

*The Episcopal Diocese of Massachusetts*

**JOURNAL OF CONVENTION**  
**2014**



*Answering God's urgent call*  
**TOGETHER**

*Minutes and Papers of the Special Electing Convention  
And the Annual Diocesan Convention*

*Reports of Committees, Staff and  
Related Organizations*

**THE EPISCOPAL DIOCESE  
OF MASSACHUSETTS**

**2014 DIOCESAN JOURNAL**

**of the**

**SPECIAL CONVENTION TO ELECT A BISHOP DIOCESAN  
APRIL 5, 2014**

**and the**

**TWO HUNDRED TWENTY-NINTH ANNUAL SESSION  
OF THE DIOCESAN CONVENTION  
NOVEMBER 8, 2014**

MINUTES AND PAPERS OF THE CONVENTIONS

REPORTS OF COMMITTEES,  
STAFF AND RELATED ORGANIZATIONS

RECORD OF EPISCOPAL ACTS AND CLERGY RECORD

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## **NOTICE OF THE NEXT SESSION OF THE CONVENTION**

The two hundred thirtieth Annual Session of the Convention of the Episcopal Diocese of Massachusetts will be held on Friday, November 13, 2015 and Saturday, November 14, 2015, in Boston, Massachusetts, at a time to be announced in the Canonical Notice which will be mailed to each member, clerical and lay, in October 2015.

Leon A. Brathwaite II  
Secretary

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Alphabetical by Last Name

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# LIST OF PARISHES, CONGREGATIONS, CHAPELS AND MISSIONS

## I.

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

## II.

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

*Parishes in italics were closed in 2014 (or before)*

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

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

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

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

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

NOTE: The BRISTOL CLUSTER comprises St. Mark's Church, North Easton; The Church of St. John the Evangelist, Mansfield; and St. John's Church, Taunton

NOTE: Calvary, Danvers and St. Paul's, Peabody merged in 2013 to create All Saints' Episcopal Church of the North Shore, Danvers

## III.

## MISSION CHURCHES IN UNION WITH THE CONVENTION

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

## IV.

CONGREGATIONS, CHAPELS AND MISSIONS WITH  
DATES OF ORGANIZATION

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

## Clergy Canonically Resident and Eligible for Seat and Vote in Convention

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

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



Patrick	S.	Cheng	
Kendrick	H.	Child	
Sharon	L.	Ciccarelli	
Scott	A.	Ciosek	
Bradford		Clark	
Jacqueline		Clark	
Judith	F.	Clark	
Richard	T.	Clark	
John	R.	Clarke	
Thomas	G.	Cleveland	
Ann	S.	Coburn	
Suzanne	F.	Colburn	
Theodore		Cole	Jr.
Karen		Coleman	
Jeremi	A.	Colvin	
Louise	R.	Conant	
John	H.	Conn	
Walter	J.	Connelly	Jr.
Sarah	Amy	Conner	
Joseph	M.	Constant	Jr.
Michael		Corrigan	
Gay	P.	Cox	
Roger	Weldon	Cramer	
John	D.	Crandall	
Marcus	T.	Crapsey	II
Malia		Crawford	
Timothy	E.	Crellin	
Kate		Cress	
Margot		Critchfield	
Daniel	F.	Crowley	
Joao	A.A.	d'Alcaravela	
Alexander	S.	Daley	
Jennifer	Grumhaus	Daly	
Michael	B.	Dangelo	
Rainey		Dankel	
Charles	Laskin	David	
E. Gale		Davis	
Judith	A.	Davis	
Robert	C.	Day	
John		de Beer	
Patricia	J.	de Beer	
Chitral	S.	de Mel	
Marya	L.	DeCarlen	

Laurel	P.	Deery	
E. Robert		Dickson	Jr.
Jeffrey	A.	Dodge	
Edith	W.	Dolnikowski	
Mary Jane		Donohue	
Richard	H.	Downes	
Donald	M.	Dunbar	
Julia		Dunbar	
Marc	G.	Eames	
Richard	F.	Ebens	
Malcolm	D.	Eckel	
William	W.	Eddy	
Jonathan	T.	Eden	
Mark	D.W.	Edington	
Robert	D.	Edmunds	
Robert	B.	Edson	
Katherine	B.	Ekrem	
C. Clyde		Elledge	II
Kathryn	N.	Elledge	
jimichael		Engels	
Gareth	C.	Evans	
Katharine	C.	Evans	
Noah	H.	Evans	
Norman	J.	Faramelli	
Manuel	P.	Faria	III
John	A.	Fesq	
Heidi	A.	Fieldston	
Christopher	J.	Fike	
John	H.	Finley	IV
Paige	F.	Fisher	
Sue		Fisher Seeger	
Jessica		Flaherty	
Alden	B.	Flanders	
Francis		Fornaro	
E. Louise		Forrest	
Lisa	R.	Fortuna	
Virgilio		Fortuna	BSG
Dwight	C.	Fortune	
Pamela	L.	Foster	
Anne	C.	Fowler	
L. Nelson		Foxx	
Ann	H.	Franklin	
Julian	K.	Fredie	Jr.

David	A.	Fredrickson
Warren	G.	Freeman
Stephen	A.	Fregeau
Christen	S.	Frothingham
Harold	W.	Garbarino
Anne	E.	Gardner
G. Kenneth		Garrett
Alan	M.	Gates
Judith	S.	Gay
Susan	L.	Geissler-O'Neil
Miriam	C.	Gelfer
Maggie		Geller
Cathy	H.	George
Rebecca	B.	Gettel
Elizabeth		Gibson
James	K.	Githitu
Charles	L.	Glenn
Patricia	D.	Gober
Wallace	G.	Gober
Michael	J.	Godderz
Andrew		Goldhor
Mary	M.	Gonzalez
Elizabeth		Good
Billie Mae		Gordon
Martin	J.	Goshgarian
Jane	S.	Gould
Eleanore	L.	Gowen
Colin	B.	Gracey
Patrick	T.	Gray
Gretchen		Grimshaw
Elizabeth	Anne	Grundy
Margaret	B.	Gunness
Edgar		Gutierrez-Duarte
Douglas		Hale
Addison	C.	Hall
Lisbeth	J.	Hall
Lyle	G.	Hall
W. Michael		Hamilton
Robert	L.	Hammett
Patricia		Handloss
Kim	E.	Hardy
Stanley	P.	Hardy
Catherine	A.	Harper

Barbara	C.	Harris	
Gayle	Elizabeth	Harris	
Merritt	R.	Harrison	
Holly		Hartman	
Michael		Hartwell	
Cornelius		Hastie	
Bret	B.	Hays	
Charles	C.	Hefling	
Scott	H.	Helferty	
Alan	R.	Hesse	
William	B.	Heuss	
Carter		Heyward	
Eric	M.	Hillegas	
Edward	H.C.	Ho	
Michael	J.	Hodges	
Marsha	H.	Hoecker	
Therese		Hofmann	
Megan		Holding	
David	L.	Holt	
Daniel	E.	Horgan	
		Hornberger-	
Sharon		Brown	
James	H.	Hornsby	
Alanson	B.	Houghton	II
Marguerite	A.	Howell	
Cynthia	P.	Hubbard	
Martha	L.	Hubbard	
Jennifer	S.	Hughes	
E. Bradlee		Hultman	
Donald	A.	Hunt	
Marshall	W.	Hunt	
Victoria	Wells	Hunt	
Carl	P.	Ijams	
Sara	H.	Irwin	
Donald	T.	Isaac	
Joel	M.	Ives	
Robert	S.	Jackson	
Philip	C.	Jacobs	III
Donald	W.	Jaikes	
F. Washington		Jarvis	
Peter	L.	Jeffrey	
Philip	E.	Jerauld	
Edwin	D.	Johnson	

Joan	Cotrell	Johnson	
Kenneth	W.	Johnson	
David	K.	Johnston	
Kenneth	L.	Jones	
Rosanna	Case	Kazanjian	
Victor	H.	Kazanjian	
Diane Dorothea		Keith-Lucas	
Sarah	D.	Kelb	
Brian	S.	Kelley	
Maureen	Dallison	Kemeza	
Thomas	B.	Kennedy	
Margery		Kennelly	
Edward	C.	Kienzle	
David	A.	Killian	
Allan	B.	King	Jr.
Benjamin	J.	King	
Elise		Kinney	
Hall		Kirkham	
James	C.	Knudson	
T. James		Kodera	
William	M.	Kondrath	
Beulah	C.	Koulouris	
Armand		Kreft	
Matthew	C.	Kruger	
Judith	S.	Krumme	
Philip	J.	Kuhn	
Philip	N.	LaBelle	
James	R.	LaMacchia	
Robert	D.	Landreth	
Gerard	M.	Lawrence	
Susan		Lederhouse	
Susan	H.	Lee	
Kenrick		Lewis	
Adam	S.	Linton	
Deborah	W.	Little Wyman	
Dorothella		Littlepage	
Mally	Ewing	Lloyd	
Samuel	T.	Lloyd	III
Samuel	T.	Lloyd	III
Bruce	A.	Lomas	
Kathleen	G.	Lonergan	
Richard	T.	Loring	
Raymond	A.	Low	

Denzil	J.	Luckritz	
Daniel	K.	MacDonald	
Robert	A.	Mackie	
Katherine	M.	Malin	
Alice	B.	Mann	
Louise		Mann	
Michael	J.	Marrone	
Elizabeth		Marsh	
Robert	K.	Massie	
Ranjit	K.	Mathews	
Kathleen	A.	McAdams	
James	P.	McAlpine	
Terry	A.	McCall	
Amy		McCreath	
A. Homer		McCue	
Robert	B.	McFarlane	
Jacqueline		McGrady	
Brian	W.	McGurk	
Devin		McLachlan	
John	N.	McLaughlin	
Michael	P.	Melendez	
Jeffrey	W.	Mello	
William	G.	Messenger	
Wendel	W.	Meyer	
David	R.	Milam	
Nancy	Elizabeth	Milholland	
Todd	L.	Miller	
Donald	A.	Milligan	
Christen	H.	Mills	
Lorraine	M.	Mills-Curran	
Cheryl	V.	Minor	
Paul	L.	Minor	
Anne	M.	Minton	
Karen	Brown	Montagno	
Eduardo		Monzon	
Christopher	R.	Morck	
Nicholas	M.	Morris-Kliment	
Jerry	D.	Morrow	
Frederick	P.	Moser	
Roger	C.	Moulton	
Thomas	N.	Mousin	
Thomas	P.	Mulvey	Jr.
Brian	J.P.	Murdoch	

Rebecca	M.	Murphree	
James	L.	Nelson	
Roger	E.	Nelson	
Jay	L.	Newberry	
Connie Miu Sheung		Ng Lam	
Bruce	E.	Nickerson	
Daphne	Bess	Noyes	
Jean	Baptiste	Ntagengwa	
Audrey	L.	O'Brien	
Kevin	O.	Olds	
Robert	E.	Outman-Conant	
W. Russell		Page	Jr.
Eleanor	J.	Panasevich	
Pui-kong	Thomas	Pang	
Terry	R.	Pannell	
Cynthia	D.	Pape	
Scott	I.	Paradise	
Barbara	D.	Parini	
Donald	H.	Parker	
Roy	E.	Parker	OHC
Charles	F.	Parthum	III
Cameron	E.	Partridge	
Richard	L.	Payne	
Edwin	C.	Pease	
Eldridge		Pendleton	SSJE
Catherine	Louise	Perkins	SSM
Barbara	Ann	Peterson	
Rachael		Pettengill-Rasure	
Deborah	A.	Phillips	
Kathryn	Ann	Piccard	
Joseph	T.	Pinho	
Geoffrey	T.	Piper	
Louis	W.	Pitt	Jr.
Wanda		Pizzonia	
John Michael		Povey	
Rita		Powell	
Sharon	K.	Powers	
David		Prentice	
Phyllis	A.	Price	
Warren	R.	Radtke	
S. Lester		Ralph	
Ronald	E.	Ramsey	

Sarah	A.	Randall	SSM
Cristina		Rathbone	
Brian		Rebholtz	
Nathaniel	T.	Reece	
Jennifer	B.	Reiley	
Maria	Regina	Retamal	
William	W.	Rich	
Susan	O.	Richmond	
Linda	H.	Ricketts	
Kathleen	Pakos	Rimer	
Adrian		Robbins-Cole	
Sarah		Robbins-Cole	
Joseph	O.	Robinson	
Paul	B.	Rodgers	
Edward	W.	Rodman	
Samuel	S.	Rodman	
Michael	J.	Roeske	
Laurie	Ann	Rofinot	
Timothy	James	Rogers	
Suzan	J.	Rolfe-Boutwell	
Silvestre	E.	Romero	
Ema		Rosero-Nordalm	
Carlton	T.	Russell	
Adele Marie		Ryan	SSM
Noble		Scheepers	
Timothy	E.	Schenck	
Joyce	L.	Scherer-Hoock	
Joyce	M.	Scheyer	
Kenneth		Schmidt	
William	J.	Schneider	
Robert	Hughes	Schoeck	
Susan	M.B.	Schwab	
Margaret	K.	Schwarzer	
Paul	M.	Schwenzfeier	
Vincent		Seadale	
Albert	N.	Sears	III
Nancy	H.	Shepherd	
Thomas	C.	Shepherd	
Robert	L.	Sherwood	
Michael	O.	Shirley	
David	J.	Siegenthaler	
Richard	S.	Signore	
Richard	J.	Simeone	



John	E.	Simson	
Herbert	C.	Skelly	
Claude	A.	Smith	
Gail	S.	Smith	
H. Mark		Smith	
John	F.	Smith	
Nancy	S.	Smith	
Stephen	V.	Smith	
Barbara	P.	Smith-Moran	
Susanna	J.	Snyder	
Tara	K.	Soughers	
Adrian		Stair	
Elizabeth		Steinhauser	
Leslie	K.	Sterling	
Matthew	W.	Stewart	
Andrew	J.	Stoessel	
Barbara	E.	Stowe	
Jon	C.	Strand	
John	P.	Streit	Jr.
Judith	L.	Stuart	
David	P.	Sullivan	
Maryalice		Sullivan	
Meghan	T.	Sweeney	
Mark	A.	Templeman	
Evan	L.	Thayer	
John	H.	Thomas	
Owen	C.	Thomas	
Ronald	Creighton	Tibbetts	
Robert	W.	Tobin	
Paula	J.	Toland	
Michele	A.	Torres	
John	T.	Townsend	
Stephen	C.	Trever	
Roy		Tripp	
Geoffrey	R.	Tristram	SSJE
David	B.	Van Dusen	
Sarah	A.	van Gulden	
Stephen	O.	Voysey	
David	B.	Vryhof	SSJE
Karin	E.	Wade	
Suzanne	B.	Wade	
Mary Scott		Wagner	
Elsa	Ph.	Walberg	

Janice		Walden	
Harry	E.	Walton	
Regina Laba		Walton	
Sze-kar		Wan	
Patrick	C.	Ward	
Deborah	M.	Warner	
Allan	B.	Warren	III
Russell		Way	
James	M.	Weiss	
G. Truman		Welch	
George	H.	Welles	Jr.
Christopher		Wendell	
Peter	W.	Wenner	
Pamela	L.	Wertz	
George	A.	Westerberg	
Elizabeth		Wheatley-Dyson	
James	S.	Whitaker	
Bailey	O.	Whitbeck	
Elizabeth		Whitmore	
Christine	R.	Whittaker	
Joseph	W.	Wilkes	
Monrelle	T.	Williams	
Sandra		Williams	
Barbara	S.	Williamson	
Donald	R.	Wilson	
Robert	G.	Windsor	
Diane		Wong	
Gloria	L.	Wong	
Colette	Bachand	Wood	
Priscilla		Wood	
Sammy	L.	Wood	
J.C.		Woods	Jr.
James	Christopher	Woods	
Deborah	M.	Woodward	
Bruce	A.	Young	
Herbert	B.	Zalneraitis	
Luther		Zeigler	
Patricia		Zifcak	

*Bishop's Annual Address  
Convention of the Diocese of Massachusetts  
Saturday, November 8, 2014  
St. Stephen's Memorial Church, Lynn*

***Returning to a Changed Landscape***

On a visit to Ephesus a few years ago I was taken by the eager local guide to a grotto known as The Cave of the Seven Sleepers. According to the tale, a group of 3<sup>rd</sup> century Christians was swept up in the persecution under the Roman emperor Decius. The seven young men hide in a cave outside of Ephesus. After what they think is a long night's sleep, they wake up 180 years later, in the reign of the Christian emperor Theodosius II. Not realizing that all has changed, they send one of their number into town to buy some food. He is astonished to see churches and crosses everywhere. The townspeople are equally surprised when the man tries to buy bread with 180-year-old coins. Of course, soon the great miracle is understood, a great celebration is held, and – according to the hagiography, “the sleepers, having improved the occasion by a long discourse, then die praising God!” [www.newadvent.org]

I enjoyed visiting the grotto in Ephesus, and hearing the tale – which is thought to have been the inspiration for Washington Irving's more familiar story of Rip van Winkle. But it was not until this past summer that my wife Tricia and I began to feel that we might ourselves be latter-day members of The Seven Sleepers! Returning to Boston after an absence of 24 years, the landscape has been both familiar and not.

