
Holliston, St. Michael's						
Ahronian, Brian	EM			Frances, Julia	WL	EM
Ballenger, Grace	EM			Haussein, Evelyn	WL	EM
Clark, Joan	EM	EV		Haussein, Tommy	EM	
Daly, Helen	EM			Kalf, Alan	EM	
Daugherty-Dixon, Pete	EM			Kalf, Cara	EM	
Frye, Dana	WL	EM		Kern, Frank	EM	
Giarla, Bob	EM			Kern, Janet	EM	
Girard, Karen	EM			King, Bob	WL	EM
Hodgman, Leslee	EM			King, Mary Etta	EM	
Koshy, Tom	EM			Koso, Peter	EM	
Malone, Nancy	WL	EM	EV	Kukolich, Linda	EM	EV
May, Kathy	EM			Mirani, Kathleen	EM	
May, Lyntessa	EM			Mockett, Kathy	EM	
McIntyre, Jane	WL	EM		Murnaghan, Beth	EM	
Thorner, Ben	EM			Murnaghan, George	EM	
Weston, Pat	EM	EV		Murnaghan, Mary Ucci	EM	
Hopkinton, St. Paul's						
Desilets, Jane	EM			Needham, Chris	EM	EV
Donahue, Roxanne Vogal	WL	EM		Needham, Janet	EM	EV
McGrath, John B.	EM	EV		Nokes, Mary	EM	EV
Pries, Debra Swing	WL	EM		Lowell, St. Anne's		
Watt-aqir, Julie	WL	EM		Quintero, Dolores		EV
Hudson, St. Luke's						
Carnes, William	EM			Lynnfield, St. Paul's		
Cochrane, Danielle	WL	EM	EV	Bourden, Holly	EM	
Hores, Michael	EM			Garlow, Gretchen	EM	
King, Logan	EM	EV		March, Priscilla	EM	
Miller, June	WL	EM	EV	Ogren, Carol	EM	EV
Orcheski, Gail		EV		Rosato, Jim	EM	EV
Lexington, Our Redeemer						
				Savage, Barbara	EM	
				Shea, Carolyn	EM	
				Vath, Jennifer	EM	EV
				Vath, Jim	EM	
				Marblehead, St. Andrew's		
				Cassidy, Marsha	EM	
				Cooney, Shawn	EM	

Davis, Cynthia	EM
Fowler, Alison	EM
Hornos, Marcela	EM
Howard, Peg Voss	EM
Isbrandtsen, Diana	EM
Ives, Charles	EM
Johns, Edith Bross	EM
Mansfield, Jason	EM
Nyren, Chuck	EM
Phillips, Peter	EM
Pied, Georgette	EM
Ramsden, Nancy	EM
Rowe, Sterling	EM
Shields, Alexandra Pineros	EM
Silvius, Charles	EM
Snell, Joy	EM
Stratton, Penny	EM
Swanson, Kate	EM
Tener, Elizabeth	EM

Marblehead, St. Michael's

Armini, Jenny	EM
Barnett, Jeffrey	EM
Barr, Katharine	EM
Bates, Sarah	EM
Butterworth, Susan	EM EV
Clay, Stephan	EM
Doyle, Patrick	EM
Fizer, Brian	EM
Haug, Walter	EM
Nicolas, Annette	EM EV
Shea, Denise	EM
Spaberg, Patricia	EM
Wild, Victor	EM

Marion, St. Gabriel's

Conway, Merry	WL
Cowell, Cathy	EV
Dubois, Josephine A	WL EM
Easterly, Harry	WL EM
Ford, Guppy	WL EM
Havel, Peter	WL EM
Helm, Bette	WL
Henderson, Ron	WL EM
Hotte, Kate	WL
Hotte, Russell	WL EM
Jeffrey, Andrew	WL EM
Jeffrey, Mary	WL EM
Jennings, Julia	WL
Kennedy, Priscilla	WL EM
Kennedy, William	WL EM

Kleven, Judith	WL
Lamson, Judy	WL EM
Leatham, Douglas	EM
Leatham, Elizabeth	EM
Lonsdale, Jane H.	WL EM EV
Manning, Karen	WL EM
McManus, Barbara	WL
McManus, Gil	WL
Meyer, Chris	EM
Mock, George	WL
Poyant, Richard	WL EM
Poyant, Susan	WL
Race, Julie	WL
Roberts, Cathy	WL
Sanderson, Barbi	WL EV
Sanderson, Bob	WL EV
Titus, David	WL
Titus, Suzy	WL
Von Jess, Laura	WL
Walden, Asher	EV
Webb, Anne	WL
Webb, Dick	WL

Marshfield, Trinity Church

Belmosto, Holly	EM
Christman, Barbara	EV
Conner, David	EM
Davidson, Timothy	EV
Dempsey, Robert	EM
Farrell, Margaret	EM
Fecteau, Bryan	EM
Frugoli, Donna	EV
Frye, Marge	EV
Hahn, William	EM
Howard, Marlene	EV
Kwiatkowski, Kim	EM
Meador, Tess	EV
Melvin, Jane	EM
Pereira, Jane	EM
Stewart, Virginia	WL EM EV
Uhler, Allen	EM

Medfield, Church of the Advent

Baker, Donna	WL
Hill, Geoffrey	EM
Melzar, Theresa	WL EM
Moon, Jill	WL EM
O'Neil, Logan	EM
Scanlon, Ingrid	WL EM

Medford, Grace Church

Benjamin, Maria	EM	EV	Phillips, Suzette	EM	EV
Brawley, Nathan	EM		Stagliola, Laura	EM	
Brownsmith, Esther	EM		Wainwright, Betty	EM	EV
Carson, Louis	EM		Young, Jeremy	EM	
Foote, Jr., Wes	WL	EM EV			
Hale, Dennis	EM		Milton, Our Saviour		
Johnson, Genita	EM		Cintron, Luis	WL	EM
Joseph, Rochnet	EM		Crane, Serena		EM
Karpowich, Judith		EV	Crane, Terrilee		EM
Muir, Mary		EV	D'Souza, Diane		EM
Opara, Agnes	EM		Eder, Frederika		EM
Pearson, Brenda	EM	EV	Eder, Michael		EM
Pietrantonio, June	EM		Fuller, Devereux		EM
Ramirez, Warren	EM	EV	Fuller, Rebecca		EM
Rogers, Jr., John		EV	Grace-Moran, Karen		EM
Scott, Lucinda	EM		Grant, Patricia		EM
Sheets, Robin		EV	Humphreys, David		EM
Smist, Margaret	EM	EV	Humphreys, Jackson		EM
Smith-King, Branwen	EM		Humphreys, Lori		EM
Woodward, Katherine	EM	EV	Hunt, Ann		EM
			Lienf, Heidi		EM
Medway, Christ Church			McKenzie, Elizabeth	WL	EM
McCarthy, Jessica	EM		McLaughlin, John	WL	EM
Wahl, Denise	EM		Ozelius, Laurie		EM
Willisson, Pace	EM		Socci, Robert		EM
			Taber, Rene		EM
Melrose, Trinity Church			Tello, Monique		EM
Bremberg, Charlene	EM	EV	Valencius, Conevery		EM
Fitzgerald, Barbara	EM	EV	Valencius, Zora		EM
Gauch, Sherron	EM		Williams, Carl		EM
Keefe, Florence	WL	EM EV	Williams, Jacquelin		EM
Kelley, Louise	EM		Williams, James		EM
Kukura, Philip	WL	EM	Zilla-Ba, Kate		EM
Retalic, Marie	EM	EV			
Sherman, Gail	EM		Nantucket, St. Paul's		
Thompson, Michael	WL	EM	Barnes, Curtis	WL	EM EV
			Bent, Rebecca		EM
Methuen, St. Andrew's			Borneman, Cynthia		EM
Beagan, James	WL	EM	Borneman, Paul		EM
Brown, Beverly	WL	EM EV	Broughman, Alison		EM
McKeon, Matthew	WL	EM	Broughman, Richard		EM
McLeod, Krista	WL	EM	Casey, Mary	WL	EM EV
Walta, Laura	WL	EM	Esteban, Fernando	WL	EM EV
			Frable, Godfrey		EM
Middleboro, Our Saviour			Fronzuto, Suzanne		EM EV
Brown, Thomas		EM	Goss, Nigel		EM
Costa, Frances	WL	EM EV	Hall, Beverly	WL	EM EV
Costa, John	WL	EM EV	Jones, Sara		EM EV
Galvin, Matt		EM	Knox-Johnston, Sandra		EM
Goodrum, Ann Davis	WL	EM EV	MacNab, Malcolm		EM
Holdsworth, Chelsea		EM	Maltby, Victoria		EM

