

**2021 BUDGET**  
as proposed to the Diocesan Convention



Episcopal Diocese of Massachusetts  
*235th Annual Convention | November 7, 2020*



Episcopal Diocese of Massachusetts

## **2021 Budget**

**As proposed to the  
Diocesan Convention**  
*gathering online due to the coronavirus pandemic*

**November 7, 2020**

*(Term ends in November of the year listed)*

**Budget Committee**

The Rev. Mike Dangelo (2020)  
The Rev. Dn. Lori Mills-Curran (2020)  
Denise Shea (2020)  
Philip Bliedung (2021)  
Tom Phillips (2021)  
Rob Kelleher (2021)  
Betsy Ridge Madsen (2022)  
Peter Hughes (2022)  
Lynn Smith (2022)

**Mission Initiatives Committee**

David Sullivan, Chair  
The Rev. Walter Connelly, Harold Cox, Helen Gordon, The Rev. Derrick Muwina,  
The Rev. Sarah van Gulden

*Supported Congregations Subcommittee*

The Rev. Sarah Van Gulden, Convener  
The Rev. Kapyra Kaoma, The Rev. Derrick Muwina, The Rev. Dn. Ema Rosero-Nordalm

*Parish-Community Partnerships Subcommittee*

Helen Gordon, Convener  
The Rev. Ted Cole, Beth Graham Jastrezmski, The Rev. Carol Morehead

*Campus-Young Adult Subcommittee*

Harold Cox, Convener  
Jean Pitcairn, The Rev. Margaret Schwarzer, The Rev. Luther Ziegler

**Assessment Coordinating Committee**

Connie Melahoures, Chair  
Rob Kelleher, Lynn Smith

**Diocesan Staff**

The Rev. Canon Edie Dolnikowski, Liaison, MIC Campus-Young Adult Subcommittee  
Marilyn Govoni, Senior Accountant  
Tom Hamel, Controller  
The Rev. Canon Jean Baptiste Ntagengwa, Liaison, MIC Supported Parishes Subcommittee  
The Rev. Canon Bill Parnell, Canon to the Ordinary  
Chelsea Smith, Assistant Secretary of Convention  
The Rev. Dn. H. Mark Smith, Liaison, MIC Parish-Community Partnerships Subcommittee  
Tracy Sukraw, Director of Communications

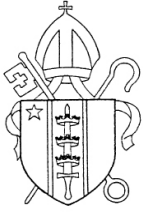
**Trustees of Donations Staff**

Charles Jordan, Investment Coordinator

*We extend our thanks to Tom Moore, former Treasurer, Virginia Rogers, former Budget Committee Chair, and Gerry Sullivan, former Chief Business Officer, for their participation in the development of the 2021 proposed budget.*

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## Episcopal Diocese of Massachusetts

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

Dear Friends in Christ,

In these uncertain days of a pandemic, this year's budget process faced extraordinary challenges in its effort to balance compassion for struggling congregations with fulfilling the goals of our mission strategy. Sharing economic burdens while safeguarding the resources to accomplish diocesan mission has been the Budget Committee's goal.

Since the early days of the pandemic, our diocese has taken proactive steps to ensure means of financial relief for the diocese and our churches. The Diocesan Council established and provided initial funding for a COVID-19 Emergency Relief Fund. The diocese and many of our churches successfully applied for the federal government's Paycheck Protection Program (PPP), through which loans have been made available to sustain salaries and operations and which may be converted into grants. Other waivers and deferrals of payment were offered by both the diocese and the Church Pension Group. In the 2021 budget, \$600,000 is set aside for targeted pandemic relief.

In May, the Budget Committee hosted two online "budget conversations." Your voices were heard in those and other forums and provided guidance for the Budget Committee, which is committed to involving as many voices as possible in determining mission priorities.

Three committees of the Diocesan Council took part in crafting this budget: the Budget Committee, with responsibility to assist the treasurer in producing a budget in which expenses do not exceed income; the Assessment Coordinating Committee, which is charged with reviewing appeals for assessment adjustments; and the Mission Initiatives Committee, which considers how we can support congregations, chaplaincies and community partnerships which are an expression of our mission strategy. These efforts are then presented to the Diocesan Council for review and modification, yielding the proposed 2021 budget presented in this book.

We believe this budget represents a responsible proposal considering today's difficult challenges while supporting our ministries of evangelism, compassion and reconciliation. As a diocese, we are blessed with resources provided by our parishes, faithful donors and many generous forbears since our establishment in 1784. We pray this budget reflects our faithful stewardship of all those upon whose shoulders we stand.

Faithfully yours,

Sr. Kristina Frances, SSM  
Secretary of Convention, for the Diocesan Council

## **BUDGET RESOLUTION**

MOVED, that the 235th Annual Convention of the Episcopal Diocese of Massachusetts approve the budget of revenue and expenses for 2021 as summarized on page 12, including the individual parish and mission assessments and approved adjustments for 2021 listed on pages 17-22.

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

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

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

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

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

## OUR MISSION

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

### **Embracing brave change**

*Keep alert, stand firm in your faith, be courageous, be strong.  
Let all that you do be done in love. (I Corinthians 16:13-14)*

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

### **Reimagining our congregations**

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

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

### **Building our relationships**

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

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

### **Engaging our world**

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

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

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

## **BUDGET OVERVIEW**

In November 2016, the annual Diocesan Convention of the Diocese of Massachusetts adopted a new mission strategy, the central theme of which is “Embracing Brave Change.” In 2020, it seems “brave change” has embraced us in ways we did not anticipate. The coronavirus pandemic has brought unexpected challenges to the entire world, with millions sickened and the deaths of hundreds of thousands, and economies shaken. Massachusetts has been hard hit, and our churches have responded nimbly, quickly putting in place live-streamed and recorded services online and stepping up efforts to serve neighbors in need, even as financial challenges mounted from lessened contributions, lost rental income and canceled events. In addition, the violence directed at people of color and immigrants has awakened the conscience of many to address the scourge of racism through systemic change in our society and in the church. The pace of climate change continues to accelerate, demanding our attention and our action. Perhaps more than in living memory, this year’s budget is crafted with much that is unknown and with a need to maintain flexibility in our diocesan response to our congregations and communities.

The 2021 budget is shaped in response both to our mission strategy and to the challenges and uncertainty of these days. The Diocesan Council presents this proposed 2021 budget with the recognition that the coming months will demand flexibility, generosity and sacrifice at every level of diocesan and congregational life. Council has been supported in the development of this budget by its Budget Committee, Assessment Coordinating Committee and Mission Initiatives Committee, as well as by ongoing conversation with the bishops and diocesan staff. As you explore this proposed 2021 diocesan budget, there are several key elements to note.

### **Assessment Relief to Congregations**

Everyone involved in crafting the 2021 budget is keenly aware of the extraordinary stresses on congregations during this time of pandemic. For that reason, the 2021 budget includes a total of \$600,000 for assessment relief to congregations.

In an ordinary year, assessment adjustments are granted to congregations through applications to the Assessment Coordinating Committee. The committee already has considered requests based on the customary criteria of dramatically changed circumstances or errors in reporting on Parochial Reports. These adjustments, totaling \$135,285, are reported in this budget book on page 16, as well as in the table of assessments by deanery on pages 17-22.

The remainder of \$464,715 is set aside for assessment relief as needs are identified by Diocesan Council. Since the early days of the pandemic in the spring, Diocesan Council has understood that some communities and congregations will be more severely affected than others, so Council is gathering data through a pandemic impact survey of all congregations at the end of the third quarter of 2020. The 2021 budget assumes that substantial resources will be needed for further assessment relief in addition to the adjustments determined through the usual application process. As Council gathers data about the impact of the pandemic on our congregations, it will determine how the additional reserve amount for assessment relief is to be distributed.

### **Compensation, Benefits and Reimbursable Expenses**

The Compensation and Benefits Committee is recommending a 1% increase in Total Clergy Compensation for parish and mission clergy in 2021. Compensation for senior diocesan staff



(bishops, canons, directors and missionaries) is held at the 2020 level, while a 1% increase is included for support staff. The compensation of two staff members has been adjusted by the bishop diocesan to reflect additional responsibilities. While medical insurance premiums are not yet set for 2021, the Compensation and Benefits Committee has alerted us to expect an 8% increase which is reflected in this budget.

The pandemic has caused us to rely far more on virtual rather than in-person gatherings. We anticipate that this will continue in the coming year, so reimbursable expense budgets for the bishops and staff have been reduced by 20%.

### **Endowment Income**

The Diocese of Massachusetts is blessed by the generosity of many from previous generations who have left bequests to the diocese. These endowment funds total approximately \$74 million and yield income estimated at \$2.9 million, a significant portion of which is restricted by terms established by the donors. These endowments are a tremendous ongoing resource for the mission of our diocese. They are invested with, and many owned by, the Trustees of Donations, a separate organization charged with the stewardship of diocesan and parish resources. The annual budget is a reminder to all of us of the importance of remembering the church in our financial planning and wills.

### **The Annual Fund**

During the Together Now campaign, which brought pledges of approximately \$32 million for diocesan and parish initiatives, receipts to the Annual Fund declined. As the majority of Together Now pledges have been paid, a renewed emphasis on the Annual Fund will be critical to the support of the mission initiatives we undertake together. While a planned appeal in spring of 2020 took a back seat to emergency pandemic relief, a robust Annual Fund campaign is planned going forward with a dual focus on youth and young adult ministries and immigration and multicultural ministries, two important goals articulated through the mission strategy and Diocesan Convention. Critical to this effort will be solicitation for the Annual Fund not only through diocesan channels but through appeals in congregations of our diocese. We encourage your support.

### **The Episcopal Church Assessment**

Episcopal Church support is determined by a formula adopted by the triennial General Convention. In recent years, the formula has been gradually reduced to 15% of general operating income of each diocese. The 2021 assessment is based on figures from 2018, the year the diocesan assessment formula was lowered by 10%. This results in a lower Episcopal Church assessment figure, estimated for 2021 at \$750,000, \$67,000 lower than the 2020 assessment.

### **Grants to Congregations**

In 2020, Diocesan Council established the COVID-19 Emergency Relief Fund to address urgent needs in congregations with grants of up to \$5,000. Council voted to reallocate up to the entire \$100,000 budget for 2020 Congregational Development Open Grants, as well as \$57,000 in 2020 Congregational Development Targeted Grants as seed money for the fund. An emergency appeal was also conducted, raising an additional amount of approximately \$124,000, bringing the total available to approximately \$281,000. Through nine rounds of funding beginning

on April 15, 2020, 76 congregations and Episcopal communities, representing all 12 deaneries, received a total of \$274,398.90. A donation of \$6,500 was made to the Massachusetts Council of Churches One Church Fund.

Similarly, the 2021 proposed budget significantly reduces Congregational Development Open and Targeted Grants, as well as Sending Serving Grants, in order to direct funds to the aforementioned targeted relief. Council anticipates reviewing grant making to congregations and restoring funding as we move beyond the urgencies of the pandemic. There is continued funding in the 2021 budget for Hispanic and African congregations, a key part of our mission strategy, and for strategic curacies, critical to the mentoring of ordained clergy.

### **Savings on Convention and Clergy Conference**

Because the annual spring Clergy Conference scheduled for May 2020 has been postponed until early 2021, and the planned two-day Diocesan Convention in Danvers has become an online gathering, pre-paid deposits on those venues are being carried over, resulting in single-year savings in 2021.

### **Mission Initiatives**

A key part of our common life in our diocese is the support of congregations and programs in economically challenged communities, on campuses and among neighbors in need. This year, the Mission Initiatives Committee, supported by three subcommittees focused on supported congregations, parish-community partnerships and campus ministries, has deepened relationships with the ministries we all support through the annual budget. The committee has focused not only on budget allocations but on what other resources might be employed to help these ministries flourish, and to promote goal-setting and sustainability. As with other areas of the 2021 budget, the overall expenses are reduced to provide greater flexibility for a targeted pandemic response.

### **Racial Justice Commission**

Newly funded in the 2021 budget is the work of our diocesan Racial Justice Commission, a body appointed by our bishops to help reckon with the legacy of racism in our own history; guide us through a racial audit of the structures of our diocesan life; provide further resources for individual and communal engagement with antiracism; and help us advocate systemic change in the church and in our society. This work is an important goal articulated in the diocesan mission strategy, that we enter “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.” The funding for the Racial Justice Commission is taken from the Coburn Fund, a restricted endowment given in honor of Bishop John B. Coburn.

### **Creation Care Justice**

Also newly funded in the 2021 budget through the Coburn Fund is a greater emphasis on care of creation. This is also a key plank of the mission strategy, “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.”

## **Managed IT Services**

In mid-2020, the company RSM was engaged to provide managed information technology services for the diocesan and cathedral offices. This will help us to undertake a much-needed update to our systems so we will be better placed to serve congregations well. Along with IT, work related to finance, diocesan and parish property, human resources and archives is often behind the scenes but absolutely critical to support our more visible efforts to strengthen our common life. We continue to evaluate ways we can provide expanded services to support the congregations of our diocese.

## **Depreciation**

As in the 2020 budget, there is an expense line for funding depreciation of equipment and property, estimated at \$331,000 and listed in the “Facilities and Administration” section of the budget. Each year our auditors recommend that we take this depreciation into account and, to be transparent about what we know will appear on our audited financial statements, the full estimate is included. Our diocesan canons require that the annual budget have income at least as great as expenses, so including the depreciation amount provides for better alignment of budgeted and audited finances and complies with best practices for not-for-profit organizations.

## **Budget Presentation**

As in 2020, the proposed 2021 budget summary on page 12 is presented as a unified budget which provides income categories, including congregational assessments and contributions, investment and endowment draws, interest and dividends, and various other income sources, and expenses, divided into seven categories and presented under two general headings: Mission Strategy Disbursements and Mission Strategy Support. Mission Strategy Disbursements generally represent funds transmitted from the diocesan accounts to other entities. These are grouped into four categories: Support for the Wider Church; Grants to Congregations; Resources for Clergy; and Mission Initiatives. Expenses listed under Mission Strategy Support generally include compensation and benefits for diocesan staff and the budgets for diocesan program areas. These are grouped in three areas: Episcopate and Governance; Resources for Congregations; and Facilities and Administration.

### **INCOME**

- Assessments (pages 14-22)
- Investments and Endowments (pages 23-25)
- Other Income Sources (page 26)

### **EXPENSES**

- Overview (page 27)
- Mission Strategy Disbursements
  - Support for the Wider Church (pages 28-29)
  - Grants to Congregations and Special Ministries (pages 30-32)
  - Resources for Clergy (pages 33-35)
  - Mission Initiatives (pages 36-42)
- Mission Strategy Support
  - Episcopate and Governance (pages 43-45)
  - Resources for Congregations (pages 46-48)
  - Facilities and Administration (pages 49-51)

**Episcopal Diocese of Massachusetts  
Budget Summary 2021 and 2020**

**INCOME**

**Assessments**

Assessments before adjustments  
Payments in lieu of Assessments  
Less: Assessment Relief to Congregations

**Total From Assessments**

**Investments and Endowments**

Agency Fund draw (4% draw rate) Restricted  
Agency Fund Draw (4 % draw Rate) Unrestricted  
Trust Fund draw (4% draw rate) Restricted  
Restricted Funds Roll Forward  
Interest income  
Dividend income  
Bishop Directed Funds

**Total Investments and Endowments**

**Other Income**

Property Rental  
Unrestricted Contributions and Misc. Income  
Annual Fund  
Restricted Contributions to Mission Initiatives  
Grants  
In-Kind Revenue  
Fee Income from Mission Initiatives

**Total From Other Sources**

**Total Income**

**EXPENSES**

**Mission Strategy Disbursements**

Support For The Wider Church  
Grants to Congregations and Special Ministries  
Resources for Clergy  
Mission Initiatives-Gross Expenses

**Mission Strategy Implementation**

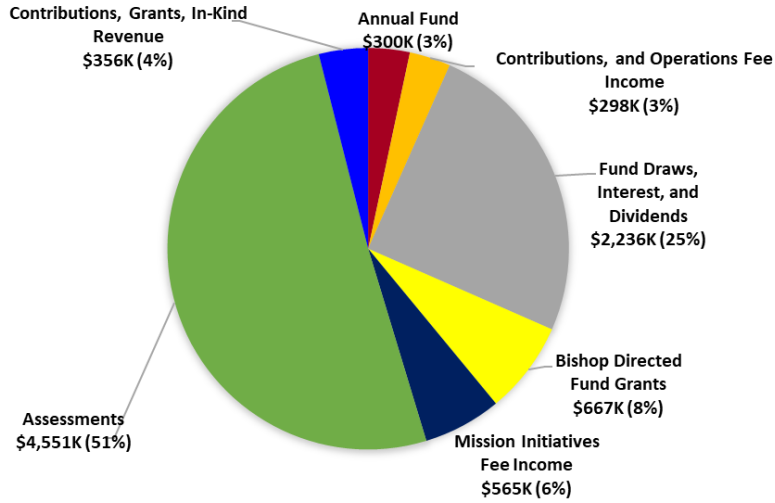
Episcopate and Governance  
Resources for Congregations  
Facilities and Administration