The Central Artery has disappeared! The Rose Kennedy Greenway is beautiful. Briarwood and Camp Dennen are gone. The Barbara C. Harris Camp & Conference Center is splendid. Battleship Cove still anchors the south coast; the Hammond Castle stands sentinel to the north. But the Hilltop Steak House sits silent and shuttered next to its landmark cactus. And – woe is us! – Bailey's Ice Cream Parlors are no more.

Such landmark changes are mirrored even more significantly by changes in the life of the church. Some of those changes represent deep and ongoing challenges. Attendance in many churches has declined; some have closed. The church as a whole does not have the presumed worth in the life of our communities that was still presumed in many places even a generation ago. But I must tell you that the life of the Diocese of Massachusetts is in many ways dramatically more healthy, more vibrant, and more mission-oriented than I experienced it to be twenty-five years ago. An on-again off-again moratorium on ordinations in those days, reacting to a perceived “clergy glut”, has now been replaced by a deep and energetic culture of call for church leadership, including a revitalized diaconate. Twenty-five years ago the clericus, despite very strong and faithful priests, was persistently derailed by fractious division. Now it feels broadly collegial, upholding differences as manifestation of Pauline complementarity. And our parishes, which too often yield to the surrounding culture of isolated congregational identity, are now engaged in far more collaborative ministries.

From the perspective of one who was ordained here, has been gone, and has now returned, I am eager to say that the Diocese of Massachusetts – for all our many challenges – is a place where Christian fellowship is evident, and the movement of the Holy Spirit is palpable. Thanks be to God.

***Big Shoes and New Shoes***

Here I would pause to pay homage to Bishop Tom Shaw. The positive changes which I have described in health, tone, and spirit in the Diocese of Massachusetts are, of course, the work of the Holy Spirit. But they cannot be separated from the leadership of Tom Shaw as an agent of that Spirit. He

may not actually have been, as we hear he once claimed, “the monk of the month.” But here he was the ‘diocesan of the double-decade,’ and the church was blessed.

A week ago we commended Tom to his Maker, with gratitude and with the sure and certain hope of eternal life. Last week’s liturgy was marked by a simple grandeur which expressed that hope. We offer our sincere thanks to the brothers of the Society of St. John the Evangelist, to its Superior, Brother Geoffrey Tristram, and to the people of Trinity Church, for the gift which that liturgy was to all of us.

Tom and I had both hoped to have a period for mentoring and companionship in this season of episcopal transition. That was not to be. Many people have told me that I have very large shoes to fill. True – except that I cannot fill Tom’s shoes, and I will not try. He wore his shoes. I must wear my own, and I rely on God’s grace to determine the style of those shoes and to provide the ‘sole.’

A number of people have also commented on a certain parallel in the way that Tom’s episcopate and mine have begun. It is true that in both cases we have begun our tenure at an accelerated pace, and with the death of our predecessor. But this, truly, is where the similarity begins and ends. I am very clear, and I want you to recollect clearly as well, that the circumstances which we now face as a diocese are altogether different than those in which Bishop Tom Shaw (with Bishop Barbara Harris alongside him) was required to shepherd us twenty years ago. We move forward now from a time of sorrow and regret, to be sure, but our sorrow is born not out of betrayal, but out of thanksgiving. Last week we proclaimed Tom’s resurrection in Christ, and we prayed that he go from strength to strength. This week we assert that our diocese is poised, in its own continuing life in Christ, to go from strength to strength. Thanks be to God.

### *Listening While We Work*

So, here we are together for the third time in two months. We have had a consecration. We have had a funeral. Now we have a convention, in which we are invited to hold one another gently as we face forward with gratitude and hope. This convention will not be an occasion for the unveiling of dramatic changes, nor the outlining of new vision. I have said repeatedly, before last spring’s election and since, that I would understand my task for this first year to be that of historian and companion. I intend to spend as much time as we need together to hear the history – old stories and recent ones; for us to get to know one another and our mutual passions and yearnings. That is precisely my agenda. And it is underway.

A mentor of mine, as new bishop in his diocese, once said to his people: “You will grow impatient with my patience.” Indeed, you might. But I am convinced that the God of lightning bolts and volcanic eruptions is also the God of the turtle, the lichen, and the fermentation of yeast. Dare I say it: the God of the Damascus Road is also the God of the Emmaus Road! And I am certain that we will encounter God together on such a road in the year ahead.

In this connection, I note that according to Canon [10.2.d], the Diocesan Council would be required in the coming months to prepare a triennial Diocesan Mission Strategy to guide next summer’s budget preparation for the following year. In light of my determination to spend this year engaged in a Listening Tour, I believe our new or revised mission strategies and budget priorities will best be shaped in the year thereafter. An official resolution to reflect that revised timing will be presented later today.

But make no mistake. That does not mean we will be treading water or sitting idle in the mean time. The four mission priorities already articulated are driving our life together. Indeed, I have already been hearing the passion behind those strategies in my visitations around the diocese.

We have identified God’s urgent call for vital and viable congregations – which are still the front line of ministry in our neighborhoods and communities around eastern Massachusetts.

We have identified God’s urgent call to care for God’s creation – a call to which more and more individuals and congregations are responding, and one which asserts itself with ever greater intensity.

We have identified God's urgent call to raise up new generations in faith and leadership. This is a call which does not diminish the wisdom of our elders, but rather depends upon it. I hope you know that the way that this diocese has already begun to form young leaders for the church has been watched, admired, and emulated around the country.

We have identified God's urgent call to join God's mission in the world, through partnerships local and global. Here, too, we have seen exciting new collaborations, even as we see news demanding our response – from last week's displacement of nearly 800 homeless persons from Boston's Long Island Shelter, to the appalling martyrdoms at churches in Pakistan and on village hillsides in Syria.

No doubt new mission priorities will emerge, but friends, we have no shortage of work to do on those to which we have already committed, and I am thrilled to be joining you in that work as it continues.

### *Desiring Different Discourse*

I want to say a word about one current concern which has arisen in my conversations around the diocese more often than any other single matter, and that is deep distress about controversy in our seminaries. From older clergy it has often been expressed as grief over what such conflict portends for the future of beloved alma maters. From younger leaders I have heard repeated expressions of confusion and even embarrassment, at what seems to be the confirming of their peers' generational distrust of religious institutions. How, they ask, are they to convince their peers that the church represents a different set of values in the face of events which, as reported, seem only to mirror secular institutions in their handling of power and conflict?

Like many of you, I have friends and people I respect on both sides of this conflict. It grieves the heart. The spiral of conflict at General Seminary has provided a stark cautionary tale for those of us concerned to see a positive path forward at EDS. EDS has no structural or administrative relationship with this diocese. However, as a grateful alumnus of EDS, and as the Bishop of a diocese which relies deeply and thankfully on EDS for the training of so many of its leaders, I urge all parties to embrace a spirit of forbearance and mutual respect. I offer my personal support, and that of the office of the Bishop of Massachusetts, in whatever ways might help to promote a constructive way forward.

Ten years ago, Episcopal Divinity School published a handbook for the conducting of dialogue in the midst of conflict. It was entitled "Good News: A Congregational Resource for Reconciliation." The Introduction articulated its purpose:

*[T]o promote a fair and respectful dialogue among persons who hold different opinions, to offer a context of reflection on the shared values of the gospel, and to encourage a process of reconciliation within the life of the community. ... Anything that would tend to subvert these goals by offering a return to familiar soapboxes should be avoided. [p. 7]*

This document provides principles which should guide us all. As a highlighted text box in the workbook put it: "In the end, when asked what was the most important thing for people to do, Jesus did not say that it was for them to be 'right.' He said it was for them to love." In our pursuit of the truth, it matters how we treat one another. It truly does.

Which brings me finally to today's Convention. This afternoon we will take up several resolutions, some of which touch upon matters of contention. The resolutions have been submitted with faithful conviction. I have no doubt they will be debated with equally faithful conviction. Let us begin with the assumption that everyone in this place wishes earnestly to do the right thing, even while disagreeing on the ways to that end. Let us model something different than the polarized and bitter invective of contemporary culture. Let us debate without impugning motive, disagree without demonizing. Let us display our conviction that it really does matter how we treat one another – for surely it does.

Have you seen the photo of a demonstrator at the nation's capitol? She holds a placard which reads: "WHAT DO WE WANT? Respectful discourse! WHEN DO WE WANT IT? Now would be agreeable to me. But I am interested in your opinion."

### *Is It Real?*

A week ago yesterday evening, Tricia and I boarded the T. It was Halloween. I was wearing my clericals. I sat down next to a young woman who stared at me long and hard and then said, "Is that real, or is it just a costume?"

I thought: "Funny. I've been wondering the same thing myself." Being your bishop is the most extraordinary responsibility. I am delighted to be your bishop. But I don't mind telling you, it takes a little getting used to! And it demands knowing that the get-up is real, and not just a costume. As I said to the cathedral congregation on the morning after the consecration, if the mitre were to be an expression of historical practice only, a pointing backward only and not forward – well then, it would be mere costumery and nostalgia, and scarcely worth the cost it took to make it.

No, there must be congruity: a connection between our peculiar symbols and the life we are striving to live in the world. The demand for such congruity – between word and deed, between costumery and actual leadership – is a burden which was placed quite literally on my head in September. God help me. But I am not alone in this challenge. For such congruity is equally the task of every Christian person. This is your task too. God help us all.

As your bishop I expect that you will hold me accountable for fulfilling the vows you heard me take. And I expect that as your bishop I am meant to hold you accountable in just the same way.

That welcome sign outside your church: Is it real, or is it just a prop?

That cross around your neck: Is it real, or is it just jewelry?

The faith which brought you here today: Is it real, or is it just a costume?

Individually and together, may we put on garments of praise and righteousness which are real – as real as the grace of God which is the only thing capable of equipping us to make it so.

I thank you, dear friends – for the sacredness of your trust, for the warmth of your welcome, for the depth of your prayers, and for the very great joy of your companionship.

*The Rt. Rev. Alan M. Gates  
Bishop XVI of Massachusetts*

**Minutes of the 229th Annual Convention  
of the Episcopal Diocese of Massachusetts  
November 8, 2014  
St. Stephen's Memorial Church, Lynn, MA**

**Opening Devotions**

The morning began at 8:30am with opening devotions led by Ms. Erica Clark.

**Call to Order**

The Rt. Rev. Alan M. Gates was seated as Chair and called the convention to order.

**Declaration of Constitutional Quorum**

Bishop Gates recognized Mr. Leon A. Brathwaite II, Secretary, and he declared a constitutional quorum present for the 229<sup>th</sup> Diocesan Convention.

**Invitation to Honorary Seats**

Bishop Gates recognized Mr. Patrick LaFortune, Chair of the Committee on Dispatch of Business, who moved:

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

The motion carried by majority voice vote.

**Invitation to Special Seats**

Mr. LaFortune moved:

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

The motion carried by majority voice vote.

**Permission to Speak**

Mr. LaFortune moved:

*That permission be given for the following to have seat and voice to address the convention: Ms. Suzette Phillips to give the Qualifications Committee report; Ms. Diane D'Souza and Ms. Katie Ernst to speak during the "Being Church" video and presentation; Mr. Eric Johansmeyer and other members of Bristol Trinity Episcopal Church, North Easton, to speak during the Bristol Trinity celebration; Mr. Jeff Tyrakowski to give the Compensation and Benefits report; Ms. Tinka Perry and Mr. Chad Brinkman to speak during the Episcopal Relief and Development Report.*

The motion carried by majority voice vote.

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

Mr. LaFortune then moved for approval the Special Rules of Order as follows:

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

Mr. Michael Pierce of Trinity Church in Canton spoke in opposition to the Special Rules of Order.

The motion carried by majority voice vote.

Mr. LaFortune then moved the Order of Business on pages H-3 and H-4 of the Handbook.

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

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

Bishop Gates recognized Mr. Leon Brathwaite, who moved by title the acceptance of these three reports, to be contained in the Journal of Convention 2014. The motion was seconded and carried by majority voice vote.

### **Report of the Qualifications Committee**

Bishop Gates recognized Ms. Suzette Phillips of the Qualifications Committee, who reported that there were no contested delegate seats. Bishop Gates declared the report accepted.

### **Greetings and Good Wishes**

Bishop Gates expressed greetings and good wishes to the Most Rev. Katharine Jefferts Schori, Presiding Bishop, and her husband, Dr. Richard Schori, and to the Rev. Gay Clark Jennings, President of the General Convention House of Deputies, and her husband, the Rev. Albert Jennings. He then recognized the retired Bishops Suffragan, the Rt. Rev. Barbara C. Harris and the Rt. Rev. Bud Cederholm. Bishop Gates extended greetings and good wishes to Bishop Cederholm's wife, Mrs. Ruth Ann Cederholm and to the wives of former bishops, Mrs. Ginny Birney and Mrs. Jodie Johnson.

Bishop Gates introduced several guests to the convention, the Rev. Laura Everett, Executive Director of the Massachusetts Council of Churches; Ms. Lacy Broemel from the Episcopal Church Office of Government Relations; Mr. John Koch, Executive Director of the Barbara C. Harris Camp and Conference Center; Dr. Ruy Costa, Executive Director of Episcopal City Mission and Mr. Dal Nun and Mr. Atim Yaak from the Sudanese Congregation at Grace Church in Everett. All those introduced and recognized received a round of applause.

### **Welcome and Announcements**

Bishop Gates reminded clergy and delegates that they must address themselves to the Chair before speaking and give their name and parish clearly, and say to what they wish to speak. All amendments are to be submitted in writing to the Chair before persons begin their statement. All amendments to resolutions will be read from the head table before voting. In the interest of respect and decorum, there should be no applause during debate and voting. There are no scheduled breaks in the agenda.



Bishop Gates then recognized Mr. Chris Trahan, Senior Warden at St. Stephen's, who offered a welcome on behalf of the church and the North Shore Deanery. He also went over the evacuation plans in the event of an emergency.

### **Bishop's Address**

The Rt. Rev. Alan M. Gates gave the address. *[The full text of the address is included in the Journal of Convention 2014.]*

### **"Being Church" Video & Response**

Bishop Gates recognized Ms. Diane D'Souza, Director of the Mission Institute, and her colleague, Ms. Katie Ernst, who presented the first "Being Church" video and study guide series called "Taking Risks." They then invited the Convention to take part in a question and answer session based on the video.