Manske, Ethan		EM		Towers, Kathleen		EM	
Morley, Helen		EM		Vincent, James		EM	
Perleman, Sheri		EM		Webbe, Sydney		EM	
Robertson, Ian		EM		Wilbour, William		EM	
Walker, William		EM					
Whelden, Elizabeth		EM		Newburyport, St. Paul's			
Wight, Randall		EM	EV	Aldrich, Ann		EM	
Natick, St. Paul's				Bishop, Carole		EM	
Gaines, Valerie		EM	EV	Brennan, Beverly		EM	
Willsey, Mylinda		EM		Cejka, Joyce		EM	
				de Stadler, Bronson		EM	
New Bedford, Grace Church				Hussey, Thomas		EM	
Baker, Benjamin	WL	EM		Jones, Pam		EM	
Barnaby, Olivia		EM		Jukins, Nancy		EM	
Barnum, Danielle		EM		Keller, Robert		EM	
Bedard, Douglas		EM		Patton, Dawn		EM	
Blais, Alexia		EM		Peck, Doug		EM	
Bortelho, Courtney		EM		Smith, Rosamond		EM	
Bortelho, Melissa		EM		Terry, Martha		EM	
Boyce, Margaret		EM		Walton, Shirley		EM	
Boyce, Margaret		EM		Newton, Grace Church			
Boyce, William		EM		Savage-King, Ruthann			EV
Buckles, Patricia			EV				
Choquette, Leo		EM	EV	Newton (Auburndale), Parish of the Messiah			
Clarke, Jean		EM	EV	Bancroft, Martha		EM	
Croteau, Gerald	WL	EM		Copeland, Carol L.	WL	EM	EV
Decker, Allen	WL	EM		Jones, Bernie	WL	EM	EV
Doe, Michael		EM		Nelson, David	WL	EM	
Douhan, Zelinda			EV	Young, Frederick	WL	EM	
Howcroft, John	WL	EM		Newton Centre, Trinity Church			
Jaikes, Daniel		EM		Bancroft, Martha	WL	EM	
Kelly, Louise			EV	Baynham, Thomas		EM	
Knox, Judith			EV	Brock, Susan	WL		
Laskey, Victoria		EM	EV	Carter, Nick		EM	
Luth, Abbey		EM		Copeland, Carol			EV
Luth, Autumn		EM		Coull, Tim	WL		
Montague, Damien		EM		English, Donna			EV
Monteiro, David		EM		Goldsmith, Mike	WL	EM	
Monteiro, Leslie		EM		Hilliard, Karen		EM	
Morck, Claire		EM		Jones, Bernie			EV
Morgan, Mia		EM		Kohlmeier, Nathan	WL	EM	
Reed, William		EM		MacNair, David	WL	EM	
Roderiques, Pauline		EM	EV	Miller, Kevin	WL		
Ryder, Charlene	WL	EM	EV	Miradey, Tommy Hobbs	WL	EM	
Spoor, David		EM		Young, Fred		EM	
St. Julien, Ashley		EM		Norwood, Grace Church			
Steliga, Heather		EM		Bedard, Jacqueline	WL	EM	
Swain, Joan			EV	Bravo, Manuel	WL	EM	
Sylvia, Brenda		EM	EV				
Sylvia, Elizabeth		EM					

Gosselin, Edmond	WL		Hester, Elizabeth	EM	EV
Jarrell, Susan	WL		Lawrence, Donna	EM	EV
Loescher, Peter	WL	EM	Lee, Fang Chi	EM	
Maloof, Carol	WL	EM	Melahoures, Constance	WL	EM EV
Matthews, Brent	WL	EM	Metcalfe, Jeffrey	EM	
Noble, Catherine L.		EM EV	Metzger, Rebecca	EM	
Regner, Michael		EM	Nielsen, Robin	EM	EV
Wharton, Katherine	WL		Palombo, Priscilla		EV
Wilson, Elizabeth	WL	EM	Perry, Roberta		EV
			Stanne, James	EM	EV
Orleans, Holy Spirit			Strohschneider, Amy	EM	
Armstrong, Martha		EV	Sykes, Cynthia	WL	EM EV
Beebe, Emily		EV	Tang, Hsin Ju	EM	
Bragdon, Don		EV	Trenouth, Peter	WL	EM EV
Bragdon, Katherine		EV	Woodruff, Louise	WL	EM
Calhoun, Celia	EM		Zinger, Martha	EM	
Cole, Ike		EV			
Delano, Douglas	EM		Provincetown, St. Mary's		
Fry, Sara	EM	EV	Avellar, Mary Jo	EM	
Gentile, Jack	EM	EV	Boudreau, Joan	EM	
Gentile, Karen	EM	EV	Chapman, Lisbeth	EM	
Goddard, Nat	EM		Ellsworth, Harry	EM	
Hutchens, Bernie	EM		Graham, Peter	EM	
Jones	EM		Jackett, Priscilla	WL	EM
Linton, Lori	EM	EV	Marshall, Alexander	EM	
Marshall, Sandra	EM	EV	Matarazzi, Rebecca	EM	
Mason, Edward	EM	EV	McChensey, Priscilla	EM	
Merritt, Elizabeth		EV	Walker, Robert	EM	
Mines, Jody		EV	Weinress, Mark	EM	
Nixon, Jane		EV			
Nixon, John	EM		Quincy, St. Chrysostom's		
O'Hara, Richard	EM	EV	Beatty, Stephen	WL	EM
Paradise, Kate	EM	EV	Bocklus-Suwyn, Annie	EM	
Ridgeway, Brian		EV	Bowers, Kellie	EM	
Sasso, Jack	EM		Clevenger, Dan	WL	
Sasso, Susan	EM		Good, Barbara	EM	
Smith, Dilys Jones	EM	EV	Goossens, Eric	EM	
Wieboldt, Cynthia	EM	EV	Hersey, Cliff	WL	EM
			Hutchinson, Harriet	EM	
Plymouth, Christ Church			Keith, Judy	EM	
Bradley, Judith	EM		Lynch, Pat	EM	
Bradley, Robert	EM		Marshall, Elizabeth	WL	EM
Burgess, Sandra	EM	EV	McCloy, Bethany	EM	
Carroll, William	EM		McConnell, Eleanor	EM	
Courtney, Sr. Brigid	EM		McIntosh, Ahanni	EM	
Eby, Donna	EM	EV	Parise, Karla	EM	
Eby, Donna	EM	EV	Parker, Carrie	EM	
Fredrickson, Johnna	EM		Piel, Carrie	EM	
Galvam, Amy	EM		Snow, Carsten	EM	
Garrone, Linda	EM		Springer, Marguerite	EM	
Haven, Nancy	EM		Stuver, Christy	EM	