**Total Expenses**

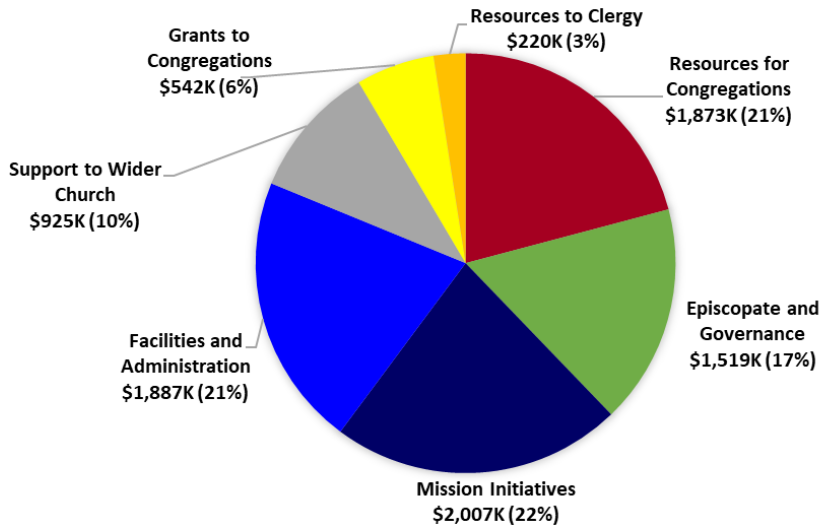
**Net surplus (deficit)**

	<b><u>2021 Budget</u></b>	<b><u>% of Total</u></b>	<b><u>2020 Budget</u></b>	<b><u>\$\$ Change</u></b>
Assessments before adjustments	5,121,464	57.1%	4,882,060	239,404
Payments in lieu of Assessments	30,000	0.3%	45,000	(15,000)
Less: Assessment Relief to Congregations	(600,000)	-6.7%	(57,078)	(542,922)
<b>Total From Assessments</b>	<b>4,551,464</b>	<b>50.7%</b>	<b>4,869,982</b>	<b>(318,518)</b>
Agency Fund draw (4% draw rate) Restricted	827,106	9.2%	798,687	28,419
Agency Fund Draw (4 % draw Rate) Unrestricted	338,056	3.8%	336,388	1,668
Trust Fund draw (4% draw rate) Restricted	924,538	10.3%	914,747	9,791
Restricted Funds Roll Forward	34,813	0.4%	20,000	14,813
Interest income	8,000	0.1%	8,000	-
Dividend income	103,200	1.2%	74,000	29,200
Bishop Directed Funds	667,288	7.4%	714,210	(46,922)
<b>Total Investments and Endowments</b>	<b>2,903,001</b>	<b>32.4%</b>	<b>2,866,032</b>	<b>36,969</b>
Property Rental	18,000	0.2%	16,580	1,420
Unrestricted Contributions and Misc. Income	279,575	3.1%	304,575	(25,000)
Annual Fund	300,000	3.3%	300,000	-
Restricted Contributions to Mission Initiatives	166,521	1.9%	133,771	32,750
Grants	107,000	1.2%	107,000	-
In-Kind Revenue	82,000	0.9%	82,000	-
Fee Income from Mission Initiatives	565,373	6.3%	407,855	157,518
<b>Total From Other Sources</b>	<b>1,518,469</b>	<b>16.9%</b>	<b>1,351,781</b>	<b>166,688</b>
<b>Total Income</b>	<b>8,972,934</b>	<b>100.0%</b>	<b>9,087,795</b>	<b>(114,861)</b>
<b><u>Mission Strategy Disbursements</u></b>		<b>41.2%</b>		
Support For The Wider Church	892,648		967,363	(74,715)
Grants to Congregations and Special Ministries	574,049		684,640	(110,591)
Resources for Clergy	220,156		253,312	(33,156)
Mission Initiatives-Gross Expenses	2,006,744		2,014,499	(7,755)
<b><u>Mission Strategy Implementation</u></b>		<b>58.8%</b>		
Episcopate and Governance	1,519,119		1,595,783	(76,664)
Resources for Congregations	1,873,170		1,743,630	129,540
Facilities and Administration	1,887,048		1,828,568	58,480
<b>Total Expenses</b>	<b>8,972,934</b>	<b>100.0%</b>	<b>9,087,795</b>	<b>(114,861)</b>
<b>Net surplus (deficit)</b>	<b>-</b>		<b>-</b>	

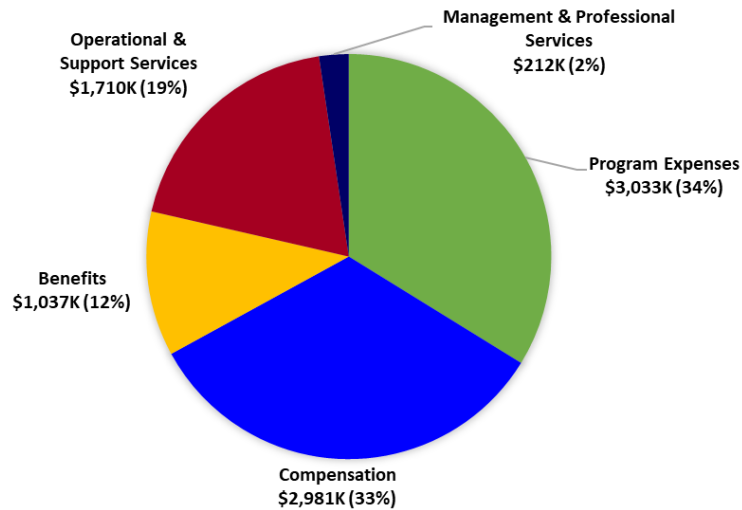
### Income:



### Expenses:



### Expenses (by Category):



## THE ASSESSMENT FORMULA: OUR COMMON SHARE

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

This assessment formula has been used in annual budgets since 2018. On March 19, 2020, Diocesan Council voted to continue this assessment formula in 2021. Congregations were notified of their actual assessments according to this formula by May 1, as required by diocesan canon.

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

Diocesan Council approved the following assessment formula:

Where BASE for 2021, according to the tiered system below, is equal to line 14 (“all other operating expenses”) from the 2018 Parochial Report, less line 7 (“assistance from diocese”), the following rates shall be applied (for a mission, the 2021 assessment is two-thirds the parish amount):

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

This assessment formula generates a gross assessment for 2021 of \$5,121,464. Included in the category of income from assessments are contributions in lieu of assessments from the Cathedral Church of St. Paul, totaling \$30,000. Christ Church (Old North), which in recent years has made a payment in lieu of assessment, is now included in the income from assessments line. Assessments for new mission congregations in union with the convention will begin in the third year after their first parochial report, e.g. 2022 for an initial parochial report filed in 2019.

### Assessment Relief to Congregations

The COVID-19 pandemic is affecting most social and financial aspects of our lives. Our congregations are not exempt. Acknowledging the likelihood of pandemic-related hardships on the ability of congregations to meet their full assessments, a budgeted total of \$600,000 for assessment relief to congregations is incorporated into the 2021 budget.



The Assessment Coordinating Committee is a committee of Diocesan Council whose charge is working with congregations to determine equitable assessments relative to each congregation's particular circumstances. A congregation wishing to apply for an assessment adjustment is encouraged to contact the Assessment Coordinating Committee as soon as it identifies the challenging situation affecting the ability to meet the annual assessment. Each spring, the committee receives applications for adjustments and makes recommendations to the Diocesan Convention. The usual criteria used by the committee and its recommendations for assessment adjustments, totaling \$135,285, are noted below.

The impact of the pandemic on congregations is still unfolding and the Diocesan Council recognizes that there will be a need for further assessment adjustments. Later this year, Council will make decisions about how other portions of this reserve, totaling \$464,715, will be distributed. A pandemic impact survey of all congregations at the end of the third quarter of 2020 will provide important data for Council's decision making.

### **Criteria for Adjustment**

Congregations submit applications for adjustments to their assessments. The Assessment Coordinating Committee bases its recommendations for adjustments to Diocesan Council on one or more of the following conditions:

- Each year, a change in circumstance of a congregation can create significant opportunities or undue hardships. In either case, the financial stresses resulting from changes in circumstances motivate congregations to seek adjustments to their annual assessments. In 2021, these challenges may include those related to COVID-19. Congregations that realize a change in circumstances that will result in the inability to meet their annual assessment are invited to apply. Examples of successful applications appear in the first table that follows.
- It is not uncommon for a congregation to determine that it has made an error or oversight in completing its Parochial Reports. Errors may result in incorrect congregational assessment. Congregations that discover such mistakes are encouraged to contact the diocesan Treasurer's Office to submit corrections. If the parochial report error is not detected until after the report is used to compute the congregation's assessment, the congregation should contact the coordinating committee to correct the error. The second table that follows gives examples of such corrections.

### **Adjustment Recommendations**

Already incorporated into this proposed budget are the Assessment Coordinating Committee's recommendations in response to 22 applications from congregations, an increase from 16 in the previous year. The amount of adjustments recommended from the spring application process is more than twice the amount of adjustments for all of 2020.

Each of the following 16 congregations has applied for assessment adjustment based on changes in its circumstances since 2018, based on the criteria noted above. The Assessment Coordinating Committee has reviewed the financial reports and narratives of each applying congregation to determine the following adjustments, which total \$101,314:

<b>City/Town</b>	<b>Congregation</b>	<b>Calculated Assessment 5/1/20</b>	<b>Reduction</b>
Boston (Roxbury)	St. John St. James Church	\$2,968	\$2,450
Cambridge	Christ Church	\$159,231	\$23,885
Cambridge	St. Bartholomew's Church	\$26,736	\$7,200
Franklin	St. John's Church	\$13,107	\$10,000
Foxboro	St. Mark's Church	\$20,087	\$2,213
Groveland	St. James's Church	\$12,825	\$2,200
Haverhill	Trinity Church	\$25,399	\$3,037
Holbrook	St. John's Church	\$6,223	\$2,610
Lynn	St. Stephen's Church	\$41,730	\$2,036
Newton	Grace Church	\$47,030	\$7,250
North Andover	St. Paul's Church	\$23,473	\$4,850
Saugus	St. John's Church	\$15,504	\$6,291
Scituate	St. Luke's Church	\$18,858	\$4,392
South Yarmouth	St. David's Church	\$35,877	\$4,000
Sudbury	St. Elizabeth's Church	\$66,680	\$10,000
Swansea	Christ Church	\$22,808	\$8,900

Six congregations have reported errors in their 2018 Parochial Reports. The coordinating committee recommends corrections totaling \$33,971, distributed as follows:

<b>City/Town</b>	<b>Congregation</b>	<b>Calculated Assessment 5/1/20</b>	<b>Adjustment</b>
Arlington	Church of Our Saviour	\$20,638	\$4,127
Barnstable	St. Mary's Church	\$79,229	\$11,673
Duxbury	St. John the Evangelist Church	\$46,529	\$3,451
Lowell	St. Anne's Church	\$23,495	\$12,000
New Bedford	St. Martin's Church	\$7,466	\$864
Wakefield	Emmanuel Church	\$19,860	\$1,856

The net income from assessments is \$4,551,464. This accounts for 50.7% of budgeted income. This compares to 2020 net budgeted income from assessments of \$4,869,982, which accounted for 53.6% of budgeted income in 2020.



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<b>ALEWIFE DEANERY</b>								
2010	Church of Our Saviour	Arlington	191,813	20,638	4,127	<b>16,511</b>	8.6%	13,436
2015	St. John's Church	Arlington	145,634	13,942		<b>13,942</b>	9.6%	10,930
2025	St. Paul's Church	Bedford	234,409	26,814		<b>26,814</b>	11.4%	26,042
2030	All Saints' Church	Belmont	267,691	31,640		<b>31,640</b>	11.8%	28,572
2045	St. Mark's Church	Burlington	109,178	8,656		<b>8,656</b>	7.9%	7,829
2050	Christ Church	Cambridge	1,105,848	159,231	23,885	<b>135,346</b>	12.2%	128,637
2055	St. Bartholomew's Church	Cambridge	233,868	26,736	7,200	<b>19,536</b>	8.4%	23,211
2060	St. James's Church	Cambridge	332,386	41,021		<b>41,021</b>	12.3%	39,364
2065	St. Peter's Church	Cambridge	296,869	35,871		<b>35,871</b>	12.1%	30,944
2085	Church of Our Redeemer	Lexington	390,014	49,377		<b>49,377</b>	12.7%	47,168
2135	St. James's Church	Somerville	71,327	3,167		<b>3,167</b>	4.4%	3,320
2145	Christ Church	Waltham	180,156	18,948		<b>18,948</b>	10.5%	4,206
8104	St Peters Congregation	Waltham		0		<b>0</b>		
2150	Church of the Good Shepherd	Watertown	142,544	13,494		<b>13,494</b>	9.5%	17,602
				<b>449,535</b>	<b>35,212</b>	<b>414,323</b>		
<b>BOSTON HARBOR DEANERY</b>								
4010	Church of the Advent	Boston	1,311,228	191,065		<b>191,065</b>	14.6%	172,599
4020	<i>Old North (Christ Church)***</i>	<i>Boston</i>	423,922	36,196		<b>36,196</b>	8.5%	
4025	Emmanuel Church	Boston	371,279	46,660		<b>46,660</b>	12.6%	44,725
4070	<i>St. Stephen's Church***</i>	<i>Boston</i>	66,156	1,612		<b>1,612</b>	2.4%	1,885
4075	Trinity Church	Boston	2,520,406	378,488		<b>378,488</b>	15.0%	403,570
1030	St. John's Church	Boston (Charlestown)	225,336	25,499		<b>25,499</b>	11.3%	25,061
4055	St. Mark's Church	Boston (Dorchester)	68,292	2,727		<b>2,727</b>	4.0%	1,940
4060	St. Mary's Church	Boston (Dorchester)	149,106	14,445		<b>14,445</b>	9.7%	13,009
3020	St. John's Church	Boston (Jamaica Plain)	234,112	26,771		<b>26,771</b>	11.4%	22,175
4035	St. Augustine's & St. Martin's Ch.	Boston (Roxbury)	128,890	11,514		<b>11,514</b>	8.9%	10,664
4040	St. Cyprian's Church	Boston (Roxbury)	188,878	20,212		<b>20,212</b>	10.7%	24,584
4050	<i>St. John's &amp; St. James's Church***</i>	<i>Boston (Roxbury)</i>	80,183	2,968	2,450	<b>518</b>	0.6%	520
				<b>758,158</b>	<b>2,450</b>	<b>755,708</b>		

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				Assessment	Adjustments	Assessment (for Vote)	Effective Rate	
<b>CHARLES RIVER DEANERY</b>								
3030	All Saints' Church	Brookline	425,582	54,534		<b>54,534</b>	12.8%	55,308
3035	Church of Our Saviour	Brookline	284,793	34,120		<b>34,120</b>	12.0%	30,510
3045	St. Paul's Church	Brookline	477,281	62,031		<b>62,031</b>	13.0%	55,367
3060	St. Dunstan's Church	Dover	276,680	32,944		<b>32,944</b>	11.9%	31,082
3105	Christ Church	Needham	511,574	67,119		<b>67,119</b>	13.1%	58,912
3110	Grace Church	Newton	373,825	47,030	7,250	<b>39,780</b>	10.6%	45,865
3125	Church of Our Redeemer	Newton (Chestnut Hill)	925,134	131,221		<b>131,221</b>	14.2%	121,297
3130	St. John's Church	Newton (Newtonville)	146,520	14,070		<b>14,070</b>	9.6%	12,257
3115	Church of the Good Shepherd	Newton (Waban)	357,476	44,659		<b>44,659</b>	12.5%	42,870
3145	Trinity Church	Newton Centre	226,248	25,631		<b>25,631</b>	11.3%	35,189
3135	St. Paul's Church	Newton Highlands	185,667	19,747		<b>19,747</b>	10.6%	19,933
3140	St. Mary's Church	Newton Lower Falls	434,642	55,848		<b>55,848</b>	12.8%	54,882
3165	St. Andrew's Church	Wellesley	1,087,629	156,407		<b>156,407</b>	14.4%	147,845
				<b>745,361</b>	<b>7,250</b>	<b>738,111</b>		
<b>CAPE AND ISLANDS DEANERY</b>								
6005	St. Mary's Church	Barnstable	589,701	79,229	11,673	<b>67,556</b>	11.5%	84,418
6010	St. Peter's Church	Buzzard's Bay	154,881	15,283		<b>15,283</b>	9.9%	12,922
6015	St. Christopher's Church	Chatham	664,196	90,775		<b>90,775</b>	13.7%	88,068
6020	St. Andrew's Church	Edgartown	353,708	44,113		<b>44,113</b>	12.5%	36,039
6030	St. Barnabas's Church	Falmouth	513,038	67,346		<b>67,346</b>	13.1%	67,187
6025	Church of the Messiah	Falmouth (Woods Hole)	261,779	30,783		<b>30,783</b>	11.8%	34,833
6040	Christ Church	Harwich Port	199,649	21,774		<b>21,774</b>	10.9%	32,476
6045	St. Paul's Church	Nantucket	400,872	50,951		<b>50,951</b>	12.7%	50,199
6050	Trinity Church	Oak Bluffs	20,648	31		<b>31</b>	0.2%	31
6055	Church of the Holy Spirit	Orleans	490,850	63,998		<b>63,998</b>	13.0%	61,766
6060	St. Peter's Church	Osterville	256,723	30,050		<b>30,050</b>	11.7%	33,244
6065	Christ Church	Plymouth	328,387	40,441		<b>40,441</b>	12.3%	39,910
6070	St. Mary's Church	Provincetown	184,810	19,622		<b>19,622</b>	10.6%	18,869
6075	St. John's Church	Sandwich	233,476	26,679		<b>26,679</b>	11.4%	23,766
6095	St. David's Church	South Yarmouth	296,912	35,877	4,000	<b>31,877</b>	10.7%	36,286
6080	Grace Church	Vineyard Haven	285,602	34,237		<b>34,237</b>	12.0%	28,539
6085	Church of The Good Shepherd	Wareham	200,581	21,909		<b>21,909</b>	10.9%	16,704
6090	Chapel of St. James the Fisherman	Wellfleet	32,145	48		<b>48</b>	0.2%	51
				<b>673,147</b>	<b>15,673</b>	<b>657,474</b>		