### **Report of the Committee on Elections**

Bishop Gates recognized the Rev. Harry Walton, Chair of the Committee on Elections. He announced the names of those running in uncontested elections who stood to be recognized: Mr. William Boyce, Lay Deputy to Provincial Synod; The Rev. Rebecca Black, Clerical Alternate to Provincial Synod; Ms. Julie Watt Faqir, Lay Alternate to Provincial Synod; The Rev. Paula Toland, Mr. Jonathan Treat and Ms. Sarah Neumann, Board of Directors of the Barbara C. Harris Center; Angela McConney-Scheepers, Esq., Lay Member of the Standing Committee; The Rev. Andrew Stoessel, Clerical Member of the Disciplinary Board; Ms. B. Judith Fenner and Ms. Julie Shea, Lay Members of the Disciplinary Board; The Rev. Cathy George, Clerical Member of the Cathedral Chapter; Ms. Betsy Munzer, Lay Member of the Cathedral Chapter; Mr. Mark Seidner, Member of the Trustees of Donations; Mr. James Gammill, Treasurer of the Diocese; Mr. Leon A. Brathwaite II, Secretary of the Diocese.

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

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

Nominees for Alternate Clerical Deputy to General Convention (four to be ranked): The Rev. Canon Connie Ng Lam, The Rev. Karen B. Montagno, The Rev. Holly Antolini, The Rev. Julie Carson.

Nominees for Alternate Lay Deputy to General Convention (four to be ranked): Mr. William Boyce, Ms. Betsy Ridge Madsen, Ms. Michele Griffin-MacGregor, Ms. Julie Shea.

Nominees for Clerical Member of the Standing Committee (one to be elected): The Rev. Chris Wendell, The Rev. Dr. Karen Coleman, The Rev. Clyde Elledge, The Rev. Cheryl Minor, Ph. D.

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

### **Celebration of All Saints' Episcopal Church of the North Shore and Bristol Trinity Episcopal Church**

Bishop Gates gave a brief explanation to the Convention about why they were celebrating these new merged entities. The All Saints' presentation then began with a video, followed by a musical procession and brief remarks from the Rev. Marya DeCarlen, Rector, All Saints' Episcopal Church of the North

Shore, Danvers. The Bristol Trinity presentation followed this with remarks from Bristol Trinity members and a video. Following the celebration, Bishop Gates asked for a moment of silent gratitude which was followed by singing rounds of “Alleluia.”

### **Report of the Compensation and Benefits Committee**

Bishop Gates recognized Mr. Jeff Tyrakowski, Chair of the Compensation and Benefits Committee, who gave the report and then moved the Compensation and Benefits Committee’s resolution regarding the clergy compensation standard and formula for 2015, as found on pages H-9-12 of the Handbook, as follows, and the motion was seconded:

*Resolved, that the diocesan Total Clergy Compensation (TCC) be defined as the total of cash stipend, utilities allowance, housing, SECA (Self Employment Contribution Act) allowance, if any, and all other cash compensation paid to an individual clergyperson. TCC does not include benefits (e.g. pension, health or dental insurance, etc.) or reimbursements for job-related expenses as described in the 2015 Guidelines.*

*Resolved, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2015, is determined by the following formula:*

$$TCC\ Standard = \$65,007 + (133.63 \times Points) + \$500 \times [years\ of\ service^* \text{ within congregation}]$$

*Provided that the minimum TCC Standard for full-time parochial clergy is \$69,016.*

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

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

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

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

$$TCC\ Standard\ (curate) = [\$65,007 + (133.63 \times Points)] \times 0.60$$

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

$$TCC\ Standard\ (assistant) = [\$65,007 + (133.63 \times Points)] \times 0.65 \\ + \$350 \times [years\ of\ service\ within\ the\ congregation]$$

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

$$TCC\ Standard\ (associate) = [\$65,007 + (133.63 \times Points)] \times 0.75 \\ + \$375 \times [years\ of\ service\ within\ the\ congregation]$$

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

The Rev. Kathryn Piccard, Cathedral Church of St. Paul, Boston, spoke about the living wage for 2015.

The resolution in its original form was voted.

### **Announcement of Commission on Ministry Appointments**

Bishop Gates thanked the Standing Committee and Commission on Ministry for their time and ongoing support of all those in the process. He then thanked Dr. David Urion, who completed a long and dedicated term of service on the Commission; Ms. Ella Davila Auchincloss and Ms. Karon Gibson-Mueller, Co-Chairs; The Rev. Dr. Libby Gibson, Examining Chaplain and the Rev. Dr. David Killian, Chaplain to Postulants and Candidates. The aforementioned were thanked with applause.

There were 40 people in the ordination process as postulants, candidates and transitional deacons – 31 for the priesthood and 9 for the diaconate. They come from 32 sponsoring congregations throughout 11 deaneries in the diocese. In January 2014, 4 transitional deacons were ordained priests. In June 2014, 9 candidates were ordained transitional deacons.

Bishop Gates moved the following appointments to the Commission on Ministry: The Rev. Miriam Gelfer through Convention 2015; Ms. Ella Davila Auchincloss, Co-chair, Ms. Karon Gibson-Mueller, Co-chair, The Rev. Dr. Libby Gibson, Examining Chaplain, The Rev. Edgar Gutierrez-Duarte, The Rev. Sara Irwin, Mr. Graeme Mills, Ms. Kay Ridgard and The Venerable Pat Zifcak through Convention 2016; The Rev. Edwin Johnson, The Rev. Geoffrey Piper and Mr. David Varner through Convention 2017.

The motion was seconded and voted.

### **Approval of the 2014 Diocesan Budget**

Bishop Gates recognized Mr. Stephen Voysey, Chair of the Budget Committee, to present the proposed 2015 Diocesan Budget. He thanked all those involved in the preparation of the 2015 proposed budget, especially the members of the Budget Committee, staff members the Rev. Canon Mally Lloyd, Ms. Cathy Menard, Ms. Laura Simons, and Treasurer, Mr. Jim Gammill. The Rev. Mr. Voysey reviewed the budget process for the election, transition and consecration of Bishop Alan Gates. He also reported that the Standing Committee and other committees involved will be conducting a thorough review of the process so that there is documentation for the next Bishop's election. Mr. Jim Gammill, Treasurer, then moved the following and it was seconded:

*Resolved, that the 229th Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2015 Diocesan Revenues, Core and Supplemental, described in the Proposed 2015 Diocesan Budget and summarized on pages 8 and 9, including the schedule of individual parish and mission assessments for 2015 listed on pages 11 through 14, with the adjustments approved by the Assessment Coordinating Committee and the Diocesan Council on page 15.*

After brief remarks from the Treasurer, the motion was voted.

Mr. Gammill then moved the following and it was seconded:

*Resolved, that the 229th Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2015 Diocesan Expenses, Core and Supplemental, described in the Proposed 2015 Diocesan Budget and summarized on pages 8 and 9.*

After brief remarks from the Treasurer, the motion was voted.

### **Announcements of the new Mission Hubs and Mission Tithes Grant**

Bishop Gates recognized the Rev. Sam Rodman, who announced that the two new mission hubs are the Metrowest Mission Hub and the North Shore Mission Hub. The Rev. Mr. Rodman then introduced the Rev. Rebecca Black to speak about the Metrowest Mission Hub site. The Rev. Mr. Rodman then introduced the Rev. Debbie Phillips to speak about the North Shore Mission Hub site. The Rev. Mr. Rodman then introduced Ms. Claudette Hunt, Diocesan Council member, who gave an overview of the Mission Tithes Granting process and announced that this year's Mission Tithes Council Grant recipient is El Hogar. Ms. Hunt also announced that an anonymous donor has offered to match the grant. Ms. Hunt then asked that representatives from El Hogar and Epiphany Church, Winchester, come forward to accept the award of \$25,000. The Rev. Thomas Brown, Rector of Epiphany, Winchester, gave brief remarks and asked members of El Hogar in attendance to stand be applauded.

### **Honors and Thanks**

Bishop Gates offered thanks to the following people: to Mr. Leon Brathwaite, Secretary of the Diocese, and Mr. Jim Gammill, Treasurer of the Diocese, the Rev. Mark McKone-Sweet and James Wagner, Esq., outgoing members of the Standing Committee, for their years of service and wise counsel to the Bishops, in particular, during the election and months of transition; To the Rev. Brian McGurk, who has served as dean of the Cape & Islands Deanery and is stepping down. To the Ven. Geof Smith, former Archdeacon, who has resigned and moved to New Hampshire to take up new secular employment. To the staff, clergy and volunteer leadership in the diocese who have contributed to the development and implementation of this Convention, especially to the volunteers and leadership of St. Stephen's Memorial Church. For all who participated in the preparation and planning of Bishop Tom Shaw's funeral service, particularly, the Rev. Sam Lloyd, the Rev. Patrick Ward, the music directors, choirs, ushers and all the staff at Trinity Church, Copley Square, the Brothers of the Society of Saint John the Evangelist, the Rev. Canon Mally Lloyd, and Ms. Ella Auchincloss for the beautiful reception at the Sheraton Hotel following the service.

Bishop Gates then asked members of the Standing Committee, the Discernment Committee, the Transition Committee, the Consecration Committee, the Celebration for Bp Tom Committee and the Diocesan Staff, to stand in place and be recognized.

### **Announcements**

Bishop Gates recognized Mr. Chris Trahan, who gave the announcements about lunch.

*There was a brief break to set up the Sanctuary for the Eucharist.*

### **Holy Eucharist**

The Rt. Rev. Alan M. Gates celebrated and the Rt. Rev. Gayle E. Harris preached with the Rev. James Kodera. *[The text of the sermon/presentation is included in the Journal of Convention 2014.]*

### **Report from Episcopal Relief and Development**

Bishop Gates recalled the meeting to order and recognized Ms. Tinka Perry and Mr. Chad Brinkman who presented a video and gave the report.

## **Election Results**

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

Alternate Clerical Deputies to General Convention:

The Rev. Holly Antolini

The Rev. Karen B. Montagno

The Rev. Julie Carson

The Rev. Canon Connie Ng Lam

Alternate Lay Deputies to General Convention:

Mr. William Boyce

Ms. Julie Shea

Ms. Betsy Ridge Madsen

Ms. Michele Griffin-MacGregor

Clerical Member of the Standing Committee:

The Rev. Chris Wendell

## **Report of the Committee on Resolutions**

Bishop Gates recognized The Hon. Byron Rushing, Parliamentarian, who explained procedures related to the Special Rules of Order, especially around timing and “friendly amendments.”

Bishop Gates then recognized the Rev. Meghan Sweeney, acting Chair of the Resolutions Committee, who gave the Committee on Resolutions report.

1. Bishop Gates recognized the Rev. Anne Minton who moved the following resolution, “Memorializing the 78<sup>th</sup> General Convention to Promote Multi-faith Knowledge among Lay and Ordained Church Leaders” found on page H-13 of the Handbook, and it was seconded:

*Resolved, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts send this Memorial to the 78<sup>th</sup> General Convention: A Memorial calling for materials and programs to be developed for multi-faith education for Episcopal clergy and lay leaders.*

*To the Deputies and Bishops of the Episcopal Church assembled at the 78<sup>th</sup> General Convention:*

*As many of our communities are becoming more religiously and culturally diverse, Episcopal lay leaders and clergy can inadvertently bear false witness against one or more other religions by their teaching and preaching. Most of us know some things about the different major world religions, notably Judaism, Buddhism, Hinduism, Islam and Sikhism, and maybe about Baha’i, Santeria and some other religions. But few of us know much about each of those religions. People who practice them do not appreciate hearing disdainful comments about their religions any more than we do.*

*Basic interfaith knowledge is essential, and ever more urgent. We want to assure that the church is hospitable to visitors and spiritual seekers who come from diverse backgrounds, and to interfaith families, so we don’t diminish the church’s credibility for a generation of seekers coming of age in culturally diverse communities. Recent scholarly studies, both historical and theological, are changing the way the Church views a number of other religions. Therefore within the next triennium we would like to see basic educational resources creatively developed, similar to what was developed for Anti-Racism*

*and Safe Church training, for all clergy active in ministry, and all diocesan and parochial lay leaders, with refresher education at regular intervals.*

*Better knowledge can help us work collaboratively across interfaith lines in our neighborhoods and communities. It expresses our baptismal vow to respect the dignity of every human being. Our sponsorship of this Memorial is evidence of churchwide concern for this matter.*

Submitters, the Rev. Kathryn Piccard and the Rev. Christine Whittaker, spoke to the resolution.

Those who spoke in favor of the resolution included: the Rev. David Killian, Grace Church, Newton; The Rev. Dr. John Townsend, Grace Church, Newton; Ms. Meg Silver, Parish of the Messiah, Auburndale; Mr. Stephen Davis, Diocesan Youth Council.

Ms. Gretchen Schuler, St. Anne's-in-the-fields, Lincoln, spoke against the resolution.

The Rev. Kathryn Piccard moved to amend the resolution to include the following closing sentence "Respectfully submitted by the 229<sup>th</sup> Annual Convention of the Episcopal Diocese of Massachusetts, November 8, 2014."

The amendment was carried by majority voice vote.

*Resolved, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts send this Memorial to the 78<sup>th</sup> General Convention: A Memorial calling for materials and programs to be developed for multi-faith education for Episcopal clergy and lay leaders.*

*To the Deputies and Bishops of the Episcopal Church assembled at the 78<sup>th</sup> General Convention:*

*As many of our communities are becoming more religiously and culturally diverse, Episcopal lay leaders and clergy can inadvertently bear false witness against one or more other religions by their teaching and preaching. Most of us know some things about the different major world religions, notably Judaism, Buddhism, Hinduism, Islam and Sikhism, and maybe about Baha'i, Santeria and some other religions. But few of us know much about each of those religions. People who practice them do not appreciate hearing disdainful comments about their religions any more than we do.*

*Basic interfaith knowledge is essential, and ever more urgent. We want to assure that the church is hospitable to visitors and spiritual seekers who come from diverse backgrounds, and to interfaith families, so we don't diminish the church's credibility for a generation of seekers coming of age in culturally diverse communities. Recent scholarly studies, both historical and theological, are changing the way the Church views a number of other religions. Therefore within the next triennium we would like to see basic educational resources creatively developed, similar to what was developed for Anti-Racism and Safe Church training, for all clergy active in ministry, and all diocesan and parochial lay leaders, with refresher education at regular intervals.*

*Better knowledge can help us work collaboratively across interfaith lines in our neighborhoods and communities. It expresses our baptismal vow to respect the dignity of every human being. Our sponsorship of this Memorial is evidence of churchwide concern for this matter.*

*Respectfully submitted by the 229<sup>th</sup> Annual Convention of the Episcopal Diocese of Massachusetts, November 8, 2014.*

There being no other discussion, motion was carried, as amended, by majority vote.

2. Bishop Gates then recognized the Rev. Thomas Brown who moved the resolution “Calling for Sustainable and Responsible Investment of Diocesan Endowments” found on page H-14 of the Handbook, and it was seconded:

*Resolved, that the 229th Convention of the Diocese of Massachusetts endorses a broad, inclusive approach to sustainable and responsible investing, consistent with the current diocesan investment policy statement; and be it further*

*Resolved, that the 229th Convention of the Diocese of Massachusetts calls on lay and clergy leaders to pray for and advocate managers of Episcopal endowments who will work to develop sustainable and responsible investment policies and processes; and be it further*

*Resolved, that the 229th Convention of the Diocese of Massachusetts asks members of the diocese to recognize and support that there are a diversity of approaches to sustainable and responsible investing.*

The Rev. Thomas Brown spoke to the resolution.

Those who spoke in favor of the resolution included: The Rev. Jane Bearden, Trinity Church, Haverhill.

Those who spoke against the resolution included: The Rev. Joyce Caggiano, St. Michael’s Church, Milton; Ms. Dickie Allison, Church of the Messiah, Woods Hole.

The motion was carried by majority vote.