Randolph, Trinity Church

Butz, Andrew	EM		
Gillis, Sandra	EM		
Hennessey, Diane	EM		
Heywood, Pauline	EM	EV	
Kershaw, Richard	WL	EM	
Lutz, Donald	EM	EV	
Obukwelu, Gladys	EM		

Reading, Good Shepherd

McDormand, Kathleen	EM		
Strack, Jessica	EM		

Rockland, Trinity Church

Crockett, Daniel	WL	EM	
Dunn, Marion	WL	EM	
Morse, Charles	WL	EM	
Morse, Charles	WL	EM	
Ofuokwu, Emmanuel	WL	EM	EV
Ofuokwu, Margaret		EM	EV
O'Neill, Judith	WL	EM	
O'Neill, Thomas	WL	EM	
Sevier-Harvey, Trudy		EM	EV
Whiting, George	WL	EM	

Salem, Grace Church

Allen, Stephen	WL		
Boisvert, Tony	WL		
Busteed, Anne	WL		
Clark, Rebekah	WL		
Cole, Gerry		EM	
Crawford, Ethel	WL	EM	
Hawkes, Babs	WL	EM	
Lederhaus, Juli	WL	EM	
Lederhaus, Walter		EM	
Lemons, Priscilla	WL	EM	
MacKay, Hugh	WL		
McHugh, Maureen		EM	
Moar, Joanne	WL	EM	
Nalipinski, Paige	WL	EM	
O'Ryan, David	WL	EM	
Papps, Deborah	WL	EM	EV
Papps, Jon	WL	EM	EV
Rhodes, Judy		EM	
Small, Patricia	WL	EM	EV
Stonehouse, Jason	WL	EM	
Thompson, Jane		EM	
Valatka, Jacqueline	WL		
Wagner, Eric	WL		
Watson-Felt, Helen	WL	EM	

Salem, St. Peter's/San Pedro

Akin, Bruce	WL		EV
Alexander-Hurley, Barbara		EM	
Amenu-Kpodo, Aku		EM	
Barber, Debbie		EM	
Bojos, Andres Martin		EM	
Brown, Nancy		EM	
Calnen, Diane			EV
Galeano, Alejandro		EM	
Hill, Ruby		EM	
LaVoie, Jinny	WL	EM	EV
McHugh, Robert		EM	
Milman, Heidi		EM	
Reichert, Christine		EM	
Robinson, Bruce	WL	EM	EV
Simoneau, Bob		EM	EV
Sweet, Jim	WL	EM	

Sandwich, St. John's

Austin, Linda P.		EM	
Cohen, Jared		EM	
Correia, Wendela			EV
Greene, Janet		EM	
Hale, Laurence		EM	
Heinlen, Emma		EM	
Miller, Anne			EV
Rideouty, Clifton		EM	
Roche, Anne Geary			EV
Thomas, James		EM	

Saugus, St. John's

Aston, Julia	WL	EM	
Belyea, Stephen	WL	EM	
Felci, Paul	WL	EM	
Goodwin, Gary	WL	EM	
Graves, Linda	WL	EM	
Littlehale, Elizabeth	WL	EM	
Phelps, Jean	WL	EM	
St. Clair, Sandy	WL	EM	

Shirley, Trinity Chapel

Doran, Lyn		EM	
McKenna, Bill	WL		
Spall, James	WL		
Yancy, Janice	WL		

Somerset, Our Saviour

Carpenter, Rose			EV
MacLagan, Mark			EV

Somerville, St. James'

Baxter, Paul	WL	EM	EV
Freeman, Moriah	WL	EM	EV
Kimball, Charles	WL	EM	
Olson, David		EM	
Spencer, Sarah Faith	WL	EM	EV

Stoneham, All Saints'

Alarcon, Michael		EM	
Beaudin, Fred		EM	
Collins, Allain	WL		
Conlon, Jeffrey		EM	
Conlon, Sandra	WL		
Dapkiewicz, Steve		EM	
Dickey, Kelly	WL	EM	
Ditullio, Jeff	WL		
Mandosa-Gori, Danielle		EM	
McIver, Elizabeth	WL		
Muir, Mary			EV
Pepi, Vivien	WL		
Webber, Robert	WL		

Stoughton, Trinity Church

Amadi, Ebe	WL	EM	
Bunker, Robert	WL	EM	EV
Cole, Mary	WL	EM	
Dawkins, Adam	WL	EM	
Martin, Nancy	WL	EM	
Mullen, Debra	WL	EM	EV
Newton, Norma	WL	EM	EV
Spiegel, Lloyd		EM	
Walls, Martha	WL	EM	EV

Sudbury, St. Elizabeth's

Brackett, John		EM	
Card, Cliff		EM	
Chape, Libby		EM	
Chape, Matt		EM	
Darias, Janice		EM	
Fisher, Jake		EM	
Griesel, Ruth		EM	EV
Hamilton, Stuart		EM	
Howard, John		EM	
Howard, Tim		EM	
Kenney, Ryan		EM	
Kimble, Sara		EM	
Knave, Dan		EM	
Newton, Jim		EM	
Perry, Clare		EM	
Peters, Jim		EM	EV

Springsteel, Jan			EM
Stewart, Larry			EM
Varner, Kiersten			EM
Wallingford, Betsy			EM
Watson, Rick			EM
White, Kelley			EM

Swampscott, Holy Name

Chadwell, Brian			EM
Clausen, Marilyn			EM
Evans, Hugh			EM
Evans, Lynne	WL		EM
Flannery, Bill			EM
Gifford, Estelle			EM
Hanson, Patty			EM
Hutchinson, Althea			EM
Kieser, Kathlyn			EM
Rausted, Cheryl			EM
Smith, Huntley			EM
Smith, Robert Tucker			EM
Torrey, Robert	WL	EM	EV

Swansea, Christ Church

Mulrooney, Judith			EV
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Taunton, St. Thomas'

Belenger, Linda			EM	
Blake, John			EM	
Hodge, Sonia	WL	EM	EV	
Kimball, Beverly			EM	
Largey, Marge			EM	
LaRue, Terry			EM	
Leary, Avis			EM	
McNamee, Alex			EM	
Miller, Robin			EM	EV
Neugeboren, Brenda			EM	
Perkins, Wayne			EM	
Shearer, Monica			EM	
Stagliola, Michael			EM	
Teed, Norman			EM	
Vitale, Renee			EM	
Walker, Len			EM	
Walker, Sarah			EM	
Wargat, Mary			EM	EV

Topsfield, Trinity Church

Aldridge, Denise			EM	EV
Kneedler, Pavica			EM	EV
Lightfoot, William			EM	
Lunn, Joan			EM	EV
Magner, Georgie			EM	