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<b>CONCORD RIVER DEANERY</b>								
2005	Church of the Good Shepherd	Acton	303,758	36,870		<b>36,870</b>	12.1%	37,191
2020	St. Andrew's Church	Ayer	163,146	16,481		<b>16,481</b>	10.1%	16,335
2075	Trinity Church	Concord	739,321	102,420		<b>102,420</b>	13.9%	92,518
2125	Trinity Chapel	Shirley	64,201	2,134		<b>2,134</b>	3.3%	2,004
3155	St. Mark's Church	Southborough	297,277	35,930		<b>35,930</b>	12.1%	29,907
2140	St. Elizabeth's Church	Sudbury	508,744	66,680	10,000	<b>56,680</b>	11.1%	58,230
2165	St. Peter's Church	Weston	404,553	51,485		<b>51,485</b>	12.7%	44,646
3065	St. Andrew's Church	Framingham	289,124	34,748		<b>34,748</b>	12.0%	31,229
3075	St. Michael's Church	Holliston	184,103	19,520		<b>19,520</b>	10.6%	17,974
3080	St. Paul's Church	Hopkinton	84,323	5,052		<b>5,052</b>	6.0%	4,367
2080	St. Luke's Church	Hudson	81,184	4,597		<b>4,597</b>	5.7%	4,365
2090	St. Anne's Church	Lincoln	511,752	67,147		<b>67,147</b>	13.1%	74,215
3100	St. Paul's Church	Natick	399,165	50,704		<b>50,704</b>	12.7%	54,088
				<b>493,768</b>	<b>10,000</b>	<b>483,768</b>		
<b>MOUNT HOPE - BUZZARDS BAY DEANERY</b>								
5020	St. Peter's Church	Dartmouth	57,315	1,136		<b>1,136</b>	2.0%	176
5035	Church of the Holy Spirit	Fall River	216,851	24,268		<b>24,268</b>	11.2%	16,957
5045	St. Luke's Church	Fall River	25,464	38		<b>38</b>	0.2%	47
5070	St. Gabriel's Church	Marion	425,770	54,562		<b>54,562</b>	12.8%	51,705
5080	Grace Church	New Bedford	395,390	50,157		<b>50,157</b>	12.7%	53,852
5085	St. Andrew's Church	New Bedford	88,656	5,680		<b>5,680</b>	6.4%	4,494
5090	St. Martin's Church	New Bedford	100,974	7,466	864	<b>6,602</b>	6.5%	6,451
5110	Church of Our Saviour	Somerset	138,243	12,870		<b>12,870</b>	9.3%	10,983
5115	Christ Church	Swansea	206,781	22,808	8,900	<b>13,908</b>	6.7%	18,888
				<b>178,985</b>	<b>9,764</b>	<b>169,221</b>		

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Code	Church	Location	Base	Formula Assessment	Adjustments	2021 Assessment (for Vote)	Effective Rate	Prior Year Assessment
<b>MERRIMACK VALLEY DEANERY</b>								
1005	St. James's Church	Amesbury	147,016	14,142		<b>14,142</b>	9.6%	13,796
1010	Christ Church	Andover	519,409	68,333		<b>68,333</b>	13.2%	62,413
2070	All Saints' Church	Chelmsford	304,859	37,030		<b>37,030</b>	12.1%	36,191
1055	St. James's Church	Groveland	137,934	12,825	2,200	<b>10,625</b>	7.7%	12,559
1065	Trinity Church	Haverhill	224,646	25,399	3,037	<b>22,362</b>	10.0%	16,831
1075	Grace Church	Lawrence	185,819	19,769		<b>19,769</b>	10.6%	19,501
2095	St. Anne's Church	Lowell	211,520	23,495	12,000	<b>11,495</b>	5.4%	21,561
2100	St. John's Church	Lowell	57,446	1,155		<b>1,155</b>	2.0%	3,851
1125	St. Andrew's Church	Methuen	85,825	5,270		<b>5,270</b>	6.1%	4,971
1130	St. Paul's Church	Newburyport	317,881	38,918		<b>38,918</b>	12.2%	38,674
1135	St. Paul's Church	North Andover	211,366	23,473	4,850	<b>18,623</b>	8.8%	17,869
2040	St. Anne's Church	North Billerica	231,080	26,332		<b>26,332</b>	11.4%	11,906
1195	<i>All Saints' Church***</i>	<i>West Newbury</i>	77,604	2,718		<b>2,718</b>	3.5%	2,338
2160	St. Mark's Church	Westford	135,261	12,438		<b>12,438</b>	9.2%	11,713
				<b>311,296</b>	<b>22,087</b>	<b>289,209</b>		
<b>MYSTIC VALLEY DEANERY</b>								
1025	<i>Grace Church Federated***</i>	<i>Boston (East)</i>	18,000	27		<b>27</b>	0.2%	27
1035	<i>St. Luke's/San Lucas Church***</i>	<i>Chelsea</i>	110,816	5,929		<b>5,929</b>	5.4%	5,070
1045	Grace Church	Everett	75,499	3,772		<b>3,772</b>	5.0%	4,670
1095	St. Paul's Church	Lynnfield	267,336	31,589		<b>31,589</b>	11.8%	27,745
1105	St. Paul's Church	Malden	89,256	5,767		<b>5,767</b>	6.5%	5,300
2115	Grace Church	Medford	320,534	39,302		<b>39,302</b>	12.3%	44,704
1120	Trinity Church	Melrose	202,738	22,222		<b>22,222</b>	11.0%	23,000
1145	Church of the Good Shepherd	Reading	206,492	22,766		<b>22,766</b>	11.0%	23,265
1170	St. John's Church	Saugus	156,406	15,504	6,291	<b>9,213</b>	5.9%	9,214
1190	Emmanuel Church	Wakefield	186,445	19,860	1,856	<b>18,004</b>	9.7%	18,118
2170	St. Elizabeth's Church	Wilmington	41,694	63		<b>63</b>	0.2%	63
2175	Parish of the Epiphany	Winchester	751,539	104,314		<b>104,314</b>	13.9%	103,125
1200	St. John's Church	Winthrop	152,756	14,975		<b>14,975</b>	9.8%	14,510
2180	Trinity Parish	Woburn	48,713	73		<b>73</b>	0.2%	1,094
				<b>286,162</b>	<b>8,147</b>	<b>278,015</b>		

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<b>NEPONSET RIVER DEANERY</b>								
4015	All Saints' Church	Boston (Ashmont)	457,614	59,179		<b>59,179</b>	12.9%	51,573
3005	Christ Church	Boston (Hyde Park)	71,728	3,226		<b>3,226</b>	4.5%	2,632
3015	<i>Iglesia de San Juan</i> ***	<i>Boston (Hyde Park)</i>	1,800	3		<b>3</b>	0.2%	0
4030	Church of the Holy Spirit	Boston (Mattapan)	282,983	33,858		<b>33,858</b>	12.0%	34,144
3010	Emmanuel Church	Boston (W. Roxbury)	62,102	1,830		<b>1,830</b>	2.9%	2,821
4085	Trinity Church	Canton	95,790	6,715		<b>6,715</b>	7.0%	7,603
3050	Church of the Good Shepherd	Dedham	102,603	7,702		<b>7,702</b>	7.5%	5,867
3055	St. Paul's Church	Dedham	363,971	45,601		<b>45,601</b>	12.5%	43,738
3085	Church of the Advent	Medfield	207,408	22,899		<b>22,899</b>	11.0%	22,337
3090	Christ Church	Medway	70,108	2,991		<b>2,991</b>	4.3%	2,040
4130	St. Michael's Church	Milton	493,387	64,366		<b>64,366</b>	13.0%	57,741
3150	Grace Church	Norwood	128,364	11,438		<b>11,438</b>	8.9%	10,578
5105	St. John's Church	Sharon	54,151	677		<b>677</b>	1.3%	68
4160	Trinity Church	Stoughton	113,813	9,328		<b>9,328</b>	8.2%	6,302
3160	Epiphany Church	Walpole	166,137	16,915		<b>16,915</b>	10.2%	12,719
3170	St. John's Church	Westwood	183,060	19,369		<b>19,369</b>	10.6%	16,965
				<b>306,094</b>	-	<b>306,094</b>		
<b>NORTH SHORE DEANERY</b>								
1021	St. Peter's Church	Beverly	298,035	36,040		<b>36,040</b>	12.1%	35,487
1015	St. John's Church	Beverly Farms	643,554	87,576		<b>87,576</b>	13.6%	80,790
1143	All Saints Episc. Church of N. S.	Danvers	210,779	23,388		<b>23,388</b>	11.1%	22,000
1050	St. John's Church	Gloucester	233,452	26,676		<b>26,676</b>	11.4%	26,452
1070	Ascension Memorial Church	Ipswich	270,171	32,000		<b>32,000</b>	11.8%	28,800
1090	St. Stephen's Church	Lynn	337,276	41,730	2,036	<b>39,694</b>	11.8%	39,694
1110	St. Andrew's Church	Marblehead	335,720	41,504		<b>41,504</b>	12.4%	46,510
1116	St. Michael's Church	Marblehead	340,409	42,184		<b>42,184</b>	12.4%	37,730
1155	St. Mary's Church	Rockport	167,136	17,060		<b>17,060</b>	10.2%	16,094
1160	Grace Church	Salem	131,559	11,901		<b>11,901</b>	9.0%	11,161
1165	St. Peter's Church	Salem	93,927	6,444		<b>6,444</b>	6.9%	6,966
1060	Christ Church	South Hamilton & Wenham	466,641	60,488		<b>60,488</b>	13.0%	62,148
1180	Church of the Holy Name	Swampscott	143,954	13,698		<b>13,698</b>	9.5%	13,640
1185	Trinity Church	Topsfield	219,826	24,700		<b>24,700</b>	11.2%	25,497
				<b>465,389</b>	<b>2,036</b>	<b>463,353</b>		

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<b>SOUTH SHORE DEANERY</b>								
4080	Emmanuel Church	Braintree	110,349	8,826		<b>8,826</b>	8.0%	8,597
GCHB	Grace Chapel	Brockton		0		<b>0</b>		0
4090	St. Stephen's Church	Cohasset	311,517	37,995		<b>37,995</b>	12.2%	43,036
4095	Church of St. John the Evangelist	Duxbury	370,375	46,529	3,451	<b>43,078</b>	11.6%	40,550
4100	St. Andrew's Church	Hanover	139,970	13,121		<b>13,121</b>	9.4%	10,633
4105	St. John's Church	Hingham	641,134	87,201		<b>87,201</b>	13.6%	84,887
4110	St. John's Church	Holbrook	92,401	6,223	2,610	<b>3,613</b>	3.9%	2,854
4120	Trinity Church	Marshfield Hills	148,889	14,414		<b>14,414</b>	9.7%	12,506
4125	Church of Our Saviour	Milton	170,274	17,515		<b>17,515</b>	10.3%	14,073
4135	Christ Church	Quincy	179,385	18,836		<b>18,836</b>	10.5%	16,410
4140	Parish of St. Chrysostom	Quincy (Wollaston)	208,090	22,998		<b>22,998</b>	11.1%	20,487
4145	Trinity Church	Randolph	90,188	5,902		<b>5,902</b>	6.5%	10,513
4150	Trinity Church	Rockland	75,656	3,795		<b>3,795</b>	5.0%	4,407
4155	St. Luke's Church	Scituate	179,535	18,858	4,392	<b>14,466</b>	8.1%	22,992
4165	Church of the Holy Nativity	South Weymouth	139,373	13,034		<b>13,034</b>	9.4%	13,323
5130	All Saints' Church	Whitman	91,969	6,161		<b>6,161</b>	6.7%	3,973
				<b>321,407</b>	<b>10,453</b>	<b>310,954</b>		
<b>TAUNTON RIVER DEANERY</b>								
5005	All Saints' Church	Attleboro	86,081	5,307		<b>5,307</b>	6.2%	4,755
5010	Trinity Church	Bridgewater	110,829	8,895		<b>8,895</b>	8.0%	8,203
5060	St. Mark's Church	Foxboro	188,012	20,087	2,213	<b>17,874</b>	9.5%	16,249
3070	St. John's Church	Franklin	139,875	13,107	10,000	<b>3,107</b>	2.2%	10,747
5075	Church of Our Saviour	Middleborough	137,560	12,771		<b>12,771</b>	9.3%	11,799
5095	Grace Church	North Attleboro	150,811	14,693		<b>14,693</b>	9.7%	18,247
5135	Bristol Trinity Episcopal Church	North Easton	108,572	8,568		<b>8,568</b>	7.9%	5,718
5125	St. Thomas's Church	Taunton	313,766	38,321		<b>38,321</b>	12.2%	32,998
3175	Trinity Church	Wrentham	121,296	10,413		<b>10,413</b>	8.6%	15,873
				<b>132,161</b>	<b>12,213</b>	<b>119,948</b>		
<b>TOTAL</b>	<b>ALL CONGREGATIONS</b>			<b>42,865,884</b>	<b>5,121,464</b>	<b>135,285</b>	<b>4,986,179</b>	

## **INCOME FROM INVESTMENTS AND ENDOWMENTS**

The annual budget of our diocese is supported by various endowment funds. Endowment funds fall within one of three categories: Agency Endowment Funds; Trust Endowment Funds at the direction of the Trustees of Donations; and Trust Investment Funds known as Bishop's Directed Funds.

Approximately 32.4% of total income in 2021 is in the form of draws from investments. All endowment draws are subject to the 4% multiyear draw policy. Some funds, whether owned by the diocese or by a trust, are unrestricted and not subject to restriction or designation regarding the use of the income provided through appropriate draws. These unrestricted funds represent about 8.5% of the income available in line with our spending policy. The remaining funds have some restriction on the use of the income, but in most cases the restriction is consistent with the regularly anticipated expenses of the diocese. There are a few funds, however, where the restrictions call for close monitoring and measurement. In some cases, not all available funds are utilized within a given year, resulting in surplus funds from an endowment that can build up over time. For 2021, the Budget Committee has included an additional draw of \$34,813 from two restricted endowment funds with such an available surplus.

### **Agency Endowment Funds**

*Appendix A, pages 52-56, provides a summary of the history and use of Agency Endowments in addition to a chart of market values.*

Agency Endowment Funds are a collection of funds owned outright by the diocese. The treasurer and Diocesan Council are ultimately responsible for the investment and use of these funds, though the Trustees of Donations serves as investment manager for most of the Agency Funds. Diocesan Council relies on its Financial Advisory Committee to monitor these funds, and the Council has in place a written Investment Policy Statement (see [www.diomass.org/inside/docs/investment-policy-statement](http://www.diomass.org/inside/docs/investment-policy-statement)). The spending policy draws from these funds are voted by either Diocesan Convention as part of the annual budget consideration or by Diocesan Council as needed during the year. In the audited financial statements of the diocese, the Agency Funds are included as "Investments" within the listing of Assets of the Diocese. As of June 30, 2020, the reported value of Agency Investments was \$29,734,466.