3. Bishop Gates then recognized the Rt. Rev. Bud Cederholm, who moved the resolution “A Call to the 78<sup>th</sup> General Convention of the Episcopal Church for Environmentally Responsible Investing” found on page H-16 of the Handbook, and it was seconded:

*Resolved, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts join with other Episcopal dioceses and Episcopalians for Fossil Fuel Divestment/Reinvestment who share a common commitment to act for a sustainable environment in calling upon the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to divest from fossil fuel companies and reinvest in clean renewable energy, and be it further*

*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to adopt a policy to refrain from this time forward from purchasing any new holdings of public equities and corporate bonds of the world’s leading 200 fossil fuel companies as identified by the Carbon Underground<sup>d</sup>, and be it further*

*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a plan to divest within five years from direct ownership of public equities and corporate bonds of the world’s leading 200 fossil fuel companies as identified by the Carbon Underground, and be it further*

Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a strategy to invest 5% within two years and 10% within four years of their overall holdings in “impact investments” in the clean energy sector, and be it further

Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts memorialize the 78<sup>th</sup> General Convention of the Episcopal Church to encourage all dioceses and the Consortium of Endowed Episcopal Parishes to engage the topic of divestment from fossil fuels and clean energy reinvestment within the coming year.

The Rt. Rev. Bud Cederholm, retired Bishop Suffragan, moved the following amendment to the fifth resolve:

Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts memorialize the 78<sup>th</sup> General Convention of the Episcopal Church: ~~to encourage all dioceses and the Consortium of Endowed Episcopal Parishes to engage the topic of divestment from fossil fuels and clean energy reinvestment within the coming year.~~

**To the Deputies and Bishops of the Episcopal Church assembled at the 78<sup>th</sup> General Convention:**

**Given the proven dangers to the environment and all life on earth due to the burning of fossil fuels, and given fossil fuel companies’ business plans to extract and use all fossil fuel reserves in the ground, we urge all dioceses of the Episcopal Church and the Consortium of Endowed Episcopal Parishes to engage the topic of divestment from fossil fuels and reinvestment in clean energy within the coming year.**

The amendment carried by majority voice vote.

The Rt. Rev. Bud Cederholm, retired Bishop Suffragan, spoke to the resolution.

Mr. Terry Robinson, lay delegate from Good Shepard, Waban, moved to amend the resolution by deleting all of the 4<sup>th</sup> resolved paragraph that calls for the investment of 10% of the Pension Fund and the Endowment Fund in the clean energy sector.

Resolved, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts join with other Episcopal dioceses and Episcopalians for Fossil Fuel Divestment/Reinvestment who share a common commitment to act for a sustainable environment in calling upon the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to divest from fossil fuel companies and reinvest in clean renewable energy, and be it further

Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to adopt a policy to refrain from this time forward from purchasing any new holdings of public equities and corporate bonds of the world’s leading 200 fossil fuel companies as identified by the Carbon Underground, and be it further

Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a plan to divest within five years from direct ownership of public equities and corporate bonds of the world’s leading 200 fossil fuel companies as identified by the Carbon Underground, and be it further



~~*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a strategy to invest 5% within two years and 10% within four years of their overall holdings in “impact investments” in the clean energy sector, and be it further*~~

*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts memorialize the 78<sup>th</sup> General Convention of the Episcopal Church:*

*To the Deputies and Bishops of the Episcopal Church assembled at the 78<sup>th</sup> General Convention:*

*Given the proven dangers to the environment and all life on earth fur to the burning of fossil fuels, and given fossil fuel companies’ business plans to extract and use all fossil fuel reserves in the ground, we urge all dioceses of the Episcopal Church and the Consortium of Endowed Episcopal Parishes to engage the topic of divestment from fossil fuels and reinvestment in clean energy within the coming year.*

The amendment carried by majority vote.

*Resolved, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts join with other Episcopal dioceses and Episcopalians for Fossil Fuel Divestment/Reinvestment who share a common commitment to act for a sustainable environment in calling upon the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to divest from fossil fuel companies and reinvest in clean renewable energy, and be it further*

*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to adopt a policy to refrain from this time forward from purchasing any new holdings of public equities and corporate bonds of the world’s leading 200 fossil fuel companies as identified by the Carbon Underground, and be it further*

*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a plan to divest within five years from direct ownership of public equities and corporate bonds of the world’s leading 200 fossil fuel companies as identified by the Carbon Underground, and be it further*

*Resolved, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts memorialize the 78<sup>th</sup> General Convention of the Episcopal Church:*

*To the Deputies and Bishops of the Episcopal Church assembled at the 78<sup>th</sup> General Convention:*

*Given the proven dangers to the environment and all life on earth fur to the burning of fossil fuels, and given fossil fuel companies’ business plans to extract and use all fossil fuel reserves in the ground, we urge all dioceses of the Episcopal Church and the Consortium of Endowed Episcopal Parishes to engage the topic of divestment from fossil fuels and reinvestment in clean energy within the coming year.*

The Rev. Thomas Brown spoke in favor of a Carbon Tax.

Ms. Anne Goldman, St. Paul's Church, Newton Highlands, spoke in favor of the resolution and noted that though the Convention voted in favor of a Carbon Tax last year and that not much had been done so far.

The motion carried, as amended, by majority vote.

4. Bishop Gates then recognized the Rev. Ray Low who moved to amend the resolution "Calling for Divestment from U.S. Companies Dealing with the West Bank Settlements" found on page H-19 of the Handbook, to omit the word "directs" from the first resolve and replace it with "calls upon" and to completely remove the second resolve from consideration:

*~~Resolved, that this Diocesan Convention directs calls upon the Trustees of Donations to divest from their portfolios any shares of Caterpillar, Hewlett-Packard and Motorola Solutions; and be it further~~*

*~~Resolved, that the 229th Convention of the Diocese of Massachusetts submit the first resolve of this resolution to the 78th General Convention of the Episcopal Church.~~*

The resolution was seconded as amended and the amendment carried with majority vote.

The Rev. Ray Low spoke to the resolution as amended.

*Resolved, that this Diocesan Convention calls upon the Trustees of Donations to divest from their portfolios any shares of Caterpillar, Hewlett-Packard and Motorola Solutions.*

The Rev. Steve Ayers, Old North Church, Boston, spoke against the resolution, particularly about the implementation of it being very labor intensive for the Trustees of Donations.

Michael Robins, Church of Our Saviour, Brookline; The Rev. Chris Bowman, Parish of the Epiphany, Walpole; and the Rev. Dr. John Townsend, Grace Church, Newton, spoke against the resolution.

Mr. James Dilday, St. Cyprian's Church, Roxbury, spoke in favor of the resolution.

The motion, as amended, failed.

### **Resolutions in Response to the Bishops' Addresses**

The Rev. Meghan Sweeney moved the following, and it was seconded:

*Resolved, that the 229th Convention of the Diocese of Massachusetts in thanksgiving for the ministry of our former bishop M. Thomas Shaw, SSJE extends its condolences to the Brothers of the Society of St. John the Evangelist, and to his sister, Penny, his brothers Sam and Steve, and their extended families; and be it further*

*Resolved, that the 229th Convention of the Diocese of Massachusetts welcomes to his first convention our new bishop diocesan, the Rt. Rev. Alan Gates and his wife, Ms. Patricia Harvey. This Convention affirms that our diocese is facing forward with gratitude and hope, and moving from strength to strength in companionship with him; and be it further*

*Resolved, that the 229th Convention of the Diocese of Massachusetts concurs with the Bishop's request to postpone until Convention 2016 the presentation of the Diocesan Mission Strategy in order to allow the bishop and Diocesan Council ample time to listen and learn; and be it further*

*Resolved, that the 229th Convention of the Diocese of Massachusetts extends its gratitude to our bishop suffragan, the Rt. Rev. Gayle E. Harris, and the Rev. Dr. James T. Koderer for calling us to account for the use of nuclear weapons by the United States of America. And we thank them for calling us as Christians to use the upcoming 70th anniversary of the bombing of Hiroshima and Nagasaki as an occasion to wage peace.*

The motion carried by majority voice vote.

### **Clergy Introductions**

Bishop Gates introduced the deacons, transitional deacons and priests newly ordained since Convention 2013, as well as clergy who have become canonically resident or licensed and those who have retired since Convention 2013.

### **Other Introductions**

Bishop Gates invited the following groups to come forward and introduce themselves: Life Together interns; deacons; the Diocesan Youth Council; and postulants and candidates for ordination.

### **Closing and Adjournment**

All legislative matters were concluded and Bishop Gates called for a motion to adjourn at 3:30pm. It was seconded and voted.

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

# Handbook

## The 229th Annual Convention of the Episcopal Diocese of Massachusetts



*Answering God's urgent call. Together.*

**St. Stephen's Memorial Church  
74 South Common Street  
Lynn, Massachusetts**

**PLEASE BRING THESE MATERIALS TO CONVENTION**

**CALL TO THE CONVENTION**  
**NOTICE OF THE 229th ANNUAL SESSION OF THE CONVENTION**  
**OF**  
**THE EPISCOPAL DIOCESE OF MASSACHUSETTS**

**In accordance with Article 3, Section 3, of the Constitution of the Diocese of Massachusetts, I hereby issue the formal call for the two hundred twenty-ninth annual session of the Convention of the Diocese of Massachusetts, which will begin at thirty minutes past eight o'clock on the morning of Saturday, November 8, 2014, at St. Stephen's Memorial Church in Lynn, Massachusetts.**

**LEON A. BRATHWAITE II**

**Secretary of Convention**

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## **ORDER OF BUSINESS**

- 7:15 a.m.      **REGISTRATION** opens
- 8:30 a.m.      **OPENING DEVOTIONS**
- 8:45 a.m.      **CALL TO ORDER OF LEGISLATIVE SESSION**  
 Declaration of Constitutional Quorum  
 Invitation to Honorary Seats  
 Permission to Speak  
 Report of the Committee on Dispatch of Business  
 Acceptance of Special Rules of Order  
 Receiving of Reports by Title: 2013 Journal  
 Report of the Qualifications Committee  
 Welcome from Mr. Chris Trahan, Senior Warden of St. Stephen's Memorial Church
- 9:00 a.m.      **BISHOP'S ADDRESS** – The Rt. Rev. Alan M. Gates
- 9:30 a.m.      “Being Church” Video & Response
- 10:00 a.m.     **Diocesan Elections**
- 10:15 a.m.     **Celebration of All Saints' Episcopal Church of the North Shore, Danvers and Bristol Trinity Episcopal Church, North Easton**
- 10:35 a.m.     **Report of the Compensation and Benefits Committee**  
**Approval of Commission on Ministry Appointments**  
**Report of the Budget Committee**  
                     **Approval of Diocesan Assessments for 2015**  
                     **Approval of 2015 Budget**
- 11:10 a.m.     **Announcement of New Mission Hubs and Mission Tithe Grant**
- 11:25 a.m.     **Honors and Thanks**
- 11:30 p.m.     **HOLY EUCHARIST**  
                     The Rt. Rev. Alan M. Gates, Celebrant  
                     The Rt. Rev. Gayle E. Harris, Preacher
- 12:30 p.m.     **Lunch**

- 1:30 p.m.      RECALL TO ORDER
- 1:35 p.m.      Report from Episcopal Relief and Development
- 1:55 p.m.      Report of the Elections Committee  
 Report of the Resolutions Committee  
 Resolution in Response to the Bishop's Address  
 Other Reports as Required
- 3:30 p.m.      Introduction of New and Retired Clergy  
 Other Introductions: Interns, Deacons, Diocesan Youth Council,  
 Postulants and Candidates
- 4:00 p.m.      Closing and Adjournment

### **SPECIAL RULES OF ORDER**

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

MOVED:

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



## NOMINEES FOR DIOCESAN ELECTIONS

With Results of Uncontested Elections

### Nominees for ALTERNATE CLERICAL DEPUTIES to the 2015 GENERAL CONVENTION

(4 to be ranked) *Nominees listed in random order as they will appear on the ballot.*

**The Rev. Canon Connie Ng Lam**, Canon for Asian American Ministries, Cathedral Church of St. Paul, Boston

In my position as the Canon for Asiamerican Ministries, it is my privilege and call to strengthen, enrich and expand the Asiamerican ministry in the Diocese of Massachusetts. I anticipate working with the clergy and laity from other dioceses for a better future of Asiamerican ministries in the Episcopal Church through the General Convention. I want to represent the good work of the Diocese of Massachusetts.

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

I am excited about the Episcopal Church, its traditions and its future. I am committed to the life of our communities of faith. I have contributed to that life as a dean at Episcopal Divinity School, parish priest, diocesan staff, retreats, diocesan committees on formation, ethnic ministry, social justice and General Convention's State of the Church Subcommittee. I have attended General Conventions in a variety of capacities and would like to serve again.

**The Rev. Holly Antolini**, Rector, St. James's Church, Cambridge

I have served at four of the last six General Conventions, discerning the Holy Spirit at work in the democracy and diversity that is the Episcopal Church, in my capacity as a good listener and articulator in the development of legislation in the midst of that holy and prayerful diversity. I hope to serve my diocese and church in that capacity again in 2015, to help the church move courageously toward "a new creation."

**The Rev. Julie Carson**, Rector, St. Andrew's Church, Framingham

The Rev. Ms. Carson has been rector of St. Andrew's in Framingham since 2007. She is the clerical representative to Diocesan Council from the Concord River Deanery, is on the founding board of the Metrowest Mission Hub, is convener of the Framingham Interfaith Clergy Association and has served on several boards for nonprofit organizations. She holds a deep interest in the work of the wider church, and looks forward to participating in it.

**Nominees for ALTERNATE LAY DEPUTIES to the 2015 GENERAL CONVENTION**  
 (4 to be ranked) *Nominees listed in random order as they will appear on the ballot.*

**Mr. William C. Boyce**, Grace Church, New Bedford  
 Through my service as a member of vestry, Diocesan Youth Council, Diocesan Council, the Discernment Committee and the Diocese of Massachusetts Delegation to the Episcopal Youth Event, I have been able to see the blessings and power of the church to bring love, justice, and peace to a hurting world when we come together. As an Alternate to General Convention, I would continue to share in making a difference through the church's Strength, when united.

**Ms. Betsy Ridge Madsen**, Church of the Advent, Boston  
 I have served the diocese on Diocesan Council, Standing Committee and at General Convention (five terms), am active in my parish and teach at Epiphany School in Dorchester (16 years). I seek to serve you as a seasoned resource for our deputation with strong prayerful leadership. My vision: As we gather in the name of Jesus, listening faithfully, creating good legislation, we can effect hope, peace, justice and a sound environment.

**Ms. Michele Griffin-MacGregor**, St. Andrew's Church, Framingham  
 I have been a member of this diocese since 1982. I am a lay graduate of Episcopal Divinity School, earning an M.Div. in 1996. I am senior warden at St. Andrew's, and coordinate the Adult Education/ Spiritual Life Program there. I am a deanery representative to the Concord River Deanery and served on the Discernment Committee. I'm interested in further serving the diocese, and learning more about the church and how to possibly serve it.

**Ms. Julie Shea**, St. John's Church, Winthrop  
 Julie Shea is a parishioner at St. John's Church in Winthrop and is an educator. As a member of a small parish, Julie is interested in the sustainability of parishes. She would like to increase dialogue and planning around concrete ways to help small parishes remain viable in the setting of limited resources. Julie has been the clerk on her parish's vestry for seven years and served on the Discernment Committee for the new bishop.

**Nominees for CLERICAL Member of the STANDING COMMITTEE**

(1 to be elected) *Nominees listed in random order as they will appear on the ballot.*

**The Rev. Chris Wendell**, Rector, St. Paul's Church, Bedford  
Having served seven years in two parishes (including three on Diocesan Council), I'm ever more aware and grateful for the broad diversity of people and congregations in our diocese. We're blessed to share a variety of experiences of Christ, the church and the world. I hope to aid in the Standing Committee's work of building positive, accountable relationships of trust across those differences in our diocese to further our shared ministry in meaningful, creative ways.