McKay, Pam		EM		Pecora, Veronica		EM	
Pembroke, Kyle		EM		Wolfendale, David		EM	
Shannon, Debra L.		EM					
Shannon, William N.	WL	EM	EV	Weymouth (South), Holy Nativity			
Snyder, Joseph S.		EM	EV	Asher, Terry	WL	EM	
Wisniewski, Ed		EM		Blakely-Smith, Bruce	WL	EM	
				Blakely-Smith, Diana	WL	EM	
Wareham, Good Shepherd				Crosby, Nancy	WL	EM	
Alfonso, Natecia		EM		Ingalls, Alex		EM	
Burgess, Philip		EM		Leamy, Judy	WL	EM	
Ellis, Judy		EM		Lucier, Donna	WL	EM	
Ellis, Richard		EM		Mermet, Nancy	WL	EM	
Facchetti, Sheryl		EM		Morgan, Kyle	WL	EM	
Foley, Heidi		EM		Morris, Casey		EM	
Funnell, Millie		EM		Muller, Edwin	WL	EM	
Nyman, Jean		EM		Munise, Nancy	WL	EM	
Parkonen, Maurice		EM		Williams, Stephen	WL	EM	
Pechey, Erica		EM		Williams, Terry	WL	EM	
Perron, Leslie		EM					
Rose, Deborah		EM		Whitman, All Saints'			
Walsh, Karen		EM		Baker, Emily		EM	
Williams, Sandra		EM		Baker, Steve		EM	
Winters, Dale		EM		Eunice, Patricia		EM	
				Gurney, Regina		EM	
Watertown, Good Shepherd				Pye, Ann		EM	
Ahern, Patricia	WL			Tingblad, Richard		EM	
Brown, Susan		EM	EV	Wick, Herb		EM	
Byrd, Karen			EV	Wight, David		EM	
Daw, May	WL			Wohlers, Chad		EM	
Donna, James	WL						
Gyllensvard, Kate		EM		Wilmington, St. Elizabeth's			
Hilton, Duncan	WL	EM		Bagayao, Richard	WL	EM	
Lampert, Sandra		EM	EV	Cosman, Sarah	WL	EM	
Steadman, Stephen	WL	EM	EV	Cranford, Cheryl	WL		
West, Kelly		EM	EV	Curtis, Susan	WL		
				DeLucia, Patti		EM	
Wellesley, St. Andrew's				Fardy, Lydia	WL		
Staelin, Ellen			EV	Hogan, Janice		EM	
				Hull, Jeff	WL	EM	
Westford, St. Mark's				Kilburn, Tom	WL		
Carlson, Jacqueline	WL	EM		Pratti, Janice	WL	EM	
Culver, Martha		EM		Sinclair, Melanie	WL		
Donohue, Ellen		EM	EV	Stratouly, Cindy	WL		
Duran, Susan		EM		Thompson, Robin	WL	EM	
Elliott, Herbert	WL	EM	EV				
Ellis, Thomas		EM		Winchester, Epiphany			
Fletcher, Frances			EV	Becker, Susan			EV
Hilton, Judie		EM		Cass, Joy		EM	EV
Kintner, Eric		EM		Cass, Leo			EV
Larson, Linda			EV	Devlin, Josephine W.		EM	
Parsons, Robert		EM		Duggins-Warf, Hannah		EM	

Duggins-Warf, Micah	EM			Romans, Barbara			EV
Goldhor, Richard S.	EM			Simoni, Diane		EM	
Haskell, Susan J.	EM			Young, Christopher	WL	EM	
Hill, Allen		EV					
Kinchen, Elizabeth	EM			Yarmouth (South), St. David's			
Kinchen, Jason	EM			Alden, Rebecca		EM	EV
McGrane, Constance	EM			Blackwell, Donald	WL	EM	EV
Meadows, Chloe	EM			Brewer, John		EM	
Minniti, Laurie	EM			Corrigan, Marueen		EM	
Nazzaro, Joseph A.	EM			Frasier, Jacqueline		EM	
Obbard, Diana		EV		Freeman, Jean		EM	
Sherwin, Jane	EM	EV		Halvorsen, Dave			EV
Street, Mary	EM	EV		Johnson, Julia		EM	
Treat, Jonathan	EM			Mavorides, Sally		EM	
Valadez, Joseph	EM			Monay, Eugene		EM	
Vaughan, Gayle Pershouse	EM	EV		Monay, Jeanette		EM	
Winterle, David	EM			Moyer, Nancy		EM	
Wiseman, Margaret		EV		O'Neill, Sonny			EV
				Parke, Beverly		EM	EV
Winthrop, St. John's				Parke, Robert		EM	EV
Aguilo, Elizabeth	EM			Reid, Susan			EV
Bailey, Peg	WL	EM	EV	Taylor, Arthur		EM	EV
Belcher, Carol	WL	EM		Vigilano, Gary		EM	
Daloia, Janet		EM		Ward, Robin		EM	
Foglia, Christine		EM		Winthrop, Bernice		EM	
Gustafson, Viking			EV				
Long, Richard	WL	EM					
Riley, George	WL	EM					
Robblee, Janice Flaherty		EM					
Shea, Julie	WL	EM					
Woburn, Trinity Church							
Cash, Jane	WL						
Crane, Jennifer		EM					
Matthews, Nancy			EV				
Newman, Jill		EM					
Poli, Karen		EM					
Sheppard, Sandy	WL						
Silvia, Frank			EV				
Slonicki, Ulla	WL						
Wollosow, Paul			EV				
Wrentham, Trinity Church							
Crocker, Patricia M.		EM	EV				
Davidson, John B.		EM	EV				
Milham, Anita		EM	EV				
Mitchell, Judi	WL	EM					
Myers, Bonnie	WL	EM					
Pelrine, Diane	WL	EM					
Podolsky, Angela		EM	EV				
Robison, Jane	WL	EM					

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Year in parentheses is last year of filing if not 2016

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Acton	The Church of the Good Shepherd	411	331	80	125	106	1	7	14
Amesbury	Episcopal Church of St James	203	199	0	54	98	0	2	7
Andover	Parish of Christ Church	981	674	20	173	106	0	9	0
Arlington	Church of Our Saviour	89	73	80	45	65	0	3	0
Arlington	St Johns Church	110	74	1	38	94	1	4	4
Attleboro	All Saints Episcopal Church	62	62	0	33	0	1	0	0
Ayer	St Andrews Episcopal Church	201	142	0	61	95	0	0	3
Barnstable	St Marys Episcopal Church	607	607	19	198	185	2	4	8
Bedford	St Pauls Episcopal Church	460	422	10	125	59	0	6	8
Belmont	All Saints Episcopal Church	142	112	30	64	89	0	0	0
Beverly	St Peters Episcopal Church	251	220	31	81	104	0	6	0
Beverly Farms	St Johns Church	1,548	1,198	350	147	107	0	15	14
Boston	Emmanuel Episcopal Church	357	357	0	136	52	4	10	0
Boston	Old North Christ Church	281	124	25	119	105	0	6	2
Boston	St Augustine and St Martin	98	98	0	41	51	0	1	0
Boston	St Stephen Episcopal Church	239	189	0	82	54	2	8	0
Boston	The Church of the Advent	774	774	0	238	154	0	6	10
Boston	Trinity Church Episcopal	2,728	557	3,627	838	163	3	14	19
Braintree	Emmanuel Episcopal Church	211	170	44	60	105	4	0	0
Bridgewater	Trinity Episcopal Church	222	210	0	69	82	0	1	0
Brookline	All Saints Parish	460	366	50	178	103	0	4	2
Brookline	Church of Our Saviour	402	124	30	77	0	0	4	0
Brookline	St Pauls Episcopal Church	508	508	0	188	105	0	7	0
Burlington	St Marks Episcopal Church	110	82	0	42	52	0	4	1
Buzzards Bay	Church of St Peters on the Canal	367	125	12	102	101	0	3	0
Cambridge	Christ Episcopal Church	671	652	21	219	132	0	4	8
Cambridge	St Bartholomews Episcopal Church	171	169	1	71	96	0	3	0
Cambridge	St James Episcopal Church	747	535	10	128	96	1	6	4
CAMBRIDGE	St Peters Episcopal Church	135	118	20	67	91	2	2	2
Canton	Trinity Church Episcopal (2013)	181	103	2	36	102	1	2	0
Charlestown	St Johns Episcopal Church	110	91	25	79	103	2	8	5
Chatham	St Christophers Church	834	584	0	190	107	0	16	9
Chelmsford	All Saints Church	715	710	20	166	107	1	8	0
Chelsea	St Lukes/San Lucas Episcopal Church	180	160	40	105	136	2	11	5