The proposed spending policy for 2021 is the same formula used by the Trustees of Donations: to draw 4% of a base that reflects the average of the market value over the past 12 trailing quarter average, calculated as of June 30, 2020.

The total spending policy income available to the 2021 budget is \$1,165,182, which is \$30,087 more than in 2020. The increase reflects two new endowment funds, as well as market appreciation.

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



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

Our 2021 budget addresses expected needs of the diocese, consistent with fund restrictions and the mission of the diocese. Most diocesan income is from congregational assessments and unrestricted endowment income, so the issue of fund restrictions arises for just a small part of the budget. Furthermore, many restrictions are consistent with current needs. Only in a few cases (designated with “R” next to the cost center and description) are there specific cost centers or programs designed to fulfill specific fund restrictions.

### **Trust Endowment Funds**

*Appendix B, page 57, provides a chart of market values.*

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

In 2021 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 2017 through June 2020. As of June 30, 2020, the reported value of these trust investments was \$23,864,146.

There are a few funds with restrictions that require the TOD to deviate from the general spending policy formula. In some cases, the distribution is limited to dividend income produced by the fund, or, in other cases, all income must be reinvested for a specific period of time. The table of projected trust income for these funds is an estimate of the income that will be available in 2021.

The total spending policy income available in 2021 (\$924,538) is an increase of \$9,791 from 2020, primarily due to market changes.

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

The TOD is the legal owner of most of the relevant trust funds and is also the investment manager for most of the agency funds directly controlled by the diocese. The TOD’s investment vehicles—the Diocesan Investment Trust (DIT) Stock Fund and the DIT Bond Fund, as well as the Fossil Fuel Free Fund—are also available to individual parishes and other Episcopal organizations for their own agency funds. There are 147 DIT participants.

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



## **Interest and Dividends**

The estimate for 2021 dividend income is \$103,200. Of this, most all is from a gift of stock received more than 40 years ago, with the request that it not be sold. The other sources of income recorded here are three charitable remainder trusts not held by the Trustees of Donations and dividend income on diocesan money market and bond mutual funds.

Interest income, estimated at \$8,000, is primarily from clergy loans.

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

## **Bishop's Directed Funds**

*Appendix C, page 58, provides a chart of market values.*

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

Of the many funds owned by the Trustees of Donations, 34 funds with a market value of approximately \$19,674,714 (as of June 30, 2020) are for the benefit of our diocese as determined by the bishop diocesan, and the Trustees of Donations provide an annual spending policy for these trusts. The generosity of past donors and the bishop diocesan makes it possible to fund new ventures in mission and mission initiatives through the diocesan budget.

The 2021 budget includes \$667,288 of income from Bishop's Directed Funds, which represents 85% of the available BDF income for the year. At the same time, the BDFs are also available to support initiatives identified by the bishop diocesan during the course of the year. For this reason, a small part of the total BDF income is held in reserve.

## **INCOME FROM OTHER SOURCES**

Various other sources of income are estimated at 16.9% of total income for 2021.

### **Property Rental**

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

### **Unrestricted Contributions and Miscellaneous Income**

An estimated \$279,575 in income is derived primarily from contributions from participants in diocesan events and programs.

### **Annual Fund**

The 2021 Annual Fund goal is set at \$300,000 to support mission initiatives. If the Annual Fund generates more than its goal, the income requirements from other sources potentially could be reduced or the additional funds could be allocated elsewhere.

### **Restricted Contributions to Mission Initiatives**

Contributions include fundraising by the Chinese Ministry and Life Together. In 2021, these contributions are budgeted at \$166,521.

### **Grants**

Grants received by diocesan programs are estimated at \$107,000 in 2021. The largest of these grants is \$30,000, a continuation of the grant from Episcopal City Mission to the Life Together program. Projected grants from external foundations total \$77,000.

### **In-Kind Income**

This line reflects use by the Life Together program of the rectory of St. Mark's Church in Dorchester, renovated at diocesan expense in 2020 and leased at no cost for 15 years, for housing of fellows, valued at \$40,000; this line also includes \$42,000 for use of the rectory of the former Church of St. Luke and St. Margaret in Allston by the Charles River Episcopal Co-Housing Endeavor (CRECHE).

### **Fee Income from Mission Initiatives**

This line reflects fees totaling \$565,373 received for Life Together site placements, consulting and rental fees, and for diocesan youth ministry programs.

### **Proceeds from Closed Congregations (No income projected for 2021)**

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

## EXPENSES

The following charts and cost center descriptions provide detail for each area of the 2021 budget. Each area of the budget is shown as follows: 2021 proposed budget with the 2020 budget (top) and the 2019 actuals (bottom) for comparison. Each row is identified by a specific cost center code and description.

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

Mission Strategy Disbursements

Support for the Wider Church (pages 28-29)

Grants to Congregations and Special Ministries (pages 30-32)

Resources for Clergy (pages 33-35)

Mission Initiatives (pages 36-42)

Mission Strategy Support

Episcopate and Governance (pages 43-45)

Resources for Congregations (pages 46-48)

Facilities and Administration (pages 49-51)

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

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

*Compensation and Benefits:* All compensation and benefit-related expenses, including 1099 payments to independent contractors. Salaries for the bishops and senior diocesan staff are held at 2020 levels, except for two staff members whose compensation has been adjusted to reflect additional responsibilities. The salaries of support staff reflect a 1% cost of living increase, as recommended by the Compensation and Benefits Committee. An estimated 8% increase in the cost of health care coverage is included for 2021.

*Operational and Support Services:* Travel, hospitality, office costs and other types of supporting expenses. Expense lines of the bishops and all staff are reduced by 20% for 2021, reflecting lower anticipated travel and hospitality expenses due to the pandemic.

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

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

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

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

<b>Support For The Wider Church 2021 Budget, 2020 Budget and 2019 Actual</b>					
	<b>2021 Budget</b>				<b>2020 Budget</b>
<b>Description</b>	<b>Program Expenses</b>	<b>Total Expenses (Gross)</b>	<b>Program Revenue Offset</b>	<b>Total Budget (Net)</b>	
CC1213 Mass. Scholarship for African Students in	12,520	12,520		12,520	12,935
CC3511 Sustainable Development Grants	37,076	37,076	-	37,076	39,376
CC3931 Episcopal City Mission	30,000	30,000	-	30,000	30,000
CC3952 Native American Ministries	1,873	1,873	-	1,873	1,873
CC4251 Mass Council of Churches	45,000	45,000	-	45,000	50,000
CC4421 Province I Assessment & Program	16,179	16,179	-	16,179	16,179
CC4431 The Episcopal Church Assessment	750,000	750,000	-	750,000	817,000
<b>Totals</b>	<b>892,648</b>	<b>892,648</b>	<b>-</b>	<b>892,648</b>	<b>967,363</b>
-R Indicates expense is fully or partially funded by funds restricted for this use					
	<b>2019 Actual</b>				
	<b>Program Expenses</b>	<b>Total Expenses (Gross)</b>	<b>Revenue Offset</b>	<b>Total</b>	
<b>2019 Actual</b>					
CC3511 Sustainable Development Grants	57,536	57,536	-	57,536	
CC3931 Episcopal City Mission	30,000	30,000	-	30,000	
CC3952 Native American Ministries	-	-	-	-	
CC4251 Mass Council of Churches	50,000	50,000	-	50,000	
CC4421 Province I Assessment & Program	16,179	16,179	-	16,179	
CC4431 The Episcopal Church Assessment	811,003	811,003	-	811,003	
<b>Totals</b>	<b>907,182</b>	<b>907,182</b>	<b>-</b>	<b>907,182</b>	

### **Support for the Wider Church**

The total 2021 budget for this area is \$892,648. The 2020 total was \$967,363.\*

*\*Note: This figure differs from the total presented in the original 2020 budget due to the re-categorization of CC1213 and CC3921.*

- Mass. Scholarship for African Students in America: 1213

This provides scholarship money from a restricted fund to assist students from the African continent studying in Massachusetts. Income is estimated at \$12,520 for 2021.

- Sustainable Development Grants: 3511

This category represents an allocation of 0.7% of unrestricted diocesan income, \$37,076 in 2021, in support of the UN Sustainable Development Goals for grants to partners in developing nations.

- Restricted Endowments and Other: 3931, 3952

These amounts represent pass-throughs for endowments restricted to Episcopal City Mission (\$30,000) and Native American ministry (\$1,873).

- Massachusetts Council of Churches: 4251

The diocesan contribution to the Massachusetts Council of Churches is reduced by \$5,000 to \$45,000.

- Province I Assessment & Program: 4421

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

- Episcopal Church Assessment: 4431

The 2018 General Convention set a fixed formula for the next three years which results in a \$750,000 ask for the Diocese of Massachusetts in 2021, reduced from \$817,000 in 2020 due to the reduced operating budget of 2018 when the diocesan staff was reorganized.

Grants To Congregations and Special Ministries						
2021 Budget, 2020 Budget and 2019 Actual						
Description	2021 Budget					2020 Budget
	Program Expenses	Operational & Support Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses (Net)
CC1001 Deaneries	-	3,840	3,840	-	3,840	4,800
CC1002 Deans	13,500	-	13,500	-	13,500	18,000
CC1101a Priest-in-Charge Consulting	10,800	-	10,800	-	10,800	12,000
CC2011 Congregational Development Open Grants	50,000	-	50,000	-	50,000	100,000
CC2012 Congregational Development Targeted Grants	10,000	-	10,000	-	10,000	60,000
CC2013 Bristol County Case Fund Grants-R	148,159	-	148,159	-	148,159	144,780
CC2014 Congregational Program Grants-R	36,721	-	36,721	-	36,721	36,694
CC2015 Special Needs Ministry Grants-R	8,000	-	8,000	-	8,000	8,000
CC2021 Sending Serving Grants	12,000	-	12,000	-	12,000	48,000
CC2022 House of Mercy Grants-R	34,356	-	34,356	-	34,356	33,780
CC2031 Hispanic Ministries	30,000	-	30,000	-	30,000	25,000
CC2131 Congregational Formation Events	20,000	2,000	22,000	-	22,000	22,500
CC2161 Congregational Consultants	2,500	-	2,500	-	2,500	7,000
CC2211 Congregational Professional Support	-	5,000	5,000	-	5,000	9,000
CC2221 Program Support -workshops and training	5,000	-	5,000	(2,000)	3,000	3,000
CC3411 Strategic Curacies -R	115,000	-	115,000	-	115,000	115,000
CC3431 African Ministries	35,000	-	35,000	-	35,000	35,000
CC3921 Barbara C. Harris Center -R	32,173	-	32,173	-	32,173	2086
<b>Totals</b>	<b>563,209</b>	<b>10,840</b>	<b>574,049</b>	<b>(2,000)</b>	<b>572,049</b>	<b>684,640</b>
-R Indicates expense is fully or partially funded by funds restricted for this use						
2019 Actual						
	Program Expenses	Operational & Support Svcs	Total Expenses (Gross)	Revenue Offset	Total Expenses (Net)	
<b>2019 Actual</b>						
CC1001 Deaneries	-	6,863	6,863	-	6,863	
CC1002 Deans	200	8,499	8,699	-	8,699	
CC1101a Priest-in-Charge Consulting	5,200	-	5,200	-	5,200	
CC1213 Mass. Scholarship for African Students in America-R	-	-	-	-	-	
CC2011 Congregational Development Open Grants	110,750	-	110,750	-	110,750	
CC2012 Congregational Development Targeted Grants	35,331	26	35,357	-	35,357	
CC2013 Bristol County Case Fund Grants-R	91,523	447	91,970	-	91,970	
CC2014 Congregational Program Grants-R	52,078	-	52,078	-	52,078	
CC2015 Special Needs Ministry Grants	-	-	-	-	-	
CC2021 Sending Serving Grants	42,550	-	42,550	-	42,550	
CC2022 House of Mercy Grants	28,954	-	28,954	-	28,954	
CC2031 Hispanic Ministries	25,000	-	25,000	-	25,000	
CC2113 Resource Day	183	1,651	1,834	(1,035)	799	
CC2131 Congregational Learning Events	963	2,875	3,838	-	3,838	
CC2161 Congregational Consultants	186	5,506	5,692	-	5,692	
CC2211 Congregational Professional Support	1,573	9,832	11,405	-	11,405	
CC2221 Program Support -workshops and training	-	8,927	8,927	-	8,927	
CC3411 Strategic Curacies -R	44,978	-	44,978	-	44,978	
CC3431 African Ministries	30,000	6,372	36,372	-	36,372	
	<b>469,469</b>	<b>50,998</b>	<b>520,467</b>	<b>-</b>	<b>519,432</b>	

## **Grants to Congregations and Special Ministries**

*Appendix D, pages 59-63, provides a chart of congregational grants in 2019.*

The total gross 2021 budget for this area is \$574,049. A program revenue offset of \$2,000 yields a net budget of \$572,049. The 2020 net budget total was \$684,640.\*

*\*Note: This figure differs from the total presented in the original 2020 budget due to the recategorization of CC1213 and CC3921.*

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

These lines, one of which is reduced by \$4,500, provide funding for gatherings of each of the 12 deaneries, deanery Confirmation expenses and expenses for each dean.

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

The amount of \$10,800, reduced from \$12,000 in 2020, funds the priests-in-charge consultants program.

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

Congregational Development Open Grants, awarded by a grants committee, are funded at \$50,000. Congregational Development Targeted Grants, awarded at the discretion of the regional canons, are funded at \$10,000. In 2020, these line items were funded at \$100,000 and \$60,000, respectively, but Diocesan Council reallocated \$157,000 to provide seed money for the COVID-19 Emergency Relief Fund. The reduced amounts in 2021 are again intended to redirect funds for targeted pandemic response.

- **Bristol County Case Grants: 2013**

The draw for this grant program is \$148,159. The intended uses of the fund's income when it was established as part of the diocesan endowment include service to Bristol County residents in need, as well as the general and religious purposes of the diocese.

- **Congregational Program Grants: 2014**

This cost center contains specific grants to congregations funded by agency or trust endowments or supplemental sources. These restricted agency endowments support grants to St. John's, Sharon; Christ Church, Plymouth; and Emmanuel Church, West Roxbury. A trust fund provides a grant to Emmanuel Church, Boston.

- **Special Needs Ministry Grants: 2015**

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

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

Each of the 12 deaneries is charged with awarding grants from two specific diocesan funds to support outreach activities. Deanery assemblies set the criteria and determine awards. Each deanery will have access to \$1,000 in 2021, reduced from \$4,000 in 2020, for Sending Serving grants, which require a match from grant recipients and are open to any outreach activity. The total of \$34,356 in account CC2022 is available to the entire diocese for House of Mercy grants,

which require a focus on women and children in need (no match necessary). The funding sources for the House of Mercy grants are agency endowment 7002Y.

- Hispanic Ministries: 2031

The 2021 budget designates \$30,000 to support Hispanic ministries in congregations, an increase of \$5,000.

- Congregational Formation Events: 2131

This funds various formation, learning and resource-sharing events for congregational leaders, budgeted at \$22,000.

- Congregational Consultants: 2161

The amount of \$2,500, reduced from \$7,000, is for the expenses incurred by congregational consultants, who help congregations with best practices in finances, buildings, leadership and stewardship.

- Congregational Professional Support: 2111

This funding, designated at \$5,000, a reduction from \$9,000 in 2020, provides consultation and other professional support, along with related expenses, for the congregations of the diocese.

- Program Support–Workshops & Training: 2221

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

- Strategic Curacies: 3411

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

- African Ministries: 3431

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

- Barbara C. Harris Camp and Conference Center: 3921

This line includes a pass-through for a restricted endowment (\$2,173) and a \$30,000 grant.





## **Resources for Clergy**

The total gross 2021 budget for this area is \$220,001, offset by \$90,600 for a net total of \$129,401. The 2020 net total was \$162,712.

- **Newly Ordained Clergy: 1101**

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

- **Sabbatical Grants for Clergy: 1211**

The funds totaling \$25,000 for clergy sabbaticals come from two sources: an agency endowment fund in honor of Bishop Norman Nash (\$9,929) and a Bishop's Directed Funds grant (\$15,071).

- **Continuing Education: 1212**

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

- **Scholarships for Clergy Dependents: 1221**

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

- **Dill Campership: 1223**

The spending policy income of \$3,556 is from a restricted Bishop's Directed Fund to support a scholarship to Camp O-At-Ka in Maine.

- **Support for Retired Clergy: 1231**

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

- **New Call: 1321**

New Call, a monthly gathering to support clergy in new assignments, is now being conducted under the guidance of the regional canons. Funding, budgeted at \$8,333 in 2020, is no longer required.

- **Diaconate Program: 1331**

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

- **Clergy Family Network: 1341**

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

- **Pre-Lenten Retreat: 1411**

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

- Clergy Conference: 1421

This funds the annual three-day spring gathering of diocesan clergy. Budgeted at \$85,000, offset by \$63,000 in fees collected, for a total net expense of \$22,000. The 2020 conference has been postponed until February 2021, so a portion of the prepaid expenses are carried over from 2020.