**The Rev. Dr. Karen Coleman**, Rector, St. James's Church, Somerville  
As Chairperson of the Consecration Committee, I worked closely with the Standing Committee and with Bishop Gates to facilitate an inviting and inclusive diocesanwide event. I seek to continue my faith journey during this exciting new chapter in the life of the diocese by serving on the Standing Committee and helping to support our diverse congregations.

**The Rev. Clyde Elledge**, Rector, St. Andrew's Church, Marblehead  
I've served in several dioceses during my vocation. I served on the Finance and Budget Commission in Michigan, the Social Justice Commission in Ohio and was dean of the Waukegan Deanery in Chicago. I have passion for the faith and love our church. I have begun my fourth year as rector of St. Andrew's Church in Marblehead and would be honored to serve our diocese as it begins a new chapter of its history.

**The Rev. Cheryl V. Minor, Ph.D.**, Co-Rector, All Saints' Church, Belmont

Cheryl has been a priest in the diocese for 17 years, serving as co-rector of All Saints' Church in Belmont with her husband, the Rev. Paul Minor. At All Saints', Cheryl has been responsible for the formation of children and families, developing an internationally known Godly Play program, and has taken the primary responsibility for the property. Cheryl hopes to be elected to bring her wealth of parish experience and passion for children to the diocese.

## UNCONTESTED ELECTIONS

The following nominees were unopposed.

### **Lay Deputy to Provincial Synod (1-year term)**

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

### **Clerical Alternate to Provincial Synod (3-year term)**

The Rev. Rebecca Black, Christ Church, Medway; St. Paul's Church, Hopkinton; Epiphany Church, Walpole

### **Lay Alternate to Provincial Synod (3-year term)**

Ms. Julie Watt Faqir, St. Paul's Church, Hopkinton

### **Members of the Board of Directors to the Barbara C. Harris Center**

The Rev. Paula J. Toland, Priest-in-Charge, St. John's Church, Franklin (3-year term)

Mr. Jonathan B. Treat, Parish of the Epiphany, Winchester (3-year term)

Ms. Sarah Neumann, Church of the Redeemer, Lexington (1-year term)

### **Lay Member of the Standing Committee**

Angela McConney-Scheepers, Esq., Church of the Good Shepherd, Dedham

### **Clerical Member of the Disciplinary Board (3-year term)**

The Rev. Andrew J. Stoessel, Rector, St. Michael's Church, Marblehead

### **Lay Members of the Disciplinary Board (3-year terms)**

Ms. B. Judith Fenner, St. Peter's Church, Osterville

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

### **Clerical Member of the Cathedral Chapter**

The Rev. Cathy H. George, Interim, Church of the Redeemer, Chestnut Hill

### **Lay Member of the Cathedral Chapter**

Ms. Betsy Munzer, St. Paul's Church, Brookline

### **Trustees of Donations**

Mr. Mark P. Seidner, Old North Church, Boston

### **Treasurer of the Diocese**

Mr. James Gammill, Parish of the Epiphany, Winchester

### **Secretary of the Diocese**

Mr. Leon A. Brathwaite II, Grace Church, Vineyard Haven

## **REPORT OF THE COMPENSATION AND BENEFITS COMMITTEE OF THE DIOCESAN COUNCIL**

### **Purpose of Committee**

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

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

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

### **Goals for the Committee**

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

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

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

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

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

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

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

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

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

### **Summary of Committee Work in 2014**

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

The committee has reviewed the health insurance plans and rates presented by the Medical Trust that are available through the Denominational Health Plan (DHP) for 2015. The rate increase on our two most commonly used plans is approximately 4%, which is below the generally accepted rate of health care inflation. As reported last year, it has been the policy of the committee to establish a congregation's mandate for payment of premiums on "the lowest cost comprehensive plan," which remains the CIGNA Open Access Plus (OAP) plan. The committee reiterates that the OAP plan rates traded places with the "Open Access Plus In-Network" (OAP-IN) as the lowest cost comprehensive plan with the 2013 renewal. Since this remained the case with the 2014 renewal, the committee re-set the OAP as the default/base plan option for premium payment at that time. This should be taken into account during this year's Open Enrollment. We also note that the OAP rates remain 5% *below* their 2012 levels, while the OAP-IN rates are up approximately 18.8% over that period. We refer you to the CBC Guidelines for additional information on the requirements for lay parity in the provision of benefits consistent with General Convention Resolution A177.

The DHP continues to offer the CIGNA High Deductible Health Plan/Healthcare Savings Account (HSA) option. When properly utilized, this plan provides both outstanding health insurance protection and the potential for long-term savings and accumulation within the HSA. Participation in this plan is purely optional, and our guidelines stipulate the congregation's funding obligation for the companion HSA account.

The committee worked closely with members of the Executive and Sabbatical Committees to improve our guidelines regarding sabbaticals. We reaffirm our support of this important benefit, which is an opportunity for rest, renewal and growth for both clergypersons and congregations. Since planning for this benefit should begin at least nine months prior to the first day of leave, we encourage parish leaders to add this discussion to their agendas at the appropriate time.

Clergy Housing Allowances are an emerging issue that the committee has been tracking due to a recent U.S. District Court ruling that called into question the tax-preferred nature of this benefit. Since the ruling stated that it would not take effect until all appeals are resolved, there

is no change to the Housing Allowance at this time. Additional guidance can be obtained on this topic from the 2014 Tax Guide for Episcopal Ministers available at [cpg.org](http://cpg.org).

The committee has conducted its annual review of the Total Clergy Compensation Standard (TCC Standard) and has voted unanimously to recommend an increase to the Standard for 2015 of 3% compared to the Standard for 2014 (*see the following Resolution*). Established following the committee's compensation study of 2000-2001, the TCC has the express purpose of establishing a more consistent *minimum* standard, and raising incomes in a more equitable fashion across thed. The committee reaffirms that the TCC methodology is achieving its intended goals, and encourages all congregations to recalculate their TCC Standard annually, *regardless of whether it intends to make any adjustment for the coming year*. We continue to refine the Clergy Compensation Report process (as required by canon since 1908) and thank everyone involved for the greatly improved response rate.

### **Members of the Committee**

The Rev. Gretchen S. Grimshaw

Ms. Carol Kingston

David A. Kirchner, Esq.

Paige Manning, Esq.

The Rev. Dr. Jean Baptiste Ntagengwa

Mr. Fred Ritzau

The Rev. Andrew J. Stoessel

Mr. Jeff Tyrakowski, Chair

The Rev. Christopher S. Wendell

John V. Woodard, Esq.

### **Adjustments to the Compensation Formulae**

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

## Resolutions on Clergy Compensation and Benefits

**Resolved**, that the diocesan Total Clergy Compensation (TCC) be defined as the total of cash stipend, utilities allowance, housing, SECA (Self Employment Contribution Act) allowance, if any, and all other cash compensation paid to an individual clergyperson. TCC does not include benefits (e.g. pension, health or dental insurance, etc.) or reimbursements for job-related expenses as described in the 2015 Guidelines.

**Resolved**, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2015, is determined by the following formula:

$$\text{TCC Standard} = \$65,007 + (133.63 \times \text{Points}) + \$500 \times [\text{years of service}^* \text{ within congregation}]$$

Provided that the minimum TCC Standard for full-time parochial clergy is \$69,016.

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

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

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

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

$$\text{TCC Standard (curate)} = [\$65,007 + (133.63 \times \text{Points})] \times 0.60$$

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

$$\begin{aligned} \text{TCC Standard (assistant)} &= [\$65,007 + (133.63 \times \text{Points})] \times 0.65 \\ &+ \$350 \times [\text{years of service within the congregation}] \end{aligned}$$

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

$$\begin{aligned} \text{TCC Standard (associate)} &= [\$65,007 + (133.63 \times \text{Points})] \times 0.75 \\ &+ \$375 \times [\text{years of service within the congregation}] \end{aligned}$$

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



## REPORT OF THE COMMITTEE ON RESOLUTIONS

The committee presents four resolutions, each found to be in order and hereby submitted to the 229th Convention of the Episcopal Diocese of Massachusetts for consideration.

### **1. A Resolution Memorializing the 78<sup>th</sup> General Convention to Promote Multi-faith Knowledge Among Lay and Ordained Church Leaders**

Submitted by The Rev. Kathryn Piccard, The Rev. Christine Whittaker, The Very Rev. John P. Streit, Jr., The Rev. Anne M. Minton, The Rev. Victor Kazanjian and The Rev. Canon Dr. Katharine C. Black

**Resolved**, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts send this Memorial to the 78<sup>th</sup> General Convention: A Memorial<sup>1</sup> calling for materials and programs to be developed for multi-faith education for Episcopal clergy and lay leaders.

To the Deputies and Bishops of the Episcopal Church assembled at the 78<sup>th</sup> General Convention:

As many of our communities are becoming more religiously and culturally diverse, Episcopal lay leaders and clergy can inadvertently bear false witness against one or more other religions by their teaching and preaching. Most of us know some things about the different major world religions, notably Judaism, Buddhism, Hinduism, Islam and Sikhism, and maybe about Baha'i, Santeria and some other religions. But few of us know much about each of those religions. People who practice them do not appreciate hearing disdainful comments about their religions any more than we do.

Basic interfaith knowledge is essential, and ever more urgent. We want to assure that the church is hospitable to visitors and spiritual seekers who come from diverse backgrounds, and to interfaith families, so we don't diminish the church's credibility for a generation of seekers coming of age in culturally diverse communities. Recent scholarly studies, both historical and theological, are changing the way the Church views a number of other religions. Therefore within the next triennium we would like to see basic educational resources creatively developed, similar to what was developed for Anti-Racism and Safe Church training, for all

<sup>1</sup> Background section on Memorials from the website of The Episcopal Church (<http://www.episcopalchurch.org/>)

1. Resolutions are the routine way to make changes at General Conventions, but they are not the only way.

2. Some things are better presented as Memorials, another official category.

3. Changes in the budget can also make things happen.

Memorials are submitted by provinces, dioceses, bishops, deputies and CCAB's to highlight interest, concern or opinion on a particular subject. Memorials to General Convention have often been the catalyst for major initiatives or changes in the mission and ministry of the Episcopal Church.

In the legislative context, a memorial is comparable to a petition: a statement about a matter of great importance that urges the General Convention to take action. A memorial should present arguments for the proposed action, and may present evidence of widespread concern for the matter being memorialized. Memorials are referred to a legislative committee to inform their deliberations. Although not a resolution itself, a memorial informs committees as they perfect legislation.

Memorials should be submitted in the following form:

To the Deputies and Bishops in the Episcopal Church assembled at the 78<sup>th</sup> General Convention:

(Here follows a description of the action being urged and arguments for the action.)

Respectfully submitted,

(Here follow the name or names of the dioceses, provinces, bishops, deputies or CCABs submitting the Memorial.)

clergy active in ministry, and all diocesan and parochial lay leaders, with refresher education at regular intervals.

Better knowledge can help us work collaboratively across interfaith lines in our neighborhoods and communities. It expresses our baptismal vow to respect the dignity of every human being. Our sponsorship of this Memorial is evidence of churchwide concern for this matter.

#### Explanation

To respect the dignity of every human being, and to avoid bearing false witness against our neighbors and to help avoid and/or reduce inter-religious tension, we would like a one-day training to be developed that provides basic information about different religions, corrects inaccurate stereotypes, conveys recent historical and theological scholarship about Jews and Judaism and corrects erroneous Church teachings and provides references and resources for more accurate Bible translations where needed.

#### Statement Against

Is this a matter of political correctness? Are you saying that our clergy need to know about things like Hindu deities? Sharia law? Ramadan? Buddhist contemplation? Why? This is expecting too much because it's hardly relevant to their ministries.

#### Implementation Requirements

The secretary of the Massachusetts Diocesan Convention must promptly certify the passage of the Memorial at the November 8, 2014, convention, and forward this to the Executive Office of the General Convention Staff: Ms. Marian Conboy, Executive Assistant/Deputy for Legislation, Email: mconboy@episcopalchurch.org; Phone: (212) 716-6205

## **2. Sustainable and Responsible Investment of Diocesan Endowments**

Submitted by: The Rev. Thomas J. Brown and Mr. James F. Gammill, Jr.

**Resolved**, that the 229th Convention of the Diocese of Massachusetts endorses a broad, inclusive approach to sustainable and responsible investing, consistent with the current diocesan investment policy statement; and be it further

**Resolved**, that the 229th Convention of the Diocese of Massachusetts calls on lay and clergy leaders to pray for and advocate managers of Episcopal endowments who will work to develop sustainable and responsible investment policies and processes; and be it further

**Resolved**, that the 229th Convention of the Diocese of Massachusetts asks members of the diocese to recognize and support that there are a diversity of approaches to sustainable and responsible investing.

#### Explanation

This resolution offers an alternative response to the recent trend to call, through the resolution process, for divestment of endowment assets as the superior response to the significant and complex obstacles towards reconciling daily living in a capitalist-based economy with our baptismal promises to seek and serve Christ in all persons.

This resolution refers to the current diocesan investment policy which identifies three broad types of sustainable and responsible investing (“SRI”) practices: (a) invest and engage; (b) divest, or offset, and protest; and (c) dual purpose investing. The full diocesan investment policy statement is found at <http://www.diomass.org/inside/docs/investment-policy-statement>, and the discussion of SRI is found on pages five through seven of that statement.

This resolution reflects the biblical examples for respecting different perspectives and talents, including from St. Paul who reminds us that many different members make up the body of Christ; the gift of the Holy Spirit at Pentecost in which people of various tribes spoke in different tongues; and from the Book of Job, in which dissent and engagement within a community is honored as faithful practice.

This resolution also draws on the historical tradition of the Episcopal Diocese of Massachusetts, which has often given individual congregations a stronger voice, and empowers local action as opposed to top-down directives. The resolution recognizes that there are many different managers of Episcopal endowments, and that each manager should take an active role in the development of broad SRI policies and practices, instead of passively relying on a diocesanwide resolution to do that for them.

The above statements in support speak to the broad nature of this resolution. The resolution is also a specific response to the recent and current proposals to divest fossil-fuel related stocks.

This resolution is grounded in the knowledge that climate change is a serious issue and that the burning of fossil fuels contributes significantly to the associated problems. Therefore it creates some separation between the science of climate change and the tactic of divestment.

We cannot be selective in which sciences we take seriously and which ones we dismiss. Regarding divestment as a means by which to combat climate change, economic science is clear that divestment activities will not affect the fossil fuel companies’ access to capital. Reducing our use of fossil fuels is imperative, and increased cost of those products, including through a carbon-based tax, would be more effective than divestment.

An economic and political science analysis would also identify the many differences between the circumstances surrounding the divestment from South African investments in the 1980s and today’s campaign for fossil fuel divestment. The South African divestment movement was part of a larger economic boycott that sought to isolate South Africa from the world economy. In contrast, there is no way at this time for the world economy to isolate itself from carbon-based fuels, and thus divestment activities will be limited to symbolic statements.

This resolution is not intended to dissuade those endowment managers who thoughtfully and prayerfully come to a decision to divest from fossil fuels. Instead, it provides support for other Episcopal agencies and managers of various Episcopal Church-based endowments to continue their commitment to developing alternative SRI policies and actions.

#### Statement Against

The 228th Convention voted overwhelmingly in favor of the Resolution Calling for Environmentally Responsible Investing, and this resolution is intended to water it down.

The organization 350.org, headed by Bill McKibben, is a lead activist in the fossil fuel divestment campaign. The 350.org website has the following response (prepared by Pitzer College) to those opposed to fossil fuel divestment:

- (1) Divestment changes the public discourse on our collective energy future; it's aimed not at oil companies, but at those who must craft a public policy consistent with a habitable planet.
- (2) Money managers are nothing if not adaptable to client demand, and are already offering funds free of fossil fuel.
- (3) Without question, climate change is politicized daily, but at its heart climate science has nothing to do with politics. On issues of great moral consequence the academy has a duty to educate not only its students but society at large. Divestment is an educational statement, not a political one.
- (4) [In response to the charge of hypocrisy in selling fossil fuel companies while tanking up our cars], the real hypocrisy is saying that you support a world largely free of fossil fuel emissions, while at the same time betting on their producers to continue delivering a steady profit stream.