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Chestnut Hill	Church of the Redeemer	787	787	0	175	118	0	10	13
Cohasset	St Stephens Episcopal Church	779	290	0	93	100	0	11	7
Concord	Trinity Episcopal Church	1,390	787	0	216	106	0	7	10
Danvers	All Saints Episcopal Church of the North Shore	281	255	0	108	20	9	0	0
Dartmouth	St Peters Episcopal Church (2015)	45	45	0	37	52	0	7	1
Dedham	Church of the Good Shepherd	80	70	10	38	54	0	1	0
Dedham	St Pauls Church Episcopal	474	326	10	102	90	0	4	16
Dorchester	Parish of All Saints	365	320	0	132	105	1	5	2
Dorchester	St Marks Episcopal Church	96	72	4	64	48	0	6	0
Dorchester	St Mary Episcopal Church	124	97	5	58	102	0	5	1
Dover	St Dunstons Episcopal Church	221	123	9	51	53	0	0	11
Duxbury	Parish of St John the Evangelist	1,121	1,121	0	128	108	0	7	9
East Boston	Grace Federated Church	6	4	9	15	0	1	0	0
Edgartown	St Andrews Episcopal Church	137	137	0	79	117	0	7	3
Everett	Grace Episcopal Church	236	127	0	96	111	0	1	0
Fall River	Church of the Holy Spirit	182	132	10	70	157	0	0	0
Fall River	St Lukes Episcopal Church	84	49	34	37	50	0	3	4
Falmouth	St Barnabas Memorial Church	808	431	15	181	101	0	11	0
Foxborough	St Marks Episcopal Church	240	240	0	85	128	0	3	0
Framingham	St Andrews Episcopal Church	564	0	0	106	101	3	0	0
Franklin	St Johns Episcopal Church	255	255	0	74	50	2	0	2
Gloucester	St Johns Episcopal Church	441	247	50	74	93	2	0	0
Groveland	St James Episcopal Church	210	189	26	68	54	0	2	3
Hanover	St Andrews Episcopal Church	552	325	0	81	75	0	11	6
Harwich Port	Christ Episcopal Church	297	163	10	78	98	0	6	1
Haverhill	Trinity Episcopal Church	133	72	20	39	54	0	1	0
Hingham	Parish of St John the Evangelist	1,370	1,370	0	251	164	1	21	16
Holbrook	St Johns Episcopal Church	67	56	0	42	51	0	2	0
Holliston	St Michaels Church	303	250	0	86	86	0	4	6
Hopkinton	St Pauls Church Episcopal	31	27	4	25	52	0	1	0
Hudson	St Lukes Episcopal Church	184	184	0	35	49	0	5	0
Hyde Park	Iglesia de San Juan (2015)	37	35	5	15	54	0	0	0
Hyde Park	Parish of Christ Church	186	186	2	60	12	2	3	0
Ipswich	Ascension Memorial Church	395	395	9	125	109	0	6	7

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Jamaica Plain	St Johns Episcopal Church	219	219	0	50	56	0	2	0
Lawrence	Grace Episcopal Church	297	186	14	135	143	0	0	14
Lexington	Church of Our Redeemer	454	244	0	121	107	0	4	9
Lincoln	St Annes in the Fields Church	473	473	0	122	105	0	1	8
Lowell	St Annes Episcopal Church	281	230	0	92	0	0	3	2
Lowell	St Johns Episcopal Church	85	54	0	28	48	0	3	0
Lynn	St Stephens Memorial Church	368	345	87	179	122	1	6	2
Lynnfield	St Pauls Episcopal Church	322	322	0	85	0	1	2	11
Malden	St Pauls Church	114	82	0	63	0	0	0	0
Marblehead	St Michaels Church Episcopal	276	258	10	95	96	0	3	2
Marblehead	Wyman Memorial Church of St Andrew (2015)	387	303	28	103	103	0	7	10
Marion	St Gabriels Episcopal Church	504	340	112	131	102	2	4	0
Marshfield	Trinity Episcopal Church	178	146	32	53	101	1	2	0
Mattapan	Church of the Holy Spirit	440	417	0	170	1	0	3	0
Medfield	Church of the Advent	254	195	2	76	86	0	0	7
Medford	Grace Episcopal Church	456	456	0	160	140	3	4	10
Medway	Christ Church	162	61	0	32	54	0	2	5
Melrose	Trinity Episcopal Church	150	150	0	68	86	0	4	0
Methuen	St Andrews Church	248	108	26	42	52	0	2	0
Middleborough	Church of Our Saviour Episcopal	240	161	11	45	101	0	3	0
Milton	Episcopal Church of Our Saviour	53	53	0	23	50	0	1	1
Milton	St Michaels Church	719	719	0	87	102	0	7	0
Nantucket	St Pauls Episcopal Church	528	528	0	117	70	0	6	0
Natick	St Pauls Episcopal Church	651	567	32	188	122	0	5	13
Needham	Christ Church Episcopal	823	735	0	121	92	0	3	7
New Bedford	Grace Church Episcopal	650	505	0	206	143	1	2	0
New Bedford	St Andrews Church	312	0	0	54	50	0	9	1
New Bedford	St Martins Episcopal Church	131	87	10	43	46	0	3	9
Newburyport	St Pauls Episcopal Church	406	0	0	92	0	0	7	7
Newton	Grace Episcopal Church	241	232	0	88	0	0	1	4
Newton Centre	Trinity Parish of Newton Centre	66	66	6	50	49	0	0	0
Newton Highlands	St Pauls Episcopal Church	199	194	5	63	84	0	3	4
Newton Lower Falls	St Marys Episcopal Church	402	402	0	100	97	0	4	6
Newtonville	St Johns Episcopal Church	106	84	10	43	88	0	1	0