- Clergy Day: 1411

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

Mission Initiatives 2021 Budget 2020 Budget and 2019 Actual									
2021 Budget									2020 Budget
Description	Program Expenses	Compensation	Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total 2021 Budget (Net)	Total Expenses (Net)
CC3056 Life Together	33,000	432,895	75,420	73,490		614,805	(444,805)	170,000	175,000
CC3058 ProGente Connections	15,000	-		-	-	15,000	-	15,000	12,900
CC3061 -Grace Church Everett	37,200	-		-	-	37,200	-	37,200	40,000
CC3062 Kids In Community Lynn	22,000	-		-	-	22,000	-	22,000	12,900
CC3063 St Andrews After School Program New Bedford	13,000	-		-	-	13,000	-	13,000	12,900
CC3064 St Peters Waltham	14,000	-		-	-	14,000	-	14,000	12,900
CC3111 MIT Campus Ministry	3,293	119,746	49,167	-		172,206	(95,568)	76,638	136,257
CC3121 Boston University Campus Ministry	81,748	-		-	-	81,748	-	81,748	83,500
CC3136 BC/ NU Campus Ministries	10,500	97,096	23,030	-		130,626	-	130,626	125,564
CC3171 Tufts University Campus Ministry	33,017	-		-	-	33,017	-	33,017	32,001
CC3221 Grace Chapel Brockton	96,720	-		-	-	96,720	-	96,720	104,000
CC3231 St. Luke's/ San Lucas Chelsea	60,000	-		-	-	60,000	-	60,000	60,000
CC3241 Christ Church/San Juan Hyde Park	83,000	-		-	-	83,000	-	83,000	83,000
CC3251 St. Stephen's South End Boston	125,772	-	-	-	-	125,772	-	125,772	148,772
CC3311 Chinese Ministries Boston	5,000	30,000	5,000	-		40,000	(25,000)	15,000	20,000
CC3331 St. Mary's Dorchester	27,900	-		-	-	27,900	-	27,900	30,000
CC3341 San Pedro Salem	60,000	-		-	-	60,000	-	60,000	60,000
CC3351 Grace Church Lawrence	54,000	-		-	-	54,000	-	54,000	50,000
CC3371 St. Peter's The Bridge Dartmouth	35,000	-		-	-	35,000	-	35,000	35,000
CC3541 B-SAFE-R	175,000	-		-	-	175,000	-	175,000	185,000
CC3545 B-PEACE-R	30,000	-		-	-	30,000	-	30,000	40,000
CC3911 Cathedral Church of St Paul - Crossing -R	23,750	-		-	-	23,750	-	23,750	25,000
CC3911 Cathedral Church of St Paul - MANNA -R	20,000	-		-	-	20,000	-	20,000	18,000
CC4337 C.R.E.C.H.E. -in kind use				42,000		42,000		42,000	42,000
<b>Total - Mission Initiatives</b>	<b>1,058,900</b>	<b>679,737</b>	<b>152,617</b>	<b>115,490</b>	<b>-</b>	<b>2,006,744</b>	<b>(565,373)</b>	<b>1,441,371</b>	<b>1,544,694</b>
-R Indicates expense is fully or partially funded by funds restricted for this use									
<b>Mission Initiatives</b>									
<b>2019 Actual</b>									
Description	Program Expenses	Compensation & Benefits		Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Expenses (Net)	
CC2014 Congregational Program Grants- Grace Everett	30,000	-		-	-	30,000	-	30,000	
CC2132 Anti-Racism	-	-		993	15	1,008	(649)	359	
CC3056 Life Together	12,635	418,233		121,738	8,188	560,794	(307,335)	253,459	
CC3111 MIT Campus Ministry	-	131,798		375	-	132,173	(16,861)	115,312	
CC3121 Boston University Campus Ministry	80,000	-		-	-	80,000	-	80,000	
CC3136 BC/ NU Campus Ministries	10,230	118,703		835	-	129,768	(250)	129,518	
CC3171 Tufts University Campus Ministry	31,015	-		-	-	31,015	-	31,015	
CC3221 Grace Chapel Brockton	103,774	(4,325)		180	-	99,629	-	99,629	
CC3231 St. Luke's/ San Lucas Chelsea	60,000	-		-	-	60,000	-	60,000	
CC3241 Christ Church/San Juan Hyde Park	83,000	-		-	-	83,000	-	83,000	
CC3251 St. Stephen's South End Boston	-	159,515		-	-	159,515	-	159,515	
CC3311 Chinese Ministries Boston	9,741	9,062		2,070	-	20,873	(1,107)	19,766	
CC3331 St. Mary's Dorchester	35,000	-		-	-	35,000	-	35,000	

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

CC3341 San Pedro Salem	50,000	-	-	-	-	50,000	-	50,000
CC3351 Grace Church Lawrence	54,000	-	-	-	-	54,000	-	54,000
CC3371 St. Peter's The Bridge Dartmouth	40,500	-	-	-	-	40,500	-	40,500
CC3531 Committee on Palestine and Israel	138	-	83,579	1,963	85,680	(79,355)	6,325	
CC3541 B-SAFE-R	190,000	-	-	-	190,000	-	190,000	
CC3545 B-PEACE-R	40,000	-	314	-	40,314	-	40,314	
CC3551 Mission Through Partnerships	1,000	303	3,183	-	4,486	(1,461)	3,025	
CC3911 Cathedral Church of St Paul	49,000	-	-	-	49,000	-	49,000	
CC3953 Episcopal Relief and Development	-	-	459	-	459	-	459	
<b>Totals</b>	<b>880,033</b>	<b>833,289</b>	<b>-</b>	<b>213,726</b>	<b>10,166</b>	<b>1,937,214</b>	<b>(407,018)</b>	<b>1,530,196</b>
-R Indicates expense is fully or partially funded by funds restricted for this use								

## **Mission Initiatives**

The total gross 2021 budget for this area is \$2,006,744, compared to the 2020 gross total of \$2,014,499. Program revenue from the Life Together program and income from the Boston Chinese Ministry, both administered through the diocesan budget, yield a net budget total for 2021 of \$1,441,371, compared to the 2020 net total of \$1,544,694.

- **Life Together: 3056**

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

Eighty percent of alumni surveyed 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 traditions. Five alumni are currently discerning ordination in the Diocese of Massachusetts. In the 2020-2021 program year, Life Together will host 10 young adults in two intentional communities:

- 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.

Over the past several years, Life Together has built strong partnerships to secure substantial outside funding, resulting in a diverse and balanced funding structure. Including in-kind estimates, the total budget for the coming year is \$614,805. External funding sources include fees from sites where fellows serve (at an average of \$14,545), fundraising and grants. Diocesan funding in 2021 is set at \$170,000.

Life Together fellows live in intentional communities at two sites: diocesan property at 40 Prescott Street in Brookline and rented housing at a rectory owned by St. Michael's Church in Milton. This fall fellows will move from 40 Prescott Street to a diocesan-renovated rectory owned by St. Mark's Church in Dorchester.

- **ProGente Connections, Framingham: 3058**

A grant of \$15,000 supports work among the Brazilian community in Framingham begun as part of the Metrowest Mission Hub. ProGente Connections is housed at St. Andrew's, Framingham, and is supported by Episcopal, Lutheran and Brazilian Presbyterian churches. It provides Portuguese and English language classes and engages in immigrant advocacy and support.

- **Grace Church, Everett: 3061**

Grace Church, Everett is a church that holds worship services in three different languages every Sunday: English, Dinka and French Creole. The three congregations are growing into one church as they nurture their children in the Christian faith. A grant of \$37,200 supports this community.

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

A grant of \$22,000 funds this program at St. Stephen's, Lynn. Kids in Community provides afterschool programs for neighborhood children at low cost.

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

A grant of \$13,000 provides support to this afterschool initiative which was, for a time, part of the South Coast Mission Hub. The parish was asked by parents and children to provide additional programming for middle school youth. Diocesan support provides seed money for this effort.

- St. Peter's, Waltham: 3064

A grant of \$14,000 supports this largely Ugandan congregation which was received as a mission in 2018. It seeks to serve the immigrant communities in and around Waltham through immigration clinics and education around drug abuse.

- MIT Campus Ministry: 3111

The MIT campus ministry cost center provides for salary, expenses and benefits for a full-time chaplain employed by our diocese, plus program expenses, from a restricted endowment, of \$3,293. The ministry may raise additional funds through the MIT development office. In addition to two agency endowment funds that support campus ministry in general, an additional agency fund and a Bishop's Directed Fund provide support for the MIT ministry. Our chaplain splits her time between the activities of the Lutheran-Episcopal Ministry and the administration of Radius at MIT, which encourages students to reflect on and take action on the ethical issues of their day. Beginning August 2020, the Episcopal chaplain is serving as interim chaplain to the institute while a search is conducted. The Lutheran chaplain will increase hours during the interim period. The program revenue offset of \$95,568 includes estimated reimbursement to the diocese for a significant portion of the Episcopal chaplain's compensation and benefits, as well as estimated compensation for two support staff in the Radius program.

- Boston University Campus Ministry: 3121

The Boston University campus ministry budget provides for salary, expenses and benefits for a full-time Episcopal chaplain employed by Marsh Chapel at Boston University, funded for 2021 at \$81,748. The Episcopal chaplain participates in the religious life of the university and provides worship opportunities in the Episcopal tradition.

- Boston College-Northeastern University Campus Ministries: 3136

These two campus ministries, funded at \$130,626 in 2021, include the compensation and benefits for a full-time chaplain employed by our diocese and a program grant of \$5,250 for each campus.

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

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

- Tufts University Campus Ministry: 3171

An amount of \$33,017 provides one-half of the compensation for the Protestant chaplain, an Episcopal priest, at Tufts. The 2021 amount reflects cost-of-living increase for the half-time position. This chaplaincy is an integral part of the Tufts University Chaplaincy and works in an inclusive and ecumenical way to bear witness to the Gospel of Christ as it is expressed in main-line Christian traditions, and especially the tradition of the Episcopal Church.

- Grace Chapel, Brockton: 3221

Grace Chapel, Brockton is a vibrant multicultural Episcopal/Anglican faith community committed to expressing the healing power of God's love. Its strongest programs are its Brigade Youth Program and its Abigail's Women's Project. It became a mission of our diocese at the 2018 convention. This congregation worships and has office space in the First Lutheran Church in Brockton. The 2021 budget includes a grant to the congregation of \$96,720.

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

A grant of \$60,000 supports this growing community that seeks to bring Jesus' love to the community, both through multicultural and bilingual worship and outreach programs. It reaches out into the community with special services that reflect the ethnic traditions of its members. It engages other churches in the area by inviting them to participate in the administration of the thrift store, food distributions and community meals.

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

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

- St. Stephen's, Boston: 3251

This line represents a grant of \$125,772 to this mission congregation in Boston's South End. The vicar's compensation and benefits, formerly paid through the diocesan payroll, will be paid directly by the congregation beginning in 2021. St. Stephen's is a diverse, multigenerational Christian community which enjoys a lively liturgy that incorporates a variety of styles and music. Services are conducted in Spanish and English. In conjunction with St. Stephen's Youth Programs (SSYP), a separately incorporated not-for-profit organization, youth programs and community organizing activities help to make the church a vital community resource and a model for faith communities seeking to live out their faith in service and the struggle for justice.

- Boston Chinese Ministry: 3311

The Boston Chinese Ministry is located at the Cathedral Church of St. Paul. It is currently taking stock of its past and making plans for its future. The diocesan Treasurer's Office provides accounting services to the congregation. The 2021 gross budget of \$40,000 is offset by additional funds raised by the largely Cantonese-speaking congregation for its ministries through contributions and grants, projected at \$25,000, yielding a net budget of \$15,000.

- St. Mary's, Dorchester: 3331

The amount of \$27,900 supports this congregation in Dorchester which worships in English and Spanish. St. Mary's celebrates "God's Rhythm, Delight in God's Flavor and unites in God's Power through ministries of Joy, Diversity and Justice" as it embraces the Jesus movement. It is growing its Latinx and social justice ministries.

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

The \$60,000 grant in the 2021 budget will help the St. Peter's-San Pedro congregation which serves English and Spanish-speaking communities in Salem. The parish is experiencing significant growth in its Latino congregation. Last year, it made significant repairs to its historic church and welcomed a new bilingual priest. It has an active food pantry and thrift store.



- Grace Church, Lawrence: 3351

The \$54,000 grant in the 2021 budget supports this English and Spanish-speaking congregation in Lawrence. The congregation hosts community events, sponsors activities for youth and feeds the hungry. It was able to be helpful during the catastrophic natural gas situation in the fall of 2018 that affected Lawrence and surrounding communities. Esperanza Academy, a tuition-free, independent middle school in the Episcopal tradition welcoming girls of diverse faiths, races and cultures, is housed on the Grace Church campus.

- The Bridge, Dartmouth: 3371

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

- B-SAFE: 3541

The B-SAFE program is the summer enrichment component of the St. Stephen's Youth Programs. In collaboration with many Episcopal churches and church members as well as other volunteers and funding partners, B-SAFE offers four summer enrichment programs in Boston (at St. Stephen's, St. Augustine's and St. Martin's, Epiphany School and Holy Spirit, Mattapan), serving elementary schoolers, providing middle schoolers with leadership and life skills education, and teens and young adults with professional development training and employment in the programs. As a separate 501(c)3, Friends of St. Stephen's Youth Programs, which supports the B-SAFE and B-PEACE programs, has its own set of financial controls and development efforts. For 2021 the program is budgeted a diocesan contribution of \$175,000 from diocesan and bishop's resources.

- B-PEACE for Jorge: 3545

Established by Diocesan Convention in 2012, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge campaign is funded at \$30,000 from Bishop's Directed Funds. The campaign addresses the root causes of gun violence through five focus areas: programs for youth, employment for teens, academic excellence in schools, communities of support for families and an end to gun violence through meaningful reform. St. Stephen's Youth Programs, Boston provides staff and fundraising support for this effort. Volunteers from across the diocese, as well as interfaith and civic partners, are committed to the campaign's projects to help end violence.

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

A \$23,750 grant is budgeted to support the work of The Crossing. Its primary ministry is to provide a welcoming worship space for LGBTQIA+ and people in life transitions. It strives for inclusive language, lay leadership on par with clergy leadership and an all-encompassing welcome that communicates hope and a safe place for all.

A \$20,000 grant supports the work of the MANNA (Many Angels Needed Now and Always) ministry with the homeless community in downtown Boston. MANNA seeks not only to welcome people across differences of class, wealth, culture, race and mental ability, but also to empower all people to claim their place as essential members of our community.

- CRECHE: 4337

This line item of \$42,000 reflects the value of in-kind use of the rectory at the former Church of St. Luke and St. Margaret in Allston, now closed. The diocese has entered a multiyear lease agreement with the former Boston-Cambridge Mission Hub, now separately incorporated as the Charles River Episcopal Co-Housing Endeavor (CRECHE), for the use of this rectory as it develops intentional, multigenerational households in the metro-Boston area. CRECHE is creating a network of mixed-income, intergenerational intentional communities in cooperation with the Episcopal Church. Its mission is to create a community-focused alternative to the for-profit housing market that is rooted in relationship and mutuality: co-housing communities in which people live like families, sharing meals, common spaces and the rhythms of home care. In addition to the community housed in the Allston rectory, CRECHE founded its first community which now resides in a five-bedroom house in Newton Centre. CRECHE is a collaborative effort between four congregations: Emmanuel Church, Boston; St. Bartholomew's, Cambridge; The Crossing, Boston; and the Episcopal Chaplaincy at MIT.