### Implementation Requirements

If an endowment manager seeks to review or revise its Sustainable and Responsible Investing policy, then the endowment manager should expect to have multiple meetings to discern the SRI policy appropriate for its organization, and to eventually involve the organization's governing board. Presumably there will be a variety of people from many parts of the diocese (including the treasurer) who will be able to offer guidance and materials that would help with implementation.

### **3. A Call to the 78th General Convention of the Episcopal Church for Environmentally Responsible Investing**

Submitted by The Rev. Grant Barber, The Rev. Christian Brocato, The Rt. Rev. Bud Cederholm, The Rev. Tim Crellin, The Rev. Noah Evans, Dr. Anne Ipsen Goldman, The Rev. Billie Gordon, Ms. Hilary Greene, The Rev. Gretchen Grimshaw, The Rev. Martha Hubbard, The Rev. Edwin Johnson, Mr. Michael Lobo, Ms. Elizabeth McKenzie, Ms. Connie Melahoures, The Rev. Laurie Rofinot, The Rev. Robert Sherwood, The Rev. Barbara Smith-Moran, Ms. Dawn Tesorero, Ms. Ann Toffey and The Rev. Deborah Warner

**Resolved**, that the 229<sup>th</sup> Convention of the Diocese of Massachusetts join with other Episcopal dioceses and Episcopalians for Fossil Fuel Divestment/Reinvestment who share a common commitment to act for a sustainable environment in calling upon the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to divest from fossil fuel companies and reinvest in clean renewable energy, and be it further

**Resolved**, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to adopt a policy to refrain from this time forward from purchasing any new holdings of public equities and corporate bonds of the world's leading 200 fossil fuel companies as identified by the Carbon Underground<sup>2</sup>, and be it further

<sup>2</sup> <http://fossilfreeindexes.com/the-carbon-underground-2014/>

**Resolved**, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a plan to divest within five years from direct ownership of public equities and corporate bonds of the world's leading 200 fossil fuel companies as identified by the Carbon Underground<sup>3</sup>, and be it further

**Resolved**, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts calls on the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund to develop and implement a strategy to invest 5% within two years and 10% within four years of their overall holdings in "impact investments" in the clean energy sector, and be it further

**Resolved**, that this 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts memorialize the 78<sup>th</sup> General Convention of the Episcopal Church to encourage all dioceses and the Consortium of Endowed Episcopal Parishes to engage the topic of divestment from fossil fuels and clean energy reinvestment within the coming year.

### Explanation

This resolution builds upon the Resolution on Environmentally Responsible Investing that passed overwhelmingly at our Diocesan Convention in November 2013. We now extend that call for divestment and reinvestment to the Episcopal Church Pension Fund and the Episcopal Church Endowment Fund of the wider Episcopal Church. In so doing we will be joining other Episcopal dioceses with similar resolutions in an urgent call to divest and invest in clean renewable energy now for the sake of our fragile earth and future generations.

God calls us to be good stewards of creation (Gen. 1:31, 2:15), and Jesus commands us to care for those who are vulnerable as if we were caring for him (Mt. 25:40). Climate change is a titanic threat to all life forms planetwide. Among humans, the lives of the poorest are especially vulnerable. The biblical mandate and our church's teachings could not be clearer that we must respond with faithful, prophetic action. Climate change is, in profound ways, a matter of justice.

The Fifth Mark of Mission of the Anglican Communion is "To strive to safeguard the integrity of creation and sustain and renew the life of the earth." The Episcopal Church has long been on record calling for action to address climate change, and environmental justice, most recently with resolutions in 2006 and 2009.<sup>4</sup> The Episcopal Church, by its mission, is pledged to the protection and care of God's people and God's creation. As the climate crisis worsens, the church must increase the scope of its response. For over two decades, the Episcopal Church and the wider faith community have utilized shareholder and legislative advocacy on climate change, to very little effect.

A growing number of religious and educational institutions are committing to divest from fossil fuel holdings, having concluded that it is immoral to profit from an industry whose core business creates climate change and whose financial and political influence has prevented climate change legislation. In the past, under circumstances of grave harm combined with intransigent resistance to change by the offending industry or regime, the church has debated and/or divested from certain industries (tobacco) or from certain companies which support

<sup>3</sup> <http://fossilfreeindexes.com/the-carbon-underground-2014/>

<sup>4</sup> Resolution GC2009 - D031: Urge Commitment to Lower Carbon Output· Resolution GC2006 -B002: Acknowledge and Reduce Global Warming

repugnant regimes (South Africa). Such a time has arrived with the fossil fuel industry. Within the past two years, the United Church of Christ and the Unitarian Universalist Association have both voted to divest. The Presbyterian Church USA is studying divestment. The Anglican Church in Aotearoa, New Zealand and Polynesia, in May 2014, became the first Anglican body in the world to divest from fossil fuels. Union Theological Seminary and the University of Dayton, a Catholic University, voted to divest in June 2014.<sup>5</sup> The Diocese of Massachusetts adopted a divestment resolution in 2013. The Diocese of Western Massachusetts Trustees recently voted to begin divesting and reinvesting in renewable energy projects. Other dioceses, such as Newark and Oregon, are studying and considering divestment/reinvestment resolutions. Hundreds of churches nationwide are doing the same. The time has arrived for the Episcopal Church to take a leading role in the pre-eminent moral issue of our time.

### Divestment and Reinvestment as an Effective Investment Strategy

1. A vast majority of scientists and policymakers tell us that 70% of all fossil fuel reserves in the world must remain in the ground or else the atmosphere will rise more than 2 degrees centigrade causing irreparable damage to the earth and all life. For fiduciaries, the present condition and trajectory of the earth pose major portfolio risks. Prudence requires that they be well informed of these risks. Hence, a growing number of investment professionals are warning of a “carbon bubble,” that is, the over-valuation of companies depending solely on fossil fuels for their market value. The value of these “stranded assets” will plummet once governments strictly limit extraction, production and burning of fossil fuel to 30% of their reserves.<sup>6</sup>
2. Shareholder and legislative actions have been subverted in their efforts to change the fossil fuel industry’s business plan to extract and burn as much fossil fuel as they want and need. The fossil fuel industry spends \$400,000 a day while receiving billions in government subsidies. The divestment movement is successfully engaging and helping the public, public officials and institutions to enact needed energy policies sooner rather than later. The movement helps people see these companies as the major cause of climate change and holds them accountable for their actions.
3. Analyses have shown that eliminating fossil fuel industries from an investment portfolio over the past 20 years would have resulted in no reduction in returns.<sup>7</sup> This suggests that concerns about the risk to church investments posed by divestment may be overblown. In a January 29, 2014, article the New York Times indicated that 17 foundations that control nearly \$1.8 billion in investments have united and committed to pulling their money out of fossil fuel companies. The John Merck Fund had expressed concerns about the financial performance of their portfolio if they divested but were greatly pleased to learn that after divesting 97% of fossil fuel assets and reinvesting, their new investments were up 20% the next year.<sup>8</sup>
4. Divestment and reinvestment are critical political and economic strategies and forces for change. Divesting alone at this stage does not hurt fossil fuel companies economically. But reinvesting in clean renewable energy companies (“impact investments”) benefits the environment, creates jobs and a new economy that is life giving.

<sup>5</sup> For a current list of faith-based institutions that have divested or that are debating divestment, see <http://greenfaith.org/programs/divest-and-reinvest/listing-of-known-religious-divestment-efforts>

<sup>6</sup> [www.huffingtonpost.com/bevis-longstreth/the-financial-case-for-di\\_b\\_4203910.html...11/5/2013](http://www.huffingtonpost.com/bevis-longstreth/the-financial-case-for-di_b_4203910.html...11/5/2013)

<sup>7</sup> [http://www.aperiogroup.com/system/files/documents/building\\_a\\_carbon\\_free\\_portfolio.pdf](http://www.aperiogroup.com/system/files/documents/building_a_carbon_free_portfolio.pdf)

<sup>8</sup> <http://dealbook.nytimes.com/2014/0129/foundations-band-together-to-get-rid-of-fossil-fuel-investments/>

5. If the pressure brought about by divesting and reinvesting results in fossil fuel companies demonstrating a significant commitment to a clean, renewable energy future, then faith communities can re-invest and re-engage with them.
6. We believe that divesting is the most powerful and visible strategy available to us for moving the industry away from fossil fuels and reinvesting will hasten the development and utilization of clean energy. As a community of faith we can no longer profit from an industry whose current business plans will bring tragic consequences to God's creation. Divestment and reinvestment align our belief and values with our investment decisions. The time is now as we answer God's urgent call, together.

### Statements Against

Trustees and managers of pension and endowment funds have a fiduciary responsibility to maximize return and minimize risk. Eliminating equities from these portfolios may reduce return, and reinvesting in "impact investments" will result in higher management fees and may carry increased risk.

Divestment will not reduce the access of fossil fuel companies to capital and is therefore an ineffective method of combating climate change.

### Implementation Requirements

The Creation Care Task Force will expand its mission to facilitate the response of the Diocese to the 2013 resolutions by encouraging other dioceses and the Endowed Episcopal Parishes to engage in the topic of the 2014 resolution. Specifically, within the Task Force:

- The Divestment Group will work with Episcopalians for Fossil Fuel Divestment/Reinvestment to memorialize the 78<sup>th</sup> General Convention as stated in the fifth resolve of this resolution.
- The Education Group will include discussion of the 2014 resolution in the programs made available to individual congregations.
- The Advocacy Group will continue to work with other dioceses in discussing divestment/reinvestment issues.

## **4. Divestment from U.S. Companies Dealing with the West Bank Settlements**

Submitted by The Rev. Raymond Low and Ms. Joan Powers

**Resolved**, that this Diocesan Convention directs the Trustees of Donations to divest from their portfolios any shares of Caterpillar, Hewlett-Packard and Motorola Solutions; and be it further

**Resolved**, that the 229th Convention of the Diocese of Massachusetts submit the first resolve of this resolution to the 78th General Convention of the Episcopal Church.

### Explanation

The Presbyterian General Assembly this June voted "310 -303 to divest from three companies whose business practices the assembly determined are contributing to non-peaceful pursuits in Israel/Palestine. The companies are Caterpillar, Hewlett-Packard and Motorola Solutions. The assembly emphasized that the vote was not a vote to divest from Israel, and did not represent in any way endorsement of the more controversial BDS [boycott, divest, sanctions] Movement."

A sponsor of this resolution has been to the Holy Land on three different occasions and has seen and heard of the devastating effects the Israeli occupation has on the Palestinian inhabitants. Israeli “settlers” use six times the water as the local Palestinian villagers, who are increasingly deprived of their livelihood, and so forced to leave their homes. Jewish Voice for Peace, an organization of rabbis and Jewish laypeople, made presentations to the assembly delegates in favor of the resolution. This injustice cannot continue, and these companies should be held accountable for their enabling of the “settlements,” which the U.S. Government has called “road blocks to peace.”

#### Statement Against

Why single out Israeli settlements when the region has so many regimes which suppress dissent? Why single out these three companies only? This is a complex political issue in which the church should not be involved.

#### Implementation Requirements

The diocesan resources to carry out this resolution would be at most a few hours of time from the Trustees of Donations, and would not use any diocesan resources. The Diocese of Massachusetts deputation will oversee the forwarding of this resolution to the General Convention in 2015.



## A BRIEF SUMMARY OF ROBERT'S RULES OF ORDER

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**CONVENTION COMMITTEES**

2014

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

**Dispatch of Business**

Ms. Betsy Ridge Madsen  
 Mr. Patrick LaFortune

**Qualifications**

The Rev. Michael Hamilton  
 The Rev. Paula Toland  
 Ms. Suzette Phillips

**Constitution and Canons**

Ms. Rebecca Alden  
 The Rev. Therese Hoffman  
 The Rev. Kathryn Piccard

**Elections**

The Rev. Thomas Mousin  
 The Rev. Harry Walton  
 Ms. Claudette Hunt  
 Ms. Suzannah Perkinson

**Resolutions**

John Woodard, Esq.  
 The Rev. Holly Antolini  
 The Rev. Canon Edie Dolnikowski  
 The Rev. Meghan Sweeney

**Admission of Parishes and Missions**

The Rev. Regina Walton

**Convention Steering Committee**

Mr. Leon Brathwaite II  
 Ms. Ethel Crawford  
 Ms. Virginia Fuller  
 The Rev. Jane S. Gould  
 Ms. Claudette Hunt  
 The Rev. Edwin Johnson  
 The Rev. Canon Mally Lloyd  
 Mr. Lynd Matt  
 The Rev. Karen Montagno

Ms. Suzette Phillips  
 Mr. Lyle Pirnie  
 Mr. Jamie Reamer  
 The Rev. Sam Rodman  
 The Rev. Ema Rosero-Nordalm  
 The Very Rev. Jep Streit  
 Ms. Laura Simons  
 Ms. Tracy Sukraw  
 Mr. Chris Trahan

## Proposed 2015 Diocesan Budget

The 229th Annual Convention of the Episcopal Diocese of Massachusetts  
St. Stephen's Memorial Church, Lynn



### Statement of Mission

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

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

### Prayer for Mission

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

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## Episcopal Diocese of Massachusetts

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

Dear Friends in Christ,

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

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

The Budget Committee has had an exceptionally full agenda since the last Diocesan Convention, including ongoing oversight of the costs associated with the recent episcopal election; ongoing oversight of expenditures arising from the Together Now campaign; and the tasks required for the formation of the annual budget. This work has been completed in the midst of a time of transition in the senior leadership of the diocese and is based upon the expectation of essentially level funding for the coming year with no significant new initiatives.

In the coming year, we anticipate working closely with our new diocesan bishop and the Diocesan Council as we together strive to discern how we can most effectively direct the financial resources of the diocese.

We continue to welcome you to our monthly meetings at the diocesan offices at 138 Tremont Street in Boston and, as always, welcome your feedback, comments, observations and participation.

Faithfully yours,

Jim Gammill,  
Treasurer

The Rev. Stephen O. Voysey,  
Chairperson, Budget Committee

## Budget Overview

### Process

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

### **Core and Supplemental Budgets**

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

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

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

The basic definition of the core budget as limited to revenue from assessments, congregational contributions in lieu of assessment, regular spending policy draws from endowments and trusts and other predictable investment income continues to serve us well. These are truly the revenue streams enabled in a broader sense by the congregations of the diocese, and the spending side of the core budget forces us to identify the programs and activities that should be supported by these funds. The supplemental budget should capture all other spending that the diocese should claim as its own. Income and expenses from the Together Now campaign are reported on page 44.

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

MOVED, that the 229th Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2015 Diocesan Revenues, Core and Supplemental, described in the Proposed 2015 Diocesan Budget and summarized on pages 8 and 9, including the schedule of individual parish and mission assessments for 2015 listed on pages 11 through 14, with the adjustments approved by the Assessment Coordinating Committee and the Diocesan Council on page 15.

MOVED, that the 229th Annual Convention of the Episcopal Diocese of Massachusetts approve the Schedule of 2015 Diocesan Expenses, Core and Supplemental, described in the Proposed 2015 Diocesan Budget and summarized on pages 8 and 9.