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North Andover	St Pauls Episcopal Church	311	311	56	81	83	1	4	6
North Attleboro	Grace Episcopal Church-N Attleboro	158	158	2	31	3,891	0	4	0
North Billerica	St Annes Episcopal Church	193	188	0	64	108	0	2	0
North Easton	Bristol Trinity Episcopal Church	88	69	3	33	53	0	0	0
Norwood	Grace Episcopal Church	248	248	12	57	92	0	3	3
Oak Bluffs	Trinity Episcopal Church	0	0	0	42	14	0	0	0
Orleans	The Church of the Holy Spirit	500	465	3	192	155	0	2	7
Osterville	St Peters Church Episcopal	248	153	25	79	100	0	2	0
Plymouth	Christ Church Parish	774	390	0	161	146	1	26	4
Provincetown	St Mary of the Harbor	160	141	50	57	62	1	0	0
Quincy	Christ Church	149	149	0	61	0	0	5	0
Quincy	The Parish of St Chrysostoms	149	93	12	70	51	1	3	0
Randolph	Trinity Church	188	159	0	52	90	0	1	0
Reading	Church of the Good Shepherd	377	276	0	72	0	7	0	4
Rockland	Trinity Episcopal Church	111	90	1	49	103	0	4	4
Rockport	St Marys Episcopal Church	288	264	20	109	53	0	2	0
Roxbury	St Cyprians Episcopal Church	220	0	0	126	10	0	4	0
Roxbury	St Johns St James Church	88	82	0	39	50	1	2	0
Salem	Grace Episcopal Church	563	386	23	75	115	0	1	0
Salem	St Peters Episcopal Church	363	184	18	80	0	3	0	5
Sandwich	St Johns Episcopal Church	1,061	229	131	131	153	1	8	0
Saugus	St Johns Episcopal Church	248	140	0	57	51	0	6	0
Scituate	St Lukes Episcopal Church Scituate	502	286	190	95	0	0	6	6
Sharon	St Johns Church	28	28	0	15	94	0	0	0
Shirley	Trinity Chapel	120	49	25	24	50	0	2	2
Somerset	Church of Our Saviour	496	427	40	129	104	0	6	14
Somerville	St James Episcopal Church	27	27	0	18	50	0	0	0
South Hamilton	Christ Church	332	332	38	216	144	0	11	0
South Weymouth	Church of the Holy Nativity	583	583	1	109	0	0	5	0
South Yarmouth	St Davids Church	249	238	10	118	91	0	4	0
Southborough	St Marks Church	544	325	70	141	137	0	3	0
Stoughton	Trinity Episcopal Church	125	125	0	45	66	1	5	7
Sudbury	St Elizabeths Episcopal Church	355	344	0	115	131	1	6	1
Swampscott	The Church of the Holy Name	115	115	1	64	91	0	5	0

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Swansea	Christ Episcopal Church	290	247	0	75	0	0	9	3
Taunton	Episcopal Church of St Thomas	198	195	0	103	157	0	6	7
Topsfield	Trinity Episcopal Church	581	355	14	65	99	0	1	0
Vineyard Haven	Grace Episcopal Church	145	145	8	81	102	0	2	0
Waban	Church of the Good Shepherd	234	234	0	105	92	0	1	7
Wakefield	Emmanuel Episcopal Church	182	150	1	67	91	0	9	7
Walpole	Epiphany Episcopal Church	192	132	6	61	90	0	5	8
Waltham	Christ Church Parish	382	345	0	152	108	1	13	5
Wareham	Church of the Good Shepherd	267	143	0	79	48	0	7	14
Watertown	Church of the Good Shepherd	184	165	16	58	64	2	1	0
Wellesley	St Andrews Episcopal Church	1,918	1,073	0	235	138	0	13	14
Wellfleet	Chapel of St James the Fisherman	0	0	0	67	28	0	0	0
West Newbury	All Saints Episcopal Church	32	32	0	20	0	0	2	0
West Roxbury	Parish of Emmanuel Church	61	50	5	19	52	1	0	3
Westford	St Marks Episcopal Church	278	144	0	40	58	0	1	0
Weston	St Peters Church Episcopal	572	358	0	76	105	0	3	9
Westwood	St Johns Episcopal Church	267			0				0
Whitman	All Saints Parish	130	121	0	50	98	0	3	1
Wilmington	St Elizabeths Episcopal Church	166	158	6	37	51	0	6	4
Winchester	Parish of the Epiphany	853	627	0	274	106	0	12	7
Winthrop	St Johns Episcopal Church	134	102	1	66	152	2	1	0
Woburn	Trinity Episcopal Church	164	81	5	17	1	0	2	0
Woods Hole	Church of the Messiah Epis Church	250	227	29	77	97	0	10	0
Wrentham	Trinity Episcopal Church	298	151	23	69	53	0	3	3
Total		56,981	41,298	6,010	15,124	16,551	81	683	530

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2016

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Acton	The Church of the Good Shepherd	363,000	372,668	390,212	348,586	36,767	26,947	376,630
Amesbury	Episcopal Church of St James	128,940	155,976	184,043	154,640	9,838	34,461	186,521
Andover	Parish of Christ Church	559,421	615,578	1,292,765	594,316	80,954	702,440	1,297,599
Arlington	Church of Our Saviour	139,350	146,180	146,300	151,994	12,927	7,603	157,817
Arlington	St Johns Church	97,732	130,686	189,637	143,723	19,468	427,074	571,767
Attleboro	All Saints Episcopal Church	48,178	67,374	217,748	86,311	4,280	179,256	265,710
Ayer	St Andrews Episcopal Church	143,939	196,989	298,965	180,764	16,401	127,348	299,264
Barnstable	St Marys Episcopal Church	366,883	763,699	1,050,793	725,680	48,140	99,283	853,740
Bedford	St Pauls Episcopal Church	214,305	259,441	301,947	242,563	22,382	34,208	289,575
Belmont	All Saints Episcopal Church	216,710	263,744	401,685	272,682	28,154	144,187	413,152
Beverly	St Peters Episcopal Church	154,428	382,212	508,393	296,988	31,764	34,760	328,551
Beverly Farms	St Johns Church		0	0	0		0	0
Boston	Emmanuel Episcopal Church	283,505	619,018	768,469	595,719	25,200	324,334	746,991
Boston	Old North Christ Church	163,976	412,303	423,366	444,364	15,000	4,200	455,427
Boston	St Augustine and St Martin	91,649	154,244	166,728	140,331	13,376	12,048	152,329
Boston	St Stephen Episcopal Church	106,347	127,569	2,128,692	68,884	1,600	1,761,978	1,830,862
Boston	The Church of the Advent	561,500	1,375,884	1,611,930	1,349,857	150,330	144,480	1,474,337
Boston	Trinity Church Episcopal	3,135,617	3,535,663	9,589,196	3,490,963	449,651	6,014,731	9,406,212
Braintree	Emmanuel Episcopal Church	82,814	114,243	139,136	127,667	6,000	4,150	130,817
Bridgewater	Trinity Episcopal Church	101,762	117,757	131,789	104,349	8,640	70,905	175,254
Brookline	All Saints Parish	381,153	498,403	796,786	549,264	47,161	275,122	699,940
Brookline	Church of Our Saviour	222,008	318,633	405,164	322,438	40,258	47,054	355,366
Brookline	St Pauls Episcopal Church	323,090	515,160	554,617	516,861	58,506	96,988	563,937
Burlington	St Marks Episcopal Church	78,989	132,611	157,111	119,344	10,672	20,776	132,119
Buzzards Bay	Church of St Peters on the Canal	112,068	161,055	195,754	145,536	13,963	26,699	171,052
Cambridge	Christ Episcopal Church	674,497	1,079,980	1,252,935	1,083,446	94,623	434,670	1,405,707
Cambridge	St Bartholomews Episcopal Church	144,109	191,213	194,710	180,967		13,475	194,442
Cambridge	St James Episcopal Church	237,013	453,015	571,518	467,181	45,625	157,419	561,989
CAMBRIDGE	St Peters Episcopal Church	172,040	308,645	436,725	295,845	32,907	82,282	382,243