Episcopate and Governance									
2021 Budget, 2020 Budget and 2019 Actual									
Description	2021 Budget								2020 Budget
	Program Expenses	Compensation	Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses (Net)
CC4000 Episcopal and Diocesan Support	-	331,883	156,969	-	-	488,852	-	488,852	506,770
CC4011 Bishop Diocesan	-	193,463	59,456	47,000	-	299,919	-	299,919	303,449
CC4012 Bishop Suffragan	-	156,598	41,631	26,000	-	224,229	-	224,229	230,617
CC4014 Canon to the Ordinary	-	132,258	46,124	10,000	-	188,382	-	188,382	188,900
CC4021 Assisting Bishops	-	-	-	10,000	-	10,000	-	10,000	30,000
CC4023 New Bp Transition Reserve	-	-	-	-	-	-	-	-	30,000
CC4024 Staff Sabbatical Reserve	-	-	-	10,000	-	10,000	-	10,000	20,000
CC4142 Lambeth Conference Reserve	-	-	-	5,000	-	5,000	-	5,000	5,000
CC4031 Chancellor	-	-	-	1,500	-	1,500	-	1,500	1,500
CC4061 Title IV	-	-	-	-	15,000	15,000	-	15,000	15,000
CC4099 Diocesan Contingency Reserve	-	-	-	32,627	16,610	49,237	-	49,237	20,047
CC4111 Diocesan Council	-	-	-	7,500	-	7,500	-	7,500	10,000
CC4112 Mission Implementation	-	-	-	36,000	-	36,000	-	36,000	40,000
CC4121 Standing Committee	-	-	-	6,000	-	6,000	-	6,000	3,000
CC4141 Diocesan Convention	25,000	-	-	18,000	-	43,000	(5,000)	38,000	47,000
CC4151 Journals and Diocesan Directory	-	-	-	5,000	-	5,000	-	5,000	5,000
CC4211 Archives	-	-	-	45,000	-	45,000	-	45,000	50,000
CC4311 Development Office	35,000	-	-	30,000	-	65,000	-	65,000	65,000
CC4261 Interreligious Commission	-	-	-	1,500	-	1,500	-	1,500	1,500
CC4411 General Convention Reserve	-	-	-	18,000	-	18,000	-	18,000	18,000
<b>Totals</b>	<b>60,000</b>	<b>814,202</b>	<b>304,180</b>	<b>309,127</b>	<b>31,610</b>	<b>1,519,119</b>	<b>(5,000)</b>	<b>1,514,119</b>	<b>1,590,783</b>
<b>2019 Actual</b>									
2019 Actual	Program Expenses	Compensation & Benefits		Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Revenue Offset	Total	
CC4000 Episcopal and Diocesan Support	-	283,762	-	1,286	-	285,048	-	285,048	
CC4011 Diocesan Bishop	523	200,423	-	71,026	42,408	314,380	-	314,380	
CC4012 Suffragan Bishop 1	71	190,776	-	47,943	273	239,063	-	239,063	
CC4014 Canon to the Ordinary	193	169,523	-	14,614	1,800	186,130	-	186,130	
CC4021 Assisting Bishops	-	28,350	-	1,540	-	29,890	-	29,890	
CC4022 Retired Bishops	81	1,251	-	4,791	32	6,155	-	6,155	
CC4023 New Bishop Search	-	-	-	30,000	-	30,000	-	30,000	
CC4024 Staff Sabbatical Reserve	-	-	-	20,000	-	20,000	-	20,000	
CC4031 Chancellor	-	-	-	-	-	-	-	-	
CC4061 Title IV	2,000	2,500	-	2,786	15,810	23,096	-	23,096	
CC4099 Diocesan Contingency Reserve	19,745	-	-	1,022	-	20,767	-	20,767	
CC4111 Diocesan Council	-	150	-	10,198	-	10,348	-	10,348	
CC4112 Mission Implementation	27,665	2,430	-	4,463	-	34,558	-	34,558	
CC4121 Standing Committee	-	-	-	3,592	230	3,822	-	3,822	
CC4141 Diocesan Convention	800	3,197	-	77,828	379	82,204	(18,997)	63,207	
CC4151 Journals and Diocesan Directory	-	-	-	-	-	-	-	-	
CC4211 Archives	-	11,823	-	1,224	439	13,486	(900)	12,586	
CC4261 Interreligious Commission	-	-	-	2,482	-	2,482	-	2,482	
CC4311 Development	1,463	216,657	-	22,766	2,459	243,345	(10,163)	233,182	
CC4411 General Convention	-	-	-	18,000	-	18,000	-	18,000	
<b>Totals</b>	<b>52,541</b>	<b>1,110,842</b>	<b>-</b>	<b>335,561</b>	<b>63,830</b>	<b>1,562,774</b>	<b>(30,060)</b>	<b>1,532,714</b>	

## **Episcopate and Governance**

The total 2021 gross budget for this area is \$1,519,306, with a program revenue offset of \$5,000, for a net total of \$1,514,306. The 2020 net total was \$1,590,783.

- **Episcopal and Diocesan Support: 4000**

This line includes compensation of \$331,883, with benefits costs estimated at \$156,969.

Staff included in these aggregate numbers are the executive assistants for the bishop diocesan and bishop suffragan, the assistant for governance and administration who also supports the canon to the ordinary, and the director of development. For a complete list of diocesan staff see Appendix F on page 65.

- **Bishop Diocesan: 4011**

This cost center includes compensation of \$193,463 for the bishop diocesan, benefits costs estimated at \$59,456, as well as a budget for expenses of \$47,000. Compensation for the bishop diocesan includes the value of living in diocesan-owned housing.

- **Bishop Suffragan: 4012**

This cost center includes compensation of \$156,598 for the bishop suffragan, benefits costs estimated at \$41,631, as well as a budget for expenses of \$26,000.

- **Canon to the Ordinary: 4014**

This cost center includes compensation of \$132,258 for the canon to the ordinary, benefits costs estimated at \$46,124, as well as a budget for expenses of \$10,000.

- **Assisting Bishops: 4021**

Stipends and costs for assisting bishops, as needed, budgeted at \$10,000, reduced from \$30,000 in 2020.

- **New Bishop Transition Reserve: 4023**

In January 2015, Diocesan Council established a long-term fund and seeded it with \$250,000 to pay for the costs associated with discernment, election and transition. Council's goal is to contribute \$50,000 per year out of the budget. No contribution is set for 2021 as a way of increasing funds available for targeted pandemic response. The Diocesan Council voted a \$250,000 extraordinary allocation in January 2015. Subsequent contributions bring the total balance in the reserve to \$450,000.

- **Staff Sabbatical Reserve: 4024**

Beginning in 2019, a reserve account is established to fund future sabbaticals of the bishop diocesan and the canons. An amount of \$20,000 normally is added to this reserve each year. In 2021, the amount is reduced to \$10,000 to provide additional funds for targeted pandemic response.

- **Lambeth Conference Reserve: 4142**

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

- Chancellor: 4031

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

- Title IV: 4061

Canonical clergy disciplinary process, budgeted at \$15,000 for 2021. This includes \$3,000 stipends for three non-staff intake officers.

- Diocesan Contingency Reserve: 4099

The entire budgeted amount of \$49,237 for 2021 represents funding for contingencies and emergencies.

- Diocesan Council: 4111

The 2021 budget of \$7,500, reduced from \$10,000 in 2020, is for expenses of Diocesan Council meetings and retreats.

- Mission Implementation: 4112

An amount of \$36,000, reduced from \$40,000 in 2020, to fund the process of implementing the mission strategy required by canon.

- Standing Committee: 4121

The 2020 budget of \$6,000 is for expenses of Standing Committee meetings and retreats. An additional \$3,000 is included in the 2021 budget to fund a consultant to review the compensation of the bishops.

- Diocesan Convention: 4141

The 2021 gross budget of \$43,000, with revenue offset of \$5,000, for a net budget of \$38,000 assumes a two-day convention, and includes costs for voting and electronic equipment rental. The estimate includes carry-over of deposits for the 2020 Convention which is being conducted virtually due to the pandemic.

- Journals and Diocesan Directory: 4151

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

- Archives: 4211

Funded at \$45,000, including anticipated expenses for archive storage and digitalization, as well as stipends for college students who assist with our archives as part of their field education.

- Development Office: 4311

An amount of \$65,000 is budgeted for events, mailings and other expenses, as well as operational and support services. Annual Fund costs are included.

- Ecumenical and Interreligious Commission: 4261

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

- General Convention: 4411

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

Resources for Congregations									
2021 Budget 2020 Budget and 2019 Actual									
Description	2021 Budget								2020 Budget
	Program Expenses	Compensation	Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses (Net)
CC1000 Support for Congregations -Personnel	-	1,003,498	400,272	68,000	-	1,471,770	-	1,471,770	1,418,630
CC1201 Clergy Transition Administration	-	-	-	-	2,000	2,000	(2,000)	-	-
CC1212 Continuing Education for Personnel	-	-	-	5,000	-	5,000	-	5,000	5,000
CC1311 Commission on Ministry	36,000	-	-	18,000	-	54,000	(7,000)	47,000	47,000
CC1312 Seminararians	54,000	-	-	-	-	54,000	-	54,000	54,000
CC1501 Support For Networks	-	-	-	8,000	-	8,000	-	8,000	10,000
CC2133 Safe Church	6,000	-	-	-	-	6,000	-	6,000	6,000
CC2231 Committee Support	-	-	-	1,000	-	1,000	-	1,000	2,000
CC2240 Racial Justice Commission	50,000	-	-	-	-	50,000	-	50,000	-
CC2241 Creation Care Justice	25,000	-	-	-	-	25,000	-	25,000	-
CC2311 Diocesan Communications Operating Exp.	-	-	-	33,600	-	33,600	-	33,600	42,000
CC3001 Young Adult Initiatives	35,000	-	-	-	-	35,000	-	35,000	20,000
CC3011 Youth Ministry-R	67,500	-	-	4,000	-	71,500	(30,000)	41,500	42,500
CC3012 Youth Leadership Academy	44,000	-	-	4,800	-	48,800	(40,000)	8,800	10,000
CC4131 Diocesan Youth Council	7,500	-	-	-	-	7,500	-	7,500	7,500
<b>Totals</b>	<b>325,000</b>	<b>1,003,498</b>	<b>400,272</b>	<b>142,400</b>	<b>2,000</b>	<b>1,873,170</b>	<b>(79,000)</b>	<b>1,794,170</b>	<b>1,664,630</b>
-R Indicates expense is fully or partially funded by funds restricted for this use									
Description	2019 Actual								
	Program Expenses	Compensation & Benefits		Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Expenses (Net)	
CC1000 Support for Congregations -Personnel	456	1,006,368		60,861	39	1,067,724	(7,925)	1,059,799	
CC1111 Transition Ministries	68	-		667	-	735	-	735	
CC1201 Clergy Transition Administration	-	-		-	5,075	5,075	(2,640)	2,435	
CC1311 Commission on Ministry	4,971	8,177		29,204	14,944	57,296	(7,820)	49,476	
CC1312 Seminararians	70,600	-		-	-	70,600	(10,248)	60,352	
CC1501 Support for Networks	-	-		-	88	88	(7,612)	(7,524)	
CC2000 CR & T	-	224,102		-	-	224,102	-	224,102	
CC2133 Safe Church	-	450		4,402	19	4,871	(720)	4,151	
CC2231 Committee Support	434	-		2,803	-	3,237	-	3,237	
CC2311 Diocesan Communications Operating Exp.	2,981	2,300		12,274	-	17,555	-	17,555	
CC2312 FYI Newsletter	-	-		2,339	-	2,339	-	2,339	
CC3011 Youth Ministry -R	63,635	131,636		7,531	331	203,133	(33,375)	169,758	
CC3012 Youth Leadership Academy	10,550	4,140		615	-	15,305	(16,579)	(1,274)	
CC4131 Diocesan Youth Council	6,754	-		914	-	7,668	(320)	7,348	
<b>Totals</b>	<b>160,449</b>	<b>1,377,173</b>		<b>121,610</b>	<b>20,496</b>	<b>1,679,728</b>	<b>(87,239)</b>	<b>1,592,489</b>	

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

## **Resources for Congregations**

The total 2021 gross budget for this area is \$1,873,170, less \$79,000 in program revenue offsets, for a net total of \$1,794,170. The 2020 net total was \$1,664,630.

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

This line contains the total compensation costs of \$1,003,498 plus benefits costs estimated at \$400,272, together with \$68,000 in operational and support services. Total personnel costs in this budget area are \$1,471,770. Staff included in this area are the three regional canons, the canon for immigration and multicultural ministries, the canon for ordained ministries, the communications director and communications assistant, the missionary for networking and formation, the youth missionary, one and a half administrative FTE positions and a part-time assistant for clergy records. For a complete list of diocesan staff see Appendix F, page 65.

- **Clergy Transition Administration: 1201**

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

- **Continuing Education for Personnel: 1212**

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

- **Commission on Ministry: 1311**

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

- **Seminarians: 1312**

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

- **Support for Networks: 1500**

The mission strategy calls for "connecting and equipping networks of lay people, clergy and diocesan staff members who share a passion for particular forms of service and public advocacy." A primary focus for the missionary for networking and formation is to facilitate the work of networks already at work and others which will emerge to lead our diocese in Christian formation and discipleship, public advocacy and witness and service to particular communities. This line item of \$8,000 helps to fund the development of these networks.

- **Safe Church: 2133**

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

- **Committee Support: 2231**

An amount of \$1,000 to provide hospitality and support for diocesan committees.

- **Racial Justice Commission: 2240**

This new line item, funded at \$50,000 through the Coburn Fund, supports the mission strategy call to enter "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."

- Creation Care Justice: 2241

This new line item, also funded through the Coburn Fund at \$25,000, supports the mission strategy goal of 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.”

- Diocesan Communications: 2311

The 2021 budget is funded at \$33,600, reduced from \$42,000 in 2020, to support a multidimensional, multimedia communications program promoting mission and ministry of our diocese and serving diverse internal and external constituencies.

- Young Adult Initiatives: 3001

In 2018 Diocesan Convention established a task force to examine successful models of engagement of adults in their 20s and 30s within and beyond the diocese; \$35,000 is allocated in the budget to fund young adult initiatives arising from the work of this task force, an increase from \$20,000 in 2020.

- Youth Programs: 3011, 3012, 4131

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



Facilities and Administration 2021 Budget, 2020 Budget and 2019 Actual								
Description	2021 Budget							2020 Budget
	Compensation	Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Revenue Offset	Total 2021 Budget (Net)	Total Expenses (Net)
CC5000 Administrative Services - Salaries	483,738	180,311	-	-	664,049	-	664,049	727,269
CC5011 Administrative Services - Operational	-	-	32,800	83,500	116,300	(135,317)	(19,017)	1,733
CC5021 Human Resources	-	-	-	6,000	6,000	-	6,000	6,000
CC5031 Information Technology	-	-	161,000	-	161,000	(40,200)	120,800	35,800
CC5041 Risk Management	-	-	-	72,649	72,649	-	72,649	72,649
CC5051 Investments Expense	-	-	-	6,000	6,000	-	6,000	6,000
CC5111 Boston, 138 Tremont Street	-	-	475,050	-	475,050	-	475,050	488,950
CC5121 Dorchester -Life Together	-	-	15,000	-	15,000	-	15,000	20,000
CC5122 Boston, Commercial Wharf Unit 6	-	-	15,000	-	15,000	-	15,000	15,000
CC5125 St Lukes St Magaret Allston	-	-	15,000	-	15,000	-	15,000	15,000
CC5141 Diocesan Properties Professional Fees	-	-	-	10,000	10,000	-	10,000	10,000
CC7501 Depreciation -Equipment and Property*	-	-	331,000	-	331,000	-	331,000	252,000
<b>Totals</b>	<b>483,738</b>	<b>180,311</b>	<b>1,044,850</b>	<b>178,149</b>	<b>1,887,048</b>	<b>(175,517)</b>	<b>1,711,531</b>	<b>1,650,401</b>
<b>2019 Actual</b>								
	Compensation & Benefits		Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Revenue Offset	Total	
<b>2019 Actual</b>								
CC5000 Administrative Services - Salaries	666,413	-	-	-	666,413	-	666,413	
CC5011 Administrative Services - Operational	-	-	26,008	109,455	135,463	-	135,463	
CC5021 Human Resources	591	-	2,444	44,258	47,293	(145,300)	(98,007)	
CC5031 Information Technology	-	-	61,006	-	61,006	-	61,006	
CC5041 Risk Management	-	-	-	79,359	79,359	(40,200)	39,159	
CC5051 Investments Expense	-	-	-	5,319	5,319	(10,179)	(4,860)	
CC5111 Boston, 138 Tremont Street	-	-	472,661	1,607	474,268	-	474,268	
CC5121 Dorchester -Life Together	13,587	-	5,677	900	20,164	(5,000)	15,164	
CC5122 Boston, Commercial Wharf Unit 6	-	-	14,712	-	14,712	(42,408)	(27,696)	
CC5125 St Lukes St Magaret Allston	11,536	-	18,310	4,852	34,698	-	34,698	
CC5141 Diocesan Properties Professional Fees	-	-	30,000	10,000	40,000	-	40,000	
CC5142 Diocesan equipment	-	-	12,500	-	12,500	-	12,500	
<b>Totals</b>	<b>692,127</b>		<b>643,318</b>	<b>255,750</b>	<b>1,591,195</b>	<b>(243,087)</b>	<b>1,348,108</b>	

## **Facilities and Administration**

The total 2021 gross budget for this area is \$1,887,048, offset by \$175,517, for a net budget of \$1,711,531. The 2020 budget total was \$1,650,401.

- **Administrative Services–Personnel: 5000**

This line contains compensation for staff assigned to this area. Compensation totals \$483,738, with benefits costs estimated at \$180,311. Total personnel costs in this line are \$664,049.