### Summary of Core Budget

	2015 Budget	2014 Budget	Difference	2013 Actuals
<u>Revenues</u>				
Gross assessments	4,936,994	4,915,837	21,157	4,853,361
Less reserve	(60,000)	(100,000)	40,000	(50,000)
Less adjustments	(50,000)	(30,000)	(20,000)	(39,283)
Net assessments revenue	4,826,994	4,785,837	41,157	4,764,078
Trust fund draws	756,627	715,673	40,954	669,969
Agency fund draws	891,387	876,717	14,670	831,953
Congregational contributions	50,000	50,000	-	46,000
Interest income	21,510	20,168	1,342	20,056
Dividend income	62,075	60,000	2,075	73,953
Total revenue	6,608,593	6,508,395	100,198	6,406,009
Percentage change	1.5%			
<u>Expenses</u>				
Deaneries, congregations & clergy (1000's)	802,103	847,841	(45,738)	903,531
Congregational, resources and training (2000's)	1,065,580	1,069,598	(4,018)	969,002
Strategic ministries (3000's)	1,197,410	1,238,994	(41,584)	1,246,494
Episcopal and Diocesan support (4000's)	2,183,716	2,104,461	79,255	1,970,608
Administrative services (5000's)	1,359,784	1,247,501	112,283	1,316,374
	6,608,593	6,508,395	100,198	6,406,009
Net surplus (deficit)	-	-	-	-



## Summary of Supplemental Budget

		2015 Budget	2014 Budget	2013 Actuals
<b>Revenues</b>				
Distribution from closed parish net proceeds	{a}	196,163	213,550	157,500
Annual fund	{b}	326,000	326,000	258,000
Grants from Bishop's Discretionary Funds (BDF)	{c}	501,504	508,467	548,500
Other contributions and grant income	{d}	571,900	607,146	490,380
Total revenue		1,595,567	1,655,163	1,454,380
<b>Expenses</b>				
Deaneries, congregations & clergy (1000's)		100,656	134,900	122,409
Congregational, resources and training (2000's)		71,977	73,900	111,903
Strategic ministries (3000's)		1,235,095	1,251,422	917,747
Episcopal and Diocesan support (4000's)		187,839	194,941	302,321
Administrative services (5000's)		-	-	-
		1,595,567	1,655,163	1,454,380
Net surplus (deficit)		-	-	-
<b>Details of {a} through {d} revenue lines</b>				
		2015 Budget	2014 Budget	2013 Actuals
<b>{a} Distribution from Closed Parish Net Proceeds</b>				
Congregational program grants - Saugus		43,077	43,077	50,000
Watertown, Good Shepherd		60,000	70,000	70,000
Belmont funds, Urban resident		-	-	37,500
Brockton, Grace Chapel		93,086	93,550	-
	{a}	196,163	206,627	157,500
<b>{b} Annual fund allocation (gross)</b>				
Life together		115,000	125,000	105,500
B PEACE		50,000	40,000	-
B SAFE		125,000	125,000	100,000
Kids in Community - Lynn		10,000	10,000	15,000
Urban residents		-	-	37,500
Development (direct costs of annual fund)		26,000	26,000	-
	{b}	326,000	326,000	258,000
<b>{c} BDF Grants allocation</b>				
Sabbaticals		17,500	17,500	17,500
Continuing Education		10,000	10,000	8,000
Clergy dependent scholarships		34,244	35,000	43,000
Commission on Ministry		10,020	25,000	25,000
Clergy conference		-	10,000	10,000
Life Together		34,151	57,026	-
Kids in Community - Lynn		-	-	10,000
B SAFE		100,000	100,000	125,000
Dorchester, St. Mary's		50,000	20,000	-
Cathedral Church of St. Paul		65,000	65,000	60,000
Bishops' missions		-	26,000	-
Urban Resident		18,750	-	-
Development department		161,839	142,941	250,000
	{c}	501,504	508,467	548,500
<b>{d} Other contributions and grant income</b>				
Boston Cantonese fundraising		50,000	88,000	94,666
Other development contributions		-	92,846	-
Lilly grant to fund MED		25,000	25,000	35,000
Collections from Bsp visitations		7,000	10,000	6,560
Family Camp fees		18,900	13,900	18,900
Life Together fees and revenue		471,000	375,000	315,889
Trust fund draws		-	2,400	8,581
Jubilee grants/fundraising		-	-	10,784
	{d}	571,900	607,146	490,380

### Summary of Functional Expenses by Type

	2015		Core Budget 2014		2013	
	Budget	% of total	Budget	% of total	Actual	% of total
Program expenses	2,257,604	34%	2,353,871	36%	2,235,825	35%
Compensation and benefits	3,148,481	48%	2,862,876	44%	3,019,563	47%
Operational and support services	1,295,525	20%	1,268,425	19%	1,143,534	18%
Management and professional services	242,300	4%	244,723	4%	340,519	5%
<b>Total expenses</b>	<b>6,943,910</b>	<b>105%</b>	<b>6,729,895</b>	<b>103%</b>	<b>6,739,441</b>	<b>105%</b>
Less fees and other transfers	(335,317)	-5%	(221,500)	-3%	(333,432)	-5%
<b>Net functional expenses</b>	<b>6,608,593</b>	<b>100%</b>	<b>6,508,395</b>	<b>100%</b>	<b>6,406,009</b>	<b>100%</b>

	2015		Supplemental Budget 2014		2013	
	Budget	% of total	Budget	% of total	Actual	% of total
Program expenses	671,174	42%	924,450	56%	727,753	47%
Compensation and benefits	703,836	44%	609,073	37%	620,929	40%
Operational and support services	273,540	17%	413,440	25%	291,773	19%
Management and professional services	13,200	1%	1,200	0%	28,462	2%
<b>Total expenses</b>	<b>1,661,750</b>	<b>105%</b>	<b>1,948,163</b>	<b>118%</b>	<b>1,668,917</b>	<b>109%</b>
Add other transfers	(77,601)	-5%	(293,000)	-18%	(135,000)	-9%
<b>Net functional expenses</b>	<b>1,584,149</b>	<b>100%</b>	<b>1,655,163</b>	<b>100%</b>	<b>1,533,917</b>	<b>100%</b>

## 2015 ASSESSMENTS BY DEANERY

Key to selected columns:

*M?* "M" if a mission  
*EFFECTIVE RATE* the 2015 proposed assessment divided by the 2015 BASE, expressed as a percent  
*2014 ADJUSTMENT* the amount of an adjustment granted as part of the 2014 assessment review process

### ALEWIFE

M?	CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
2010	Arlington, Church of Our Saviour	9,737	9.6	101,534	10,380	0	-643
2015	Arlington, St. John's Church	20,522	12.0	171,111	21,666	0	-1,144
2025	Bedford, St. Paul's Church	21,019	12.1	174,318	19,551	0	1,468
2030	Belmont, All Saints' Church	25,170	12.5	201,097	22,006	0	3,164
2045	Burlington, St. Mark's Church	7,607	8.7	87,790	9,012	0	-1,405
2050	Cambridge, Christ Church	97,287	14.6	666,373	97,183	0	104
2055	Cambridge, St. Bartholomew's Church	19,377	11.8	163,729	17,873	0	1,504
2060	Cambridge, St. James's Church	41,683	13.5	307,635	49,647	0	-7,964
2065	Cambridge, St. Peter's Church	25,633	12.6	204,088	34,042	0	-8,409
2085	Lexington, Church of Our Redeemer	46,622	13.7	339,502	46,111	0	511
2135	Somerville, St. James's Church	6,593	8.1	81,248	4,108	0	2,485
2145	Waltham, Christ Church	22,032	12.2	180,857	19,697	0	2,335
2150	Watertown, Church of the Good Shepherd	8,551	9.1	93,879	8,818	0	-267
<b>TOTALS:</b>		<b>351,833</b>	<b>12.7</b>	<b>2,773,161</b>	<b>360,094</b>	<b>0</b>	<b>-8,261</b>

### BOSTON HARBOR

M?	CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
4035	Boston, Church of St. Augustine & St. Martin	12,515	10.5	119,456	11,796	0	719
4010	Boston, Church of the Advent	149,429	14.9	1,002,771	142,839	0	6,590
4025	Boston, Emmanuel Church	66,415	14.2	467,196	36,263	0	30,152
4070 M	Boston, St. Stephen's Church	1,658	3.0	54,761	794	0	864
4075	Boston, Trinity Church	381,656	15.3	2,501,010	358,850	0	22,806
1030	Charlestown, St. John's Church	18,300	11.7	156,777	19,127	0	-827
4055	Dorchester, St. Mark's Church	11,221	10.1	111,104	8,986	0	2,235
4060	Dorchester, St. Mary's Church	3,148	5.3	59,021	5,735	0	-2,587
3020	Jamaica Plain, St. John's Church	20,209	12.0	169,091	21,942	0	-1,733
4040	Roxbury, St. Cyprian's Church	20,463	9.5	142,450	16,080	0	4,383
4050	Roxbury, St. John St. James Church	7,235	8.5	85,388	9,645	0	-2,410
<b>TOTALS:</b>		<b>692,249</b>	<b>14.2</b>	<b>4,869,025</b>	<b>632,057</b>	<b>0</b>	<b>60,192</b>

### CAPE AND ISLANDS

M?	CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
6005	Barnstable, St. Mary's Church	61,111	14.1	432,977	60,493	0	618
6010	Buzzards Bay, St. Peter's Church	10,666	9.9	107,524	11,681	0	-1,015
6015	Chatham, St. Christopher's Church	69,651	14.3	488,072	72,779	0	-3,128
6020	Edgartown, St. Andrew's Church	37,954	13.4	283,579	36,074	0	1,880
6030	Falmouth, St. Barnabas's Church	65,499	14.2	461,287	65,433	0	66
6040	Harwich Port, Christ Church	35,416	13.3	267,204	36,772	0	-1,356
6045	Nantucket, St. Paul's Church	58,260	14.1	414,586	58,446	0	-186
6050	Oak Bluffs, Trinity Church	0	0.0	17,070	0	0	0
6055	Orleans, Church of the Holy Spirit	72,226	14.3	504,689	66,041	0	6,185
6060	Osterville, St. Peter's Church	52,220	13.9	375,613	56,209	0	-3,989
6065	Plymouth, Christ Church	50,908	13.9	367,151	39,521	0	11,387
6070	Provincetown, Church of St. Mary of the Harbor	19,893	11.9	167,054	19,632	0	261
6075	Sandwich, St. John's Church	38,454	13.4	286,802	36,486	0	1,968
6095	South Yarmouth, St. David's Church	23,450	12.3	190,006	30,896	0	-7,446
6080	Vineyard Haven, Grace Church	35,263	13.2	266,213	39,009	0	-3,746
6085	Wareham, Church of the Good Shepherd	26,419	12.6	209,158	25,747	0	672
6090	Wellfleet, St. James the Fisherman Church	0	0.0	16,536	0	0	0
6025	Woods Hole, Church of the Messiah	28,890	12.8	225,103	29,331	0	-441
<b>TOTALS:</b>		<b>686,280</b>	<b>13.5</b>	<b>5,080,624</b>	<b>684,550</b>	<b>0</b>	<b>1,730</b>

## 2015 ASSESSMENTS BY DEANERY

### CHARLES RIVER

M? CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
3120 Auburndale, Parish of the Messiah	9,008	9.3	96,826	11,744	0	-2,736
3030 Brookline, All Saints Parish	54,224	14.0	388,548	54,580	0	-356
3035 Brookline, Church of Our Saviour	45,765	13.7	333,968	43,774	0	1,991
3045 Brookline, St. Paul's Church	40,005	13.5	296,812	37,842	0	2,163
3125 Chestnut Hill, Church of the Redeemer	120,612	14.8	816,856	119,118	0	1,494
3060 Dover, St. Dunstan's Church	34,820	13.2	263,361	35,670	0	-850
3105 Needham, Christ Church	68,726	14.3	482,108	61,849	0	6,877
3145 Newton Centre, Trinity Church	36,862	13.3	276,530	34,887	0	1,975
3135 Newton Highlands, Parish of St. Paul	22,311	12.2	182,656	23,713	0	-1,402
3140 Newton Lower Falls, St. Mary's Church	49,733	13.8	359,568	46,367	0	3,366
3110 Newton, Grace Church	40,094	13.5	297,381	40,936	0	-842
3130 Newtonville, St. John's Church	12,921	10.6	122,074	13,148	0	-227
3115 Waban, Church of the Good Shepherd	50,147	13.8	362,240	49,013	0	1,134
3165 Wellesley, St. Andrew's Church	137,382	14.9	925,046	132,141	0	5,241
<b>TOTALS:</b>	<b>722,610</b>	<b>13.9</b>	<b>5,203,974</b>	<b>704,782</b>	<b>0</b>	<b>17,828</b>

### CONCORD RIVER

M? CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
2005 Acton, Church of the Good Shepherd	34,395	13.2	260,616	33,539	0	856
2020 Ayer, St. Andrew's Church	14,628	11.0	133,089	13,290	0	1,338
2075 Concord, Trinity Church	88,632	14.5	610,533	91,825	0	-3,193
3065 Framingham, St. Andrew's Church	34,040	13.2	258,329	32,918	0	1,122
3075 Holliston, St. Michael's Church	18,631	11.7	158,910	19,468	0	-837
3080 Hopkinton, St. Paul's Church	11,687	10.2	114,112	6,921	0	4,766
2080 Hudson, St. Luke's Church	3,691	5.9	62,525	4,676	0	-985
2090 Lincoln, St. Anne's in-the-Fields Church	74,395	14.3	518,683	80,015	0	-5,620
3100 Natick, St. Paul's Church	59,814	14.1	424,608	54,571	0	5,243
2125 Shirley, Trinity Chapel	2,939	5.1	57,676	0	0	2,939
3155 Southborough, St. Mark's Church	34,399	13.2	260,642	36,780	0	-2,381
2140 Sudbury, St. Elizabeth's Church	42,569	13.6	313,351	50,018	0	-7,449
2155 Wayland, Church of the Holy Spirit	32,497	13.1	248,371	30,403	0	2,094
2165 Weston, St. Peter's Church	56,402	14.0	402,595	64,000	0	-7,598
<b>TOTALS:</b>	<b>508,719</b>	<b>13.3</b>	<b>3,824,040</b>	<b>518,424</b>	<b>0</b>	<b>-9,705</b>

### MERRIMACK VALLEY

M? CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
1005 Amesbury, St. James's Church	11,560	10.2	113,295	13,825	0	-2,265
1010 Andover, Christ Church	76,964	14.4	535,254	73,796	0	3,168
2070 Chelmsford, All Saints' Church	34,325	13.2	260,166	34,521	0	-196
1055 Groveland, St. James's Church	15,630	11.2	139,554	13,930	0	1,700
1065 Haverhill, Trinity Church	19,530	11.9	164,712	27,599	0	-8,069
1075 Lawrence, Grace Church	13,458	10.7	125,538	14,789	0	-1,331
2095 Lowell, St. Anne's Church	28,712	12.8	223,954	29,446	0	-734
2100 Lowell, St. John's Church	2,883	5.0	57,314	2,553	0	330
1125 Methuen, St. Andrew's Church	2,823	5.0	56,929	2,617	0	206
1130 Newburyport, St. Paul's Church	41,453	13.5	306,154	37,661	0	3,792
1135 North Andover, St. Paul's Church	24,519	12.5	196,899	24,758	0	-239
2040 North Billerica, St. Anne's Church	24,067	12.4	193,986	21,981	0	2,086
1195 M West Newbury, All Saints' Church	4,958	5.7	86,698	9,234	0	-4,276
2160 Westford, St. Mark's Church	10,007	9.7	103,274	9,353	0	654
<b>TOTALS:</b>	<b>310,889</b>	<b>12.1</b>	<b>2,563,727</b>	<b>316,063</b>	<b>0</b>	<b>-5,174</b>