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

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City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Canton	Trinity Church Episcopal (2013)	18,670	200,078	200,078	169,310	15,384	1,425	169,310
Charlestown	St Johns Episcopal Church	153,973	202,299	202,299	218,861	21,852	5,513	220,221
Chatham	St Christophers Church	549,914	692,243	1,041,708	688,749	78,676	244,325	948,874
Chelmsford	All Saints Church	291,873	314,726	490,128	324,416	37,949	69,593	394,009
Chelsea	St Lukes/San Lucas Episcopal Church	33,987	195,454	195,454	182,420	4,000	10,653	192,820
Chestnut Hill	Church of the Redeemer	883,543	1,061,745	2,254,282	1,014,770	129,086	95,931	1,223,962
Cohasset	St Stephens Episcopal Church	376,153	454,413	459,661	409,662	51,021	27,933	423,062
Concord	Trinity Episcopal Church	753,339	797,520	1,543,030	798,026	96,768	124,794	937,317
Danvers	All Saints Episcopal Church of the North Shore	179,479	193,606	606,891	228,467	10,624	140,783	371,639
Dartmouth	St Peters Episcopal Church (2015)	21,494	52,131	56,531	58,063	3,450	2,925	58,744
Dedham	Church of the Good Shepherd		0	0	0		0	0
Dedham	St Pauls Church Episcopal	313,751	418,743	817,337	411,753	42,287	374,865	790,347
Dorchester	Parish of All Saints	233,093	445,951	971,537	418,896	44,771	514,129	933,025
Dorchester	St Marks Episcopal Church	94,613	113,094	113,094	141,913	14,199	4,865	141,913
Dorchester	St Mary Episcopal Church	84,200	189,300	189,300	171,100	8,300	21,000	184,100
Dover	St Dunstans Episcopal Church	297,447	297,447	332,481	313,878	36,998	63,470	377,348
Duxbury	Parish of St John the Evangelist	312,577	365,078	581,777	368,132	42,283	62,781	498,087
East Boston	Grace Federated Church	12,700	30,840	30,840	383	383	100	483
Edgartown	St Andrews Episcopal Church	177,185	361,346	3,523,727	363,966	37,138	228,840	575,995
Everett	Grace Episcopal Church	47,712	87,653	87,653	125,729		0	125,729
Fall River	Church of the Holy Spirit	44,018	226,766	230,139	192,233	29,000	41,793	237,399
Fall River	St Lukes Episcopal Church	23,440	46,621	56,085	45,450	500	22,957	61,498
Falmouth	St Barnabas Memorial Church	305,983	554,472	749,164	561,637	71,964	20,184	715,290
Foxborough	St Marks Episcopal Church	153,327	176,744	176,744	151,811	14,803	200	151,811
Framingham	St Andrews Episcopal Church		0	0	0		0	0
Franklin	St Johns Episcopal Church	96,672	127,595	152,630	143,051	12,276	415	149,401
Gloucester	St Johns Episcopal Church	144,668	264,884	299,395	246,497	28,013	38,753	276,980
Groveland	St James Episcopal Church	101,816	152,721	152,721	151,028	14,758	26,276	172,987

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2016

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Hanover	St Andrews Episcopal Church	125,477	180,903	206,818	169,694	14,829	46,575	177,864
Harwich Port	Christ Episcopal Church	138,002	365,473	365,473	323,592	32,606	18,437	330,148
Haverhill	Trinity Episcopal Church	6,250	142,773	227,735	263,744	18,674	65,512	267,132
Hingham	Parish of St John the Evangelist	528,651	695,714	829,817	676,452	73,322	140,450	788,949
Holbrook	St Johns Episcopal Church	28,019	82,082	115,561	91,516	6,712	22,392	116,966
Holliston	St Michaels Church	147,610	185,329	232,050	190,648	17,838	16,770	212,718
Hopkinton	St Pauls Church Episcopal	38,242	90,759	102,537	93,925	6,081	11,734	105,148
Hudson	St Lukes Episcopal Church	65,882	83,486	95,318	76,234	4,132	14,436	90,920
Hyde Park	Iglesia de San Juan (2015)	7,397	17,787	17,787	7,000		7,000	9,708
Hyde Park	Parish of Christ Church	40,437	108,602	151,720	105,779	9,979	76,284	181,763
Ipswich	Ascension Memorial Church	235,869	304,091	345,790	271,437	29,362	11,560	291,802
Jamaica Plain	St Johns Episcopal Church	136,873	224,752	343,540	222,992	19,839	86,636	307,814
Lawrence	Grace Episcopal Church	50,994	255,044	288,044	255,014	13,856	34,860	288,153
Lexington	Church of Our Redeemer	344,445	463,941	871,540	419,135	48,817	85,727	508,008
Lincoln	St Annes in the Fields Church	521,243	566,521	922,961	654,110	83,152	13,000	654,110
Lowell	St Annes Episcopal Church	52,898	231,248	402,743	267,245	20,600	125,398	398,662
Lowell	St Johns Episcopal Church	24,447	54,975	56,615	73,512	1,794	38,945	110,912
Lynn	St Stephens Memorial Church	142,316	440,483	790,519	460,698	40,917	599,506	1,025,249
Lynnfield	St Pauls Episcopal Church	189,396	247,641	255,689	231,087	19,338	16,173	249,489
Malden	St Pauls Church	82,519	152,454	152,454	153,084	8,136	26,159	153,084
Marblehead	St Michaels Church Episcopal	257,130	350,879	444,691	352,582	36,657	1,000	381,766
Marblehead	Wyman Memorial Church of St Andrew (2015)	301,942	415,469	420,731	377,934	33,308	40,790	393,220
Marion	St Gabriels Episcopal Church	391,095	446,874	570,016	432,553	52,241	111,921	625,148
Marshfield	Trinity Episcopal Church	107,628	179,553	236,347	179,889	17,427	68,468	213,819
Mattapan	Church of the Holy Spirit	281,633	344,781	376,109	315,687	32,115	72,990	356,872
Medfield	Church of the Advent	179,867	228,234	247,294	219,546	24,162	20,282	238,795
Medford	Grace Episcopal Church	247,464	437,398	512,652	394,960	40,601	87,151	476,047
Medway	Christ Church	48,452	72,863	131,318	71,214	4,677	32,846	103,606