Staff included in this area are the chief business officer, controller, two accountants, payroll and benefits manager and a part-time sexton. For a complete list of diocesan staff see Appendix F, page 65.

- **Administrative Services: 5011**

This cost center includes support expenses of \$32,800 (office supplies, licenses, dues) along with outside service fees, including payroll and audit, totaling \$83,500. The cost center overall shows net income of \$19,017, as the Treasurer’s Office receives \$135,317 in fee income for financial and administrative services provided, and helps offset payroll costs associated with this work in line 5000. The largest sources of fee income are the Cathedral Church of St. Paul and the Trustees of Donations. In addition, the administrative services area receives \$25,000 per year from the Stokes Fund program to cover administrative costs associated with the loan program.

- **Human Resources: 5021**

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

- **Information Technology: 5031**

In the summer of 2020, the diocese changed to a managed IT service. The increased costs in this line are offset by a decrease in the administrative salaries line. The costs in this area cover important aspects of our operations including networking, software and hardware, Internet, telephone and conferencing, office equipment and electronic intrusion detection and prevention. The \$161,000 in costs are partially offset by fees received from the Cathedral Church of St. Paul and others of \$40,200, for a net cost of \$120,800.

- **Risk Management: 5041**

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

- **Investments Expense: 5051**

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) for making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2021 is \$6,000.

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

Included in this budget cost center is \$420,500 for payment in lieu of rent to the Cathedral Church of St. Paul and approximately \$54,550 for office equipment and postage.

- **Dorchester, 73 Columbia Road: 5121**

Cost of maintaining this property, the rectory of St. Mark’s Church, is budgeted at \$15,000. A part-time staff member is budgeted in the compensation section.

- Boston, Commercial Wharf, Unit 6: 5122

This cost center reflects \$15,000 in condominium fees for the bishop's residence.

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

The property reverted back to the diocese in 2009 after the Church of St. Luke and St. Margaret closed. The diocese has been paying for its upkeep ever since receiving direct responsibility for the property. Bishop Gates, staff and Standing Committee continue to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The budget allocation for this property is \$15,000 in 2021. A part-time staff member also provides services and that cost is included in the compensation line. The rectory on this property is now leased to CRECHE with an associated in-kind value (this is reflected in cost center 4337 in the Mission Initiatives section of the budget, as well as in a comparable amount in the In-Kind Revenue section of the Income section of the budget).

- Diocesan Properties Professional Fees: 5141

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

- Depreciation—Equipment and Property: 7501

An amount of \$331,000 to be added to a depletion and reserve fund which will be used to replace or purchase new capital equipment (computers, servers, copiers, etc.). This brings the budget in compliance with the accounting principles utilized in our audits.

## **APPENDIX A: AGENCY ENDOWMENT FUNDS AND RESERVE ACCOUNTS**

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

### **Unrestricted Agency Endowment Funds**

#### ***The General Endowment Fund*** (DIT 7002X, proposed draw \$111,929)

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

#### ***The Fund for Congregational Vitality*** (DIT 7004I, proposed draw \$192,027)

This fund was initially established in 2011 with half of the net proceeds from nine closed congregations. Since then, Council has followed the same policy of putting a portion of proceeds from other closed congregations into this endowment fund. In addition, Council has consolidated existing endowment funds that were also created through the proceeds of closed congregations going back to the mid-1980s. The spending draw from this fund helps pay for the congregational grant programs, cost centers 2011 and 2012.

#### ***Deaf Ministry Endowment*** (DIT 7004H, proposed draw \$29,771)

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

#### ***Endowment Fund - Roslindale*** (DIT 7002Z, proposed draw \$4,329)

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

### **Restricted Agency Endowment Funds**

#### ***John B. Coburn Endowment Fund*** (DIT 7002C, proposed draw \$60,187)

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

### ***Proceeds from the 1964 Diocesan Advance Fund (DAF)***

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

#### ***DAF Bishop Nash Fund*** (DIT 7002M, proposed draw \$9,929)

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 \$36,464)

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

#### ***Campus Ministries Fund*** (DIT 7002U, proposed draw \$11,471)

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

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

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

### ***Proceeds from the 1983 Adventure In Mission (AIM) Campaign***

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

#### ***AIM Christian Witness in Education*** (DIT 7003C, proposed draw \$45,699)

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

#### ***Youth on Mission*** (DIT 7003E, proposed draw \$8,661)

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

#### ***AIM William Coolidge Endowment Fund*** (DIT 7003F, proposed draw \$180,312)

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

#### ***AIM Hospital Ministry*** (DIT 7002J, proposed draw \$27,488)

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

### ***Other Various Council Designations***

#### ***Frederick C. Lawrence/Rhinelanders Fund*** (DIT 7002P, proposed draw \$12,169)

The Rt. Rev. Frederick C. Lawrence was bishop suffragan from 1956 to 1968. He also served as the chairman of the Bishop Rhinelanders 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 Rhinelanders Foundation. The draw has supported college ministry work in Cambridge through the Life Together program and the MIT chaplaincy.

#### ***African Scholarship Fund*** (DIT 7002E, proposed draw \$12,520)

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

**Endowment for Maintenance** (DIT 7002G, proposed draw \$9,676)

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

**Seminarian Education Endowment Fund** (DIT 7004E, proposed draw \$60,698)

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 \$148,159)

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 \$34,356)

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

**Designation of Gifts and Bequests for Diocesan Operations**

These funds provide general support for diocesan operations.

**Adelaide R. Harris Fund** (DIT 7002S, proposed draw \$243)

**R. W. Chisolm Fund** (DIT 7003R, proposed draw \$4,477)

**Designation of Gifts and Bequests for Diocesan Programs**

**Thomas M. Coffin Fund** (DIT 8000V, proposed draw \$6,253)

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

**A. E. Emery Camp Dennen Fund** (DIT 7002O, proposed draw \$2,145)

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 \$1,917)

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

**Caroline C. Haskett Fund** (draw 7002R, proposed draw \$97)

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 \$37,786)

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

**William V. Tripp Jr. Memorial Fund** (DIT 7003B, proposed draw \$48,397)

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 \$5,503)

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 \$3,520)

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

**Amelia Grant Schwarz Fund** (DIT 7002W, proposed draw \$22,193)

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 \$8,170)

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

**Bishop's Entertainment Fund** (DIT 8000X, proposed draw \$7,554, plus 16,000 shares Proctor & Gamble, projected \$42,400 in dividend income)

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

**Frederick A. Reeve Fund** (DIT 8000T, proposed draw \$10,548)

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

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

In January 2015, Diocesan Council established three new reserve accounts for property maintenance, episcopal elections and capital equipment, and it transferred \$1,050,000 from the General Endowment Fund to a Fidelity short term bond fund to support these reserves. The creation of these accounts reduces the need to draw upon the General Endowment Fund for capital needs. The Executive Committee of Diocesan Council responds to requests for funding from these accounts. As of June 30, 2020, this fund had a balance of \$2,097,478. In addition, there are pending proceeds from property disposition totaling \$1,750,000, and cash reserves totaling \$4,773,165 of restricted funds as of June 30, 2020.

**APPENDIX A: AGENCY ENDOWMENT FUNDS**

<b>AGENCY ENDOWMENTS</b>	<b>Market Value of</b>	
	<b>Fund -</b>	<b>4% Draw</b>
	<b>6/30/2020</b>	
D3025A KETCHUM FUND	81,028	3,098
D7002X GENERAL ENDOWMENT FUND	2,760,482	111,929
D7002C JOHN B COBURN ENDOWMENT FUND	1,542,884	60,187
D7002D C.L.T. LEE / B. WONG FUND	141,072	5,503
D7002E AFRICAN SCHOLARSHIP FUND	320,957	12,520
D7002G ENDOWMENT FOR MAINTENANCE	248,046	9,676
D7002J AIM / HOSPITAL MINISTRY	704,518	27,488
D7002L HARRIET G AVERILL FUND	49,130	1,917
D7002M D A F BISHOP NASH FUND	254,539	9,929
D7002N CLERGY SALARY FUND	934,737	36,464
D7002O A E EMERY CAMP DENNEN FUND	54,977	2,145
D7002P FREDRICK C LAWRENCE/RHINELANDER FUND	311,956	12,169
D7002R CAROLINE C HASKETT FUND	2,486	97
D7002S ADELAIDE R HARRIS FUND	6,231	243
D7002T THE ELIZA GRAY CASE TRS P E C	3,798,026	148,159
D7002U CAMPUS MINISTRIES FUND	294,057	11,471
D7002W AMELIA GRANT SCHWARZ FUND	550,554	22,193
D7002Y HOUSE OF MERCY FUND	878,895	34,356
D7002Z ENDOWMENT FUND - ROSLINDALE	110,959	4,329
D7003A THE JESSIE B COX FUND	968,651	37,786
D7003B WILLIAM V. TRIPP JR. MEMORIAL FUND	1,240,660	48,397
D7003C AIM CHRISTIAN WITNESS IN EDUC	1,171,484	45,699
D7003D MAURINE C COBURN TRUST	209,433	8,170
D7003E YOUTH ON MISSION	222,032	8,661
D7003F AIM WILLIAM COOLIDGE ENDOWMENT FD	4,622,279	180,312
D7003R W. CHISOLM FUND	114,755	4,477
D7004E SEMINARIAN EDUCATIONAL ENDOWMENT	1,555,974	60,698
D7004H DEAF MINISTRY ENDOWMENT	763,241	29,771
D7004I FUND FOR CONGREGATIONAL VITALITY ELIZABETH BRADFORD STORER & FLORENCE	4,920,468	192,027
D7004K BARTLETT STORER MEMORIAL FUN	185,411	7,416
D8000T FREDERICK A REEVE FUND	270,398	10,548
D8000V THOMAS M COFFIN FUND	160,284	6,253
D8000W A. JACKSON FUND	90,224	3,520
D8000X BISHOPS ENTERTAINMENT	193,640	7,554
<b>TOTAL</b>	<b>29,734,466</b>	<b>1,165,162</b>



**APPENDIX B: TRUST ENDOWMENT FUNDS**

<b>TRUST ENDOWMENTS</b>	<b>Market Value of Fund - 6/30/2020</b>
D1140I NORDEN MEMORIAL FUND	45,219
D1150B ST. PAUL'S CHURCH REVERE	24,334
D1175A JOEL FOOTE BINGHAM FUND	132,305
D1175B BLANCHE MARCY FUND	251,272
D2110A SARAH A MCALLISTER FUND	3,886
D2110B G & S TURNER MEMORIAL FUND	16,289
D2130A SARAH T WEAVER FUND II	178,390
D4065A ST MATTHEWS ENDOWMENT FD	178,178
D4065B SAMUEL & EMMA DOWNING FD	9,390
D4065C JOSEPH C STOREY FUND	103,400
D4065D MARY A WILSON FUND	54,453
D4065E A SMITH FUND FOR RECTORY MAINTENANCE	78,872
D4065G MARTHA TERRY FUND	330
D5015A AE GOVE MEMORIAL FUND	30,470
D5015C FRANK H. BURNETT FUND	64,031
D7000A DIOCESAN ENDOWMENT FUND	5,451,144
D7000B VOTE OF CORP DIOCESAN FUND - VOC	2,165,980
D7000D FAY DONATION I	282,820
D7000G BENJAMIN LEEDS FUND - VOC	5,805,262
D7000I CHURCHES AND CHAPELS FUND - VOC	104,859
D7001E APPLETON FUND	58,694
D7001F BISHOP'S FUND	1,377,078
D7001G BISHOP OF MA SALARY FUND	173,387
D7001H BISHOPS HOUSE FUND	284,614
D7001I SUFFRAGAN BISHOPS FUND	1,114,460
D7001J CAMILLA DAVENPORT FUND	43,653
D7001K CORNELIA A FRENCH FUND	975,878
D7001L KATHERINE FRENCH FUND	202,827
D7001O ETHEL A CLARK FUND	1,336,782
D7001Q MARY K D BABCOCK FD I	310,528
D7001R MARY K D BABCOCK FD II	38,756
D7001S JULIA K DAVEY FUND	96,506
D7001T WILLIAM C WINSLOW FUND - VOC	14,140
D7001W WK OF MERCY HARVISON FUND	52,219
D7001X AMY YEAMES FUND	62,653
D7001Y EDITH MUNRO FUND	27,363
D7002Q AC BULLARD FD STUDENTS	263,307
D7003X PATTON MEMORIAL FUND	1,423,773
D7004B PATTON FUND FOR MAINTENANCE	117,422
D7004C KATHERINE M. FOSTER TRUST	247,809
D7004D FRANK H. BURNETT FUND	51,301
D8050B KATHERINE K ABBOTT FUND	146,996
D9000Z ABBY BROWN TRUST - VOC	205,608
D9001B EDMUND F SLAFTER FUND II	257,507
<b>TOTAL</b>	<b>23,864,146</b>

**APPENDIX C: BISHOP DIRECTED ENDOWMENT FUNDS**

	<b>Market Value of Fund - 6/30/2020</b>
<b>UNRESTRICTED BDF ENDOWMENTS</b>	
D8000B BISHOPS UNREST. DISCRETIONARY FUND	3,969,102
D8000D MARIA A APPLETON DODGE FUND	1,746,549
D8000G MARGARET KIMBALL FUND	69,863
D8000J THOMAS NELSON MEMORIAL FUND	24,227
D8000K S & F ROWE FUND	24,332
D8000L VALENTINE SLATERY FUND	21,828
D8000P AMELIA WORTHINGTON FUND II	665,331
D8000U H.S. HOWE FUND	1,474,574
D9000M SARAH H A BURNHAM FUND	1,832,790
D9000N THERESA COOLIDGE FUND	123,821
D9000Q ELIZA S HATFIELD FUND - VOC	1,357,540
D9000S FRANCIS S PARKER FUND	745,580
D9000U AGNES WINSLOW RILEY FUND	377,658
D9000V SARAH L SLATTERY FUND	133,184
D9000X FRANCES L WHITTEMORE FUND	156,702
D9000Y ROBERT E TOWNSEND TRUST - VOC	92,210
	<hr/> <b>12,815,290</b>

	<b>Market Value of Fund - 6/30/2020</b>
<b>RESTRICTED BDF ENDOWMENTS</b>	
D7001C PERCIVAL L & JULIA A POWELL	362,569
D8000A MONKS/STEVENS/PITTMAN	759,997
D8000C ANNIE O BALDWIN FUND II	16,630
D8000E PAULINE CONY DROWN FUND	61,212
D8000F HILL FUND	318,136
D8000H LAURA R LITTLE MEMORIAL FUND	60,506
D8000I EDWARD F MCINTIRE FUND	18,067
D8000M PATIENCE H SLOANE FUND	240,211
D8000N GEORGE AUGUSTUS STRONG MEM FUND	38,643
D8000O AMELIA WORTHINGTON FUND I	460,679
D8000Q SHERBONDY FUND	4,636
D8000R THE DILL FUND	89,103
D8000S ANNA MUIRSON JOHNSON BELLAMY FD	32,069
D9000L EAST CAMBRIDGE FUND - ASCENSION	91,804
D9000O FAY DONATION II	282,819
D9000P WILLIAM A GATCHELL FUND	897,775
D9000T SWANSEA RESTHOUSE FUND	3,021,590
D9000W C HARRISON SOWDON FUND - VOC	102,976
	<hr/> <b>6,859,424</b>

**APPENDIX D: GRANTS TO CONGREGATIONS, COMMUNITY PARTNERS,  
CLERGY DEPENDENTS AND GLOBAL PARTNERS IN 2019**

*Grants shown are those awarded within calendar year 2019.*

*On occasion grant awards are withheld until the next year pending resolution of compliance issues. The corresponding 2019 actual numbers shown in tables referenced in each section may differ due to grants being distributed in a different year, as well as associated operational and support services.*

**African Ministries Grants**

*See 2019 Actual table in Grants to Congregations and Special Ministries, CC3431, page 30.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
Grace	Brockton	Boys' and Girls' Brigade Music Program	\$5,000
Grace	Everett	Dinka Mobilization and Children Evangelism	\$6,250
Christ Church	Hyde Park	Summer Music and Multicultural Program	\$6,250
St. Stephen's (Kenyan)	Lynn	Eneza Injili-Spreading the Gospel through Music	\$6,250
St. Peter's	Waltham	Intergenerational Praise and Worship Program	\$6,250
<b>Total</b>			<b>\$30,000</b>

**Case Trust/Bristol County Fund**

*See 2019 Actual table in Grants to Congregations and Special Ministries, CC2013, page 30. These grants are supported by the Eliza Gray Case Trust, DIT 7002T.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
St. Peter's	Dartmouth	Adult Spiritual Formation	\$1,000
		LGBTQ Ministry	\$2,000
Holy Spirit	Fall River	Carnival/Family Fun Day	\$2,600
		St. Nicholas Day Breakfast	\$1,400
St. Luke's	Fall River	Urban Youth Education/Empowerment Program	\$13,050
Grace	New Bedford	Community Breakfast Program	\$5,000
		Laundry Love	\$1,000
St. Andrew's	New Bedford	Spirit of Grace for All, Ecumenical Ministry	\$8,430
		Out-of-School Program	\$16,200
St. Martin's	New Bedford	Blessing Bag Ministry	\$800
		Children's Outreach Ministry	\$4,000
		Senior Lunch Ministry	\$3,000
Grace	North Attleborough	Year of the Children	\$6,500
Bristol Trinity	North Easton	Kids Care Program--Food Packaging Event	\$5,000
		Taunton Area Community Table	\$9,000
Our Saviour	Somerset	Annelle Delorme-Hagerman Food Pantry	\$2,875
Christ Church	Swansea	Campers to Christ	\$11,800
		Village Fellowship	\$7,000
<b>Total</b>			<b>\$92,855</b>

**Request to Repurpose Prior-Year Grant**

St. Peter's	Dartmouth	Children's Bereavement Program	\$6,000
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**Clergy Children College Scholarships**

*See 2019 Actual table in Resources for Clergy, CC1221, page 33. These grants are supported by a Bishop's Directed Fund, the Swansea Resthouse Fund, DIT 9000T.*

Scholarships awarded to 16 students **\$33,300**

### Congregational Development Open Grants

See 2019 Actual table in Grants to Congregations and Special Ministries, CC2011, page 30. These grants are supported by the Fund for Congregational Vitality, DIT 7004I.