## 2015 ASSESSMENTS BY DEANERY

### MT HOPE BUZZARDS BAY

M? CHURCH		2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
5030	Fairhaven, Church of the Good Shepherd	0	0.0	34,130	0	0	0
5035	Fall River, Church of the Holy Spirit	32,434	13.1	247,962	35,032	0	-2,598
5045	Fall River, St. Luke's Church	0	0.0	22,752	0	0	0
5070	Marion, St. Gabriel's Church	48,723	13.8	353,053	47,292	0	1,431
5080	New Bedford, Grace Church	58,378	14.1	415,346	76,525	0	-18,147
5085	New Bedford, St. Andrew's Church	4,922	7.0	70,466	4,714	0	208
5090	New Bedford, St. Martin's Church	4,856	6.9	70,039	7,628	0	-2,772
5110	Somerset, Church of Our Saviour	13,215	10.7	123,974	10,066	0	3,149
5020	South Dartmouth, St. Peter's Church	1,746	3.5	49,975	3,425	0	-1,679
5115	Swansea, Christ Church	19,809	11.9	166,516	24,039	0	-4,230
<b>TOTALS:</b>		<b>184,083</b>	<b>11.8</b>	<b>1,554,213</b>	<b>208,721</b>	<b>0</b>	<b>-24,638</b>

### MYSTIC VALLEY

M? CHURCH		2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
1035 M	Chelsea, St. Luke's/San Lucas Church	5,310	5.9	90,100	4,907	0	403
1025 M	East Boston, Grace Church Federated	0	0.0	9,999	0	0	0
1045	Everett, Grace Church	3,035	5.2	58,291	7,443	0	-4,408
1095	Lynnfield, St. Paul's Church	17,074	11.5	148,866	19,630	0	-2,556
1105	Malden, St. Paul's Church	12,029	10.3	116,319	10,962	0	1,067
2115	Medford, Grace Church	37,734	13.4	282,158	37,126	0	608
1120	Melrose, Trinity Parish	25,122	12.5	200,791	24,539	0	583
1145	Reading, Church of the Good Shepherd	17,330	11.5	150,522	19,707	0	-2,377
1170	Saugus, St. John's Church	9,796	9.6	101,910	5,976	0	3,820
1175	Stoneham, All Saints' Church	4,341	6.5	66,721	3,345	0	996
1190	Wakefield, Emmanuel Church	17,797	11.6	153,534	16,037	0	1,760
2170	Wilmington, St. Elizabeth's Church	2,903	5.1	57,444	2,184	1,000	719
2175	Winchester, Parish of the Epiphany	89,911	14.5	618,787	88,878	0	1,033
1200	Winthrop, St. John's Church	11,320	10.1	111,743	11,417	0	-97
2180	Woburn, Trinity Church	7,017	8.4	83,981	4,300	1,648	2,717
<b>TOTALS:</b>		<b>260,719</b>	<b>11.6</b>	<b>2,251,166</b>	<b>256,451</b>	<b>2,648</b>	<b>4,268</b>

### NEPONSET RIVER

M? CHURCH		2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
4085	Canton, Trinity Church	15,936	11.3	141,523	16,171	0	-235
3050	Dedham, Church of the Good Shepherd	9,017	9.3	96,885	7,020	0	1,997
3055	Dedham, St. Paul's Church	44,379	13.7	325,028	42,818	0	1,561
4015	Dorchester, Parish of All Saints	50,590	13.9	365,102	48,322	0	2,268
3005	Hyde Park, Christ Church	3,700	5.9	62,581	7,471	0	-3,771
3015 M	Hyde Park, Iglesia de San Juan	0	0.0	8,378	0	0	0
4030	Mattapan, Church of the Holy Spirit	20,824	12.0	173,062	20,353	0	471
3085	Medfield, Church of the Advent	27,480	12.7	216,002	19,748	0	7,732
3090	Medway, Christ Church	5,400	7.3	73,552	5,914	0	-514
4130	Milton, St. Michael's Church	63,533	14.2	448,605	66,522	0	-2,989
3150	Norwood, Grace Church	11,242	10.1	111,244	10,020	0	1,222
5105	Sharon, St. John's Church	2,210	4.2	52,968	0	0	2,210
4160	Stoughton, Trinity Church	6,009	7.8	77,481	8,664	0	-2,655
3160	Walpole, Epiphany Church	24,207	12.4	194,890	20,312	0	3,895
3010	West Roxbury, Emmanuel Church	4,168	6.4	65,606	4,725	0	-557
3170	Westwood, St. John's Church	13,548	10.7	126,122	17,241	0	-3,693
<b>TOTALS:</b>		<b>302,243</b>	<b>11.9</b>	<b>2,539,029</b>	<b>295,301</b>	<b>0</b>	<b>6,942</b>

## 2015 ASSESSMENTS BY DEANERY

## NORTH SHORE

M? CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
1015 Beverly Farms, St. John's Church	74,616	14.3	520,107	73,909	0	707
1021 Beverly, St. Peter's Church	28,783	12.8	224,408	30,442	0	-1,659
1143 Danvers, All Saints	18,025	11.6	155,000	13,027	0	4,998
1050 Gloucester, St. John's Church	25,185	12.5	201,195	25,427	0	-242
1070 Ipswich, Ascension Memorial Church	29,125	12.9	226,617	27,115	0	2,010
1090 Lynn, St. Stephen's Memorial Episcopal Church	38,822	13.4	289,177	36,563	0	2,259
1116 Marblehead, St. Michael's Church	37,753	13.4	282,280	38,660	0	-907
1110 Marblehead, Wyman Memorial Church of St. An	33,808	13.2	256,832	43,734	0	-9,926
1155 Rockport, St. Mary's Church	18,822	11.8	160,148	18,187	0	635
1160 Salem, Grace Church	22,698	12.3	185,151	26,025	0	-3,327
1165 Salem, St. Peter's Church	11,460	10.2	112,648	19,308	0	-7,848
1060 South Hamilton, Christ Church	45,779	13.7	334,062	46,578	0	-799
1180 Swampscott, Church of the Holy Name	14,453	11.0	131,960	17,266	0	-2,813
1185 Topsfield, Trinity Church	28,566	12.8	223,012	28,014	0	552
<b>TOTALS:</b>	<b>427,895</b>	<b>13.0</b>	<b>3,302,597</b>	<b>444,255</b>	<b>0</b>	<b>-16,360</b>

## SOUTH SHORE

M? CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
4080 Braintree, Emmanuel Church	11,899	10.3	115,479	11,460	0	439
4090 Cohasset, St. Stephen's Church	48,081	13.8	348,912	48,881	0	-800
4095 Duxbury, Church of St. John the Evangelist	45,269	13.7	330,772	45,755	0	-486
4100 Hanover, St. Andrew's Church	22,382	12.2	183,110	21,237	0	1,145
4105 Hingham, Parish of St. John the Evangelist	71,742	14.3	501,567	71,348	0	394
4110 Holbrook, St. John's Church	5,147	7.2	71,921	6,263	0	-1,116
4120 Marshfield, Trinity Church	16,492	11.4	145,111	17,565	0	-1,073
4125 Milton, Church of Our Saviour	14,343	10.9	131,246	11,912	0	2,431
4135 Quincy, Christ Church	16,838	11.4	147,344	18,836	0	-1,998
4140 Quincy, Parish of St. Chrysostom	18,871	11.8	160,464	18,701	0	170
4145 Randolph, Trinity Church	7,352	8.5	86,147	6,808	0	544
4150 Rockland, Trinity Church	5,773	7.6	75,960	4,434	0	1,339
4155 Scituate, St. Luke's Church	41,261	13.5	304,911	32,335	0	8,926
4165 South Weymouth, Church of the Holy Nativity	14,055	10.9	129,388	17,756	0	-3,701
5130 Whitman, All Saints' Church	7,309	8.5	85,869	7,238	0	71
<b>TOTALS:</b>	<b>346,814</b>	<b>12.3</b>	<b>2,818,201</b>	<b>340,529</b>	<b>0</b>	<b>6,285</b>

## TAUNTON RIVER

M? CHURCH	2015 FORMULA ASSESSMENT	EFFECTIVE RATE	2015 BASE	2014 ASSESSMENT	2014 ADJUSTMENT	DIFFERENCE
5005 Attleborough, All Saints' Church	5,544	7.4	74,483	3,818	1,138	1,726
5010 Bridgewater, Trinity Church	9,760	9.6	101,678	8,217	0	1,543
5060 Foxborough, St. Mark's Church	21,684	12.1	178,611	12,306	10,000	9,378
3070 Franklin, St. John's Church	10,597	9.9	107,080	9,915	0	682
5065 Mansfield, Church of St. John the Evangelist	2,233	4.2	53,122	2,946	0	-713
5075 Middleborough, Church of Our Saviour	15,814	11.2	140,739	15,548	0	266
5095 North Attleborough, Grace Church	23,253	12.3	188,731	21,642	0	1,611
5025 North Easton, St. Mark's Church	0	0.0	35,618	902	0	-902
5120 Taunton, St. John's Church	4,792	6.9	69,630	4,971	0	-179
5125 Taunton, St. Thomas's Church	28,802	12.8	224,533	31,981	0	-3,179
3175 Wrentham, Trinity Church	20,181	11.9	168,912	18,728	0	1,453
<b>TOTALS:</b>	<b>142,660</b>	<b>10.6</b>	<b>1,343,137</b>	<b>130,974</b>	<b>11,138</b>	<b>11,686</b>

**DIOCESAN TOTALS: 4,936,994 13.0 38,122,894 4,892,201 13,786 44,793**

less RESERVES -60,000

less reserve assessment adjustments -50,000

**ASSESSMENTS less reserves & adjustments 4,826,994**

## Projected Revenue for 2015

### Assessments and Adjustments and Reserves

The 2015 assessment formula, approved by the Diocesan Council, remains unchanged from 2010:

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

where the BASE for 2015 is equal to line 14 (“all other operating expenses”) from the 2012 parochial report, less line 7 (“assistance from diocese”).

For a mission, the 2015 assessment is two-thirds the amount that would be assessed if the congregation were a parish.

This assessment formula together with the parochial report data for 2012 generates a gross assessment for 2015 of \$4,939,756. Again this year the Diocesan Council created an Assessment Coordinating Committee, whose adjustments to the assessments of six congregations totaled \$31,975, below its authorized cap of \$50,000, as follows:

- All Saints’ Church, Attleboro: \$1,275
- St. Mark’s Church, Foxboro: \$8,000
- St. Paul’s Church, Hopkinton: \$6,000
- St. Anne’s Church, Lowell: \$5,000
- St. Paul’s Church, Malden: \$5,000
- Grace Church, Salem: \$6,700

However, despite coming in below the authorized cap, we have chosen to have the adjustments amount total \$50,000. In addition to the \$31,975 in adjustments, \$12,000 in reduced assessment income resulting from the Bristol Trinity merger is taken from this total. In sum, the total value of assessments to be billed in 2015 (after adjustments and less a reserve of \$60,000) is \$4,826,994. In addition to the assessments, revenue also reflects \$50,000 in projected voluntary contributions from two congregations not subject to the assessment.

### Net Revenue from Investments

Approximately 25% of core budget revenue comes in the form of spending policy draws from investments, either owned directly by the diocese (including our endowment funds), or owned by others (usually the Trustees of Donations) in trust for the benefit of the diocese. Some funds, whether owned by the diocese or by a trust, place no restriction on the diocese regarding the use of the income provided through the spending policy draws. The unrestricted funds represent about 30% of the available spending policy income. The remaining funds have some restriction on the use of the spending policy income, but in most cases the restriction is consistent with the regularly anticipated expenses of the diocese. There are a few funds, however, where the restrictions call for close monitoring and measurement.

### Spending Policy – Trusts

The appendix table on page 48 lists the trusts owned and managed by the Trustees of Donations (TOD) for the benefit of the diocese. In 2015 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 2011 through June 2014.

There are a few funds with restrictions that require the TOD to deviate from the general spending policy formula. In some cases, the distribution is limited to actual income produced by the fund, and in other cases, all income must be reinvested for the time being. The table of projected trust income for these funds is an estimate of the income that will be available in 2015.

The total spending policy income available in 2015 (\$756,627) is a slight increase from 2014 (\$715,673). This is because three-year average market values are roughly the same for the two overlapping periods.

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

The appendix table on page 47 lists the endowments owned by the diocese and managed primarily by the Trustees of Donations. These include some funds that are unrestricted and others that have a restriction on their use as stipulated by a third party donor at the time the trust was created or stipulated by Diocesan Council.

The proposed spending policy for 2015 is similar to that adopted by the Trustees of Donations: to draw 4% of a base that reflects the average of the market value over the past three years, adjusted for withdrawals from and additions to principal.

The total spending policy income available to the 2015 core budget is \$891,387 which is about \$15,000 more than in 2014.

#### Spending Policy and Core Revenue

Over the summer, the Financial Advisory Committee affirmed the following:

*The Financial Advisory Committee reaffirms its support of a 4% spending policy draw from diocesan endowment funds to support the 2015 core budget. (The value of each fund for the purpose of calculating the draw is based on the 36 month average, from July 2011 to June 2014, of end of month market value, adjusted for additions and withdrawals.)*

At the same time, Council has unrestricted access to several funds in the endowment; both principal and income can be spent as long as Council approves. Such draws above and beyond the normal 4% draw are treated as supplemental, not core, revenue, thus flagging them as special actions in response to special circumstances. A notable supplemental draw has been taken to cover the expenses of the election of and transition to a new diocesan bishop.

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

It is possible that some future supplemental draw on the endowment could be needed if actual diocesan operations run at a significant deficit. Ideally, setting sufficient levels of reserves for adverse outcomes and maintaining strong financial controls throughout the year will prevent this type of supplemental draw. To that end, the 2015 budget adds two reserves, one for major purchases (cost center 5000) and one for capital improvements (cost center 5141). These are in addition to the existing reserves for General Convention and episcopal elections.

#### Dividend and Interest Income

More than 40 years ago the diocese received a gift of stock with the request that it not be sold. The dividend income for 2015 is projected to be \$62,075. In addition, the inclusion of \$21,510 in interest income represents the income to be earned and collected on a mortgage extended to the bishop suffragan and has an interest rate of 5.2%.

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



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

- St. David's Church, Pepperell (outstanding amount: \$38,935): The St. David's property and buildings are currently for sale. Proceeds from the sale will repay the loan.
- St. Elizabeth's Church, Wilmington (outstanding amount: \$4,803)

A third congregation, Grace Church, North Attleborough, entered into an agreement with the Diocesan Council which involves certain financial and operational incentives in order for the parish to achieve certain milestones. During 2012 Grace Church began repayment of its outstanding loan amount of \$385,393 under this plan. Payments are recorded as a reduction of existing assets. In 2013, the parish paid approximately \$73,004, which resulted in an additional credit of \$23,852 to its balance.

### Supplemental Budget Revenue

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

**{a}** Closed Parish Net Proceeds Fund (Use of Proceeds from Sales of Closed Parishes): The 2015 draw will be \$103,077 to cover congregational grants. Further grants may be voted by Diocesan Council throughout the year in keeping with its policy. An amount of \$93,086 is allocated to Grace Chapel in Brockton outside of the Diocesan Council process. The 2014 budget drew \$206,627 from this fund. See pages 40 and 41 for further information.

**{b}** The Annual Fund: The 2015 Annual Fund goal is set at \$326,000 to cover strategic ministries serving children, youth and young adults. With \$26,000 needed to cover the direct costs of the Annual Fund, \$300,000 is likely to be available for Annual Fund grants in 2015, the same as was budgeted for 2014.

**{c}** Grants from Bishop's Discretionary Funds (BDFs): These are trust funds held by the Trustees of Donations where the bishop and the diocese are named as income beneficiaries; some are restricted in use and some are not. The generosity of past donors and the diocesan bishop make it possible to fund new ventures in mission and strategic ministries through the supplemental budget. In 2015 the draw, along with use of prior years' accumulated surpluses, is set at \$501,504 for clergy support and development (from restricted funds), the development office and various strategic ministries; in 2014 the draw was \$508,467. If the Annual Fund comes in above \$326,000, then the grants from the BDFs will be reduced so the reserve is not further depleted.

Of the many funds owned by the Trustees of