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2016

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Melrose	Trinity Episcopal Church	125,681	284,763	332,227	245,915	26,178	13,831	254,742
Methuen	St Andrews Church	51,408	56,162	64,501	82,740	4,419	52,046	132,740
Middleborough	Church of Our Saviour Episcopal	101,395	164,625	181,143	155,473	21,548	38,220	195,867
Milton	Episcopal Church of Our Saviour	42,869	215,197	215,197	166,025	11,808	25,993	182,018
Milton	St Michaels Church	399,726	546,315	807,650	546,315	67,473	28,782	553,235
Nantucket	St Pauls Episcopal Church	405,559	519,190	646,210	456,388	60,708	27,003	502,856
Natick	St Pauls Episcopal Church	404,439	519,323	709,108	466,992	62,607	197,360	682,260
Needham	Christ Church Episcopal	399,191	553,604	579,104	528,498	68,347	44,170	556,257
New Bedford	Grace Church Episcopal	263,992	633,739	825,207	694,909	72,910	688,922	1,367,659
New Bedford	St Andrews Church	54,005	113,900	152,465	119,057	5,983	65,977	164,225
New Bedford	St Martins Episcopal Church	41,653	97,040	119,733	94,345	4,889	30,623	130,558
Newburyport	St Pauls Episcopal Church	262,114	334,084	342,383	330,109	38,066	38,728	364,067
Newton	Grace Episcopal Church	195,122	390,822	395,822	390,822	40,963	6,874	390,822
Newton Centre	Trinity Parish of Newton Centre	157,258	498,569	525,339	493,286	35,943	547,499	1,019,532
Newton Highlands	St Pauls Episcopal Church	170,681	206,478	321,444	201,005	22,246	198,471	399,693
Newton Lower Falls	St Marys Episcopal Church		0	0	0		0	0
Newtonville	St Johns Episcopal Church	97,415	154,496	208,523	152,474	20,429	17,795	169,740
North Andover	St Pauls Episcopal Church	155,343	233,644	291,550	233,805	23,540	32,049	266,474
North Attleboro	Grace Episcopal Church-N Attleboro	113,974	163,217	173,217	202,000	24,448	14,089	214,089
North Billerica	St Annes Episcopal Church	99,695	217,297	284,621	217,739	26,631	14,703	231,612
North Easton	Bristol Trinity Episcopal Church		0	0	0		0	0
Norwood	Grace Episcopal Church	92,371	133,299	186,833	129,284	12,491	57,271	186,555
Oak Bluffs	Trinity Episcopal Church	24,188	30,988	32,388	25,443		10,060	27,678
Orleans	The Church of the Holy Spirit	447,518	644,798	802,248	635,482	74,799	316,232	932,299
Osterville	St Peters Church Episcopal	168,443	441,238	452,552	0		0	0
Plymouth	Christ Church Parish	255,587	346,613	359,732	354,096	43,207	21,563	357,674
Provincetown	St Mary of the Harbor	138,963	211,925	383,943	212,762	21,789	16,238	213,762
Quincy	Christ Church	67,022	180,797	258,484	200,753	17,778	65,458	246,434
Quincy	The Parish of St Chrysostoms	138,783	189,018	197,512	202,772	19,817	16,758	216,132

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

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City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Randolph	Trinity Church	61,619	89,935	89,935	93,656	7,352	0	93,656
Reading	Church of the Good Shepherd	139,228	193,071	214,221	151,128	19,142	106,702	257,756
Rockland	Trinity Episcopal Church	74,214	83,058	114,632	79,281	5,047	21,297	100,765
Rockport	St Marys Episcopal Church	149,194	153,956	176,819	160,071	915	1,998	162,435
Roxbury	St Cyprians Episcopal Church	177,389	219,647	219,647	228,023	26,759	201,264	228,023
Roxbury	St Johns St James Church	19,798	55,951	55,951	95,201		2,992	97,243
Salem	Grace Episcopal Church	129,696	187,863	187,863	187,863	15,992	31,681	187,863
Salem	St Peters Episcopal Church	62,419	257,694	257,694	252,353	12,427	4,980	252,353
Sandwich	St Johns Episcopal Church	198,937	242,583	259,986	227,829	38,172	40,966	266,374
Saugus	St Johns Episcopal Church	87,677	145,522	154,618	197,280	9,158	4,024	205,952
Scituate	St Lukes Episcopal Church Scituate	196,217	250,078	250,078	245,773	32,502	1,939	245,773
Sharon	St Johns Church	11,071	46,081	56,391	45,033	1,493	0	45,033
Shirley	Trinity Chapel	53,727	59,549	70,311	66,911		0	66,911
Somerset	Church of Our Saviour	127,124	156,625	156,842	142,329	10,250	12,415	144,179
Somerville	St James Episcopal Church	38,256	72,625	72,625	89,153	6,377	0	89,653
South Hamilton	Christ Church	490,202	519,114	729,382	519,417	50,313	242,256	790,923
South Weymouth	Church of the Holy Nativity	118,437	193,528	193,828	152,654	15,380	800	153,054
South Yarmouth	St Davids Church	247,255	357,018	430,111	348,678	32,090	52,318	372,133
Southborough	St Marks Church	283,265	344,792	344,792	302,804	37,335	14,224	321,089
Stoughton	Trinity Episcopal Church	71,953	115,291	117,791	98,915	13,124	18,247	112,379
Sudbury	St Elizabeths Episcopal Church	408,387	477,572	950,792	493,401	42,569	72,590	561,051
Swampscott	The Church of the Holy Name	84,434	159,575	181,489	152,449	15,750	38,672	191,121
Swansea	Christ Episcopal Church	131,415	169,160	269,160	191,405	16,751	0	191,405
Taunton	Episcopal Church of St Thomas	117,919	302,151	383,774	312,605	33,160	20,028	337,284
Topsfield	Trinity Episcopal Church	244,092	278,903	281,472	272,329	32,482	4,061	275,393
Vineyard Haven	Grace Episcopal Church	169,297	273,161	316,240	297,853	36,690	21,898	307,430
Waban	Church of the Good Shepherd	364,260	446,113	514,084	430,643	49,649	57,976	469,372
Wakefield	Emmanuel Episcopal Church	135,261	202,876	677,877	203,198	17,670	49,312	251,970
Walpole	Epiphany Episcopal Church	91,340	162,329	178,621	139,586	17,292	15,124	154,710

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2016

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Waltham	Christ Church Parish	121,625	257,046	326,968	233,081	11,381	143,397	286,908
Wareham	Church of the Good Shepherd	121,836	207,904	207,904	223,566	18,130	21,055	234,866
Watertown	Church of the Good Shepherd	156,573	213,734	233,908	209,729	7,834	10,007	214,022
Wellesley	St Andrews Episcopal Church	921,695	1,269,627	1,591,431	1,215,401	143,696	94,904	1,282,518
Wellfleet	Chapel of St James the Fisherman	53,601	59,613	98,752	59,127		34,854	66,981
West Newbury	All Saints Episcopal Church	4,606	46,476	46,476	56,473	1,300	0	56,473
West Roxbury	Parish of Emmanuel Church	41,604	69,268	71,433	69,071	1,639	3,736	70,184
Westford	St Marks Episcopal Church	133,064	179,374	234,195	145,423	11,039	53,970	196,793
Weston	St Peters Church Episcopal	341,823	518,241	636,670	481,258	64,541	438,507	899,119
Westwood	St Johns Episcopal Church	165,197	167,615	211,791	164,806	11,741	134,491	296,336
Whitman	All Saints Parish	77,986	99,947	103,297	104,119	7,528	17,272	120,369
Wilmington	St Elizabeths Episcopal Church	44,618	48,323	57,823	43,786	3,988	15,500	58,286
Winchester	Parish of the Epiphany	807,318	870,609	1,333,020	867,531	97,886	288,581	1,112,115
Winthrop	St Johns Episcopal Church	130,104	176,833	187,197	165,021	12,884	12,834	187,177
Woburn	Trinity Episcopal Church	27,317	98,953	105,603	75,943	4,350	13,397	88,877
Woods Hole	Church of the Messiah Epis Church	141,382	199,714	622,222	298,554	39,319	147,958	441,836
Wrentham	Trinity Episcopal Church	175,580	178,089	202,745	171,730	20,221	17,358	187,888
Total		32,557,235	47,821,850	73,763,266	46,753,656	4,764,577	20,418,683	65,962,584

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