Church	Town	Project	Amount
All Saints'	Attleboro	Boomers and Beyond	\$6,050
common cathedral	Boston	common cathedral/Ecclesia Ministries	\$5,380
Emmanuel	Boston	Food Ministry	\$7,000
St. Stephen's	Boston	B-CONN Program: Building Connections with Our Neighbors and New Members	\$4,195
St. James's	Cambridge	Invitation to the Community	\$6,000
St. Mary's	Dorchester	Ritmo y Tambores: Discovering, Embracing and Sharing Our Pan Caribbean Roots	\$7,000
St. Dunstan's	Dover	Community Awareness and Engagement	\$6,050
St. John's	Franklin	Seed Funding for Church School Director	\$6,000
St. Michael's	Holliston	New Street Signage	\$6,000
Grace	Lawrence	Two-Generation Model	\$4,600
St. Anne's	Lowell	Youth Alive	\$5,000
St. John's	Lowell	KALEIDOSCOPE	\$2,300
St. Stephen's	Lynn	Reaching Out to the Latino Community	\$4,500
Advent	Medfield	Improving Accessibility	\$6,000
St. Anne's	North Billerica	Marketing to the Community + Where Do I Fit In	\$5,000
Trinity	Shirley	Creation of New Website	\$4,150
Our Saviour	Somerset	South Coast Youth Group & Multiparish Retreat	\$7,230
St. Mark's	Southborough	Welcoming Task Group	\$3,795
Emmanuel	West Roxbury	From Maintenance to Mission	\$2,500
St. Peter's	Weston	Growth Initiative-New Playground Project	\$6,000
Messiah	Woods Hole	Audio-Visual Equipment to Support Congregational Connections	\$6,000
<b>Total</b>			<b>\$110,750</b>

### Congregational Development Targeted Grants

See 2019 Actual table in Grants to Congregations and Special Ministries, CC2012, page 30. These grants are supported by the Fund for Congregational Vitality, DIT 7004I.

Church	Town	Project	Amount
Lower Merrimack Valley Collaborative		Lower Merrimack Valley Collaborative	\$10,500
St. Paul's	Bedford	Sanctuary Lighting Improvement + Greening	\$4,000
St. James's	Cambridge	Communicating to Congregation and Community	\$3,500
Grace	Brockton	Youth Program Staff Support	\$10,000
St. Peter's	Dartmouth	Campus Ministry Outreach UMASS-Dartmouth	\$5,000
St. John's	Franklin	Mind/Body/Spirit	\$9,945
<b>Total</b>			<b>\$42,945</b>

### Continuing Education Grants

See 2019 Actual table in Resources for Clergy, CC1212, page 33. These grants are supported by various Bishop's Directed Funds.

Clergyperson	Congregation	Program	Amount
Jack Clark	St. John the Evangelist, Hingham	The Gathering	\$500
Karen Coleman	Boston University	Radical Listening Program	\$500
Isaac Everett	CRECHE	Missional Leadership Discernment Event	\$500
Bob Greiner	Emmanuel, Boston	Triennial of Association of Episcopal Deacons	\$500

*Continuing Education Grants continued on next page*

*Continuing Education Grants continued from previous page*

<b>Clergyperson</b>	<b>Congregation</b>	<b>Program</b>	<b>Amount</b>
Shannon Kelly		Research trip to Scotland	\$485
Phil LaBelle	St. Mark's, South-borough	Renewal in the Wilderness Pariah Canyon Backpacking Trip	\$500
Bruce Lomas		CREDO	\$250
Jeff Mello	St. Paul's, Brookline	Gathering of Leaders	\$495
Kelly O'Connell	Diocesan Staff	Women Touched by Grace	\$500
Sarah Robbins-Cole	St. Michael's, Holliston	Rooted in Jesus Conference	\$500
Moses Sowale	Grace, Brockton	Champions Club	\$500
Ellie Terry	Old North, Boston	Appreciative Transitional Ministry & Congregational Development	\$500
Stephen Voysey	Emmanuel, West Roxbury	2019 Henderson Summer Leadership Conference	\$450
<b>Total</b>			<b>\$6,180</b>

**Hispanic Ministries Grants**

*See 2019 Actual table in Grants to Congregations and Special Ministries, CC2031, page 30.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
San Lucas	Chelsea	Spanish and Bilingual Music Program	\$5,000
St. Mary's	Dorchester	Música Viva y Formación	\$5,000
Grace	Lawrence	Music Program	\$5,000
St. Anne's	Lowell	Hispanic Music Program	\$5,000
San Pedro	Salem	Latino Music Program	\$5,000
<b>Total</b>			<b>\$25,000</b>

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

*See 2019 Actual table in Grants to Congregations and Special Ministries, CC2022, page 30. These grants are supported by the House of Mercy Fund, DIT 7002Y.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
<b><i>Alewife</i></b>			
St. Paul's	Bedford	Funding for a Monitrice as part of Children's Nutrition Project in Haiti	\$1,099
Christ Church	Waltham	Diaper Depot	\$1,200
<b><i>Boston Harbor</i></b>			
Emmanuel	Boston	Boston Warm@Emmanuel Day Shelter	\$639
St. Stephen's	Boston	Parent Engagement & Leadership Development Program	\$2,660
<b><i>Charles River</i></b>			
Christ Church	Needham	Circle of Hope Welcome Baby Program	\$1,474.50
Grace	Newton	Newton-Brookline Asylum Resettlement Committee	\$1,824.50
<b><i>Concord River</i></b>			
ProGente	Framingham	Teacher Credentialing Coaching & College Mentoring	\$639
<b><i>Merrimack Valley</i></b>			
St. Anne's	Lowell	Youth Alive	\$1,508
St. John's	Lowell	KALEIDOSCOPE	\$482
St. Andrew's	Methuen	Community Garden for Methuen Arlington Neighborhood	\$337
<b><i>Mt. Hope-Buzzards Bay</i></b>			
St. Andrew's	New Bedford	Sunday School for children with special needs and their friends	\$3,299

*House of Mercy Grants continued on next page*

*House of Mercy Grants continued from previous page*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
<b>Neponset River</b>			
Advent	Medfield	Small appliances to benefit families emerging from homelessness seeking assistance from New Life Furniture Bank of MA	\$2,625
<b>North Shore</b>			
St. Stephen's	Lynn	Women in Motion-Serving and Seeking	\$1,969
St. Mary's	Rockport	Young Adult Service Corps Mission Program	\$1,330
<b>South Shore</b>			
Grace	Brockton	Brockton Boys' & Girls' Brigade Scholarship Program	\$3,000
<b>Taunton River</b>			
All Saints'	Attleboro	One Family, A Mission of Unity	\$1,460
Trinity	Wrentham	Assistance and Support of Vulnerable Women and Children in Local Area	\$1,200
<b>Total</b>			<b>\$26,746</b>

**Mission Tithe Matching Grants**

*Mission Tithe Matching Grants are funded through funds remaining from the Together Now campaign, recently set aside as a global partnerships endowment.*

<b>Church</b>	<b>Town</b>	<b>Pilgrimage/Mission Partner Location</b>	<b>Amount</b>
St. John's	Arlington	Hogar de niños Fátima; Guatemala Aid Fund	\$9,810
St. Stephen's	Boston	El Hogar, Tegucigalpa, Honduras	\$10,000
St. Paul's	Dedham	Diocese of St. Andrew's, Scotland	\$10,000
<b>Total</b>			<b>\$29,810</b>

**Sabbatical Funds**

*See 2019 Actual table in Resources for Clergy, CC1211, page 33. These grants are supported by the Diocesan Advance Fund Bishop Nash Fund, DIT 7002M, and various Bishop's Directed Funds.*

<b>Church</b>	<b>Town</b>	<b>Clergyperson</b>	<b>Amount</b>
All Saints North Shore	Danvers	Marya DeCarlen	\$6,500
St. Mary's	Dorchester	Edwin Johnson	\$6,500
St. Luke's	Hudson	T. James Kodera	\$6,500
Our Saviour	Middleborough	David R. Milam	\$6,500
<b>Total</b>			<b>\$26,000</b>

**Sending Serving Grants (by deanery)**

*See 2019 Actual table in Grants to Congregations and Special Ministries, CC2021, page 30.*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
<b>Alewife</b>			
St. John's	Arlington	Neighbors Eating All Together (NEAT) Community Dinners	\$600
St. Paul's	Bedford	Outreach to Bedford Veterans	\$500
St. Mark's	Burlington	Pumpkin Patch	\$500
St. James's	Cambridge	Helping Hand Food Pantry	\$1,425
Christ Church	Waltham	Grandma's Pantry	\$850
<b>Boston Harbor</b>			
Emmanuel	Boston	Boston Warm@Emmanuel Day Shelter	\$3,430.50
St. Stephen's	Boston	Teen Leadership Development and Community Organizing	\$2,069.50
<b>Cape and Islands</b>			
St. David's	South Yarmouth	Paper Pantry	\$1,500

*Sending Serving Grants continued on next page*

<b>Church</b>	<b>Town</b>	<b>Project</b>	<b>Amount</b>
<b>Charles River</b>			
St. Andrew's	Wellesley	Appalachia Service Project Summer Mission Trip	\$3,500
<b>Concord River</b>			
ProGente	Framingham	Teacher Credentialing Coaching & College Mentoring	\$1,500
St. Michael's	Holliston	Youth Mission Trip	\$4,000
<b>Merrimack Valley</b>			
St. John's	Lowell	KALEIDOSCOPE	\$1,625
St. Andrew's	Methuen	St. John's Nghumbi (Tanzania) Children's Library Ministry	\$475
St. Paul's	Newburyport	Food Voucher Program	\$900
St. Mark's	Westford	Living with Dementia	\$1,000
<b>Neponset River</b>			
St. Paul's	Dedham	Fundraising for Baby Basics, Inc.	\$1,500
Emmanuel	West Roxbury	Action for Boston Community Development; Home for Little Wanderers	\$1,000
<b>North Shore</b>			
North Shore Deanery		Liberating Ourselves from Racism Training	\$1,633.34
St. Peter's	Beverly	St. Peter's Outreach Meals	\$1,933.33
St. Stephen's	Lynn	Summer Learning at St. Stephen's	\$1,933.33
<b>South Shore</b>			
Grace	Brockton	Brockton Boys' & Girls' Brigade Lunch Program	\$2,000
<b>Taunton River</b>			
All Saints'	Attleboro	One Family, A Mission of Unity	\$2,000
Trinity	Wrentham	The #2069 Project Transition Box Ministry	\$2,000
<b>Total</b>			<b>\$37,875</b>

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

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

Served 41 clergy **\$109,963**

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

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

Served 36 survivors **\$65,600**

**Special Needs Ministries Grants**

*See 2019 Actual table in Grants to Congregations and Special Ministries, CC2015, page 30. These grants are supported by the Deaf Ministry Endowment, DIT 7004H.*

**No grants made in 2019**

**Sustainable Development Grants**

*See 2019 Actual table in Support for the Wider Church, CC3511, page 28. These grants are supported by an allocation of 0.7% of unrestricted diocesan income in response to the UN Sustainable Development Goals for grants to partners in developing nations.*

<b>Church</b>	<b>Town</b>	<b>Mission Partner Location</b>	<b>Amount</b>
St. Andrew's	Methuen	St. John's Church, Engineers Without Borders, Diocese of Mpwapwa, Nghumbi, Tanzania	\$10,000
St. Paul's	Bedford	Faculté des Sciences de Réhabilitation, Léogâne, Haiti	\$10,000
St. Dunstan's	Dover	Holy Innocents Episcopal School, Labegue, Haiti	\$10,000
Epiphany	Winchester	Princess Basma Center for Disabled Children, American Friends of the Diocese of Jerusalem	\$8,768
		Hôpital Ste. Croix, Léogâne, Haiti	\$8,768
<b>Total</b>			<b>\$47,536</b>

## **APPENDIX E: TOGETHER NOW CAMPAIGN**

The Together Now campaign, launched in 2011, has largely come to a close. There are a small number of parishes that are still collecting pledges, and the diocese continues to support those efforts. We celebrate that nearly 4,000 pledges totaling \$32 million were received for congregations, projects and programs throughout the diocese.

We estimate that approximately \$90,000 in pledges will be paid in 2020 and 2021. Disbursements to congregations will continue as warranted by pledge payments. The use of Together Now funds has not changed. A full accounting of the Together Now campaign will be available when collections are complete.



## **APPENDIX F: DIOCESAN STAFF**

(listed by area, as of September 2020)

### ***Resources for Congregations***

<i>Ordained Vocations</i>	Edie Dolnikowski, Canon for Ordained Vocations Patricia Zifcak, Assistant for Ordained Vocations ( <i>part-time</i> )
<i>Regional Canons</i>	Carol J. Gallagher, Regional Canon, Central Region Martha L. Hubbard, Regional Canon, Northern & Western Region Kelly A. O'Connell, Regional Canon, Southern Region Jennifer Garrett, Assistant for Congregational Resources & Events
<i>Networking &amp; Formation</i>	Martha S. Gardner, Missioner for Networking and Formation
<i>Multicultural Ministries</i>	Jean Baptiste Ntagengwa, Canon for Immigration and Multicultural Ministries
<i>Youth &amp; Young Adults</i>	H. Mark Smith, Missioner for Youth and Young Adult Ministries
<i>Communications</i>	Tracy J. Sukraw, Director of Communications Bridget K. Wood, Communications Assistant
<i>Records &amp; Societies</i>	Suzette Phillips, Assistant for Clergy Records and Retired Clergy & Survivors ( <i>part-time</i> )

### ***Episcopate and Governance***

<i>Bishop Diocesan</i>	Alan M. Gates, Bishop Diocesan Laura Simons, Executive Assistant to the Bishop Diocesan
<i>Bishop Suffragan</i>	Gayle E. Harris, Bishop Suffragan David Ames, Executive Assistant to the Bishop Suffragan
<i>Canon to the Ordinary</i>	William C. Parnell, Canon to the Ordinary Chelsea Smith, Assistant for Governance and Administration
<i>Development</i>	Bliss Austin Spooner, Director of Development

### ***Facilities and Administration***

<i>Finance</i>	<i>Vacant</i> , Chief Financial Officer Tom Hamel, Controller Marilyn Govoni, Senior Accountant <i>Vacant</i> , Accountant
<i>Human Resources</i>	Nathaniel Fasman, Payroll and Benefits Manager
<i>Property Stewardship</i>	Edward M. Cardoza, Missioner for Property Stewardship
<i>Remote Facilities</i>	Jaime Perez, Sexton
<i>Archives</i>	<i>Vacant</i> , Archivist

### ***Mission Initiatives Employees***

<i>Life Together</i>	Kelsey Rice Bogdan, Executive Director
<i>Aided Congregations</i>	Lily Leung, Administrative Assistant, Boston Chinese Ministry
<i>Chaplaincies</i>	Megan Holding, Chaplain, Northeastern University & Boston College Thea Keith-Lucas, Chaplain, MIT

### ***Non-Stipendiary Program Coordinators***

<i>Deacons</i>	Christiaan A. Beukman, Archdeacon Patricia Zifcak, Archdeacon
<i>Elder Care</i>	Phillip Flaherty, Missioner for Ministry with Older Adults Marilee Comerford, RN, Assistant Missioner for Ministry with Older Adults
<i>Global Partnerships</i>	Holly Hartman, Deacon for Global Mission Marilyn McMillan, Deacon for Global Mission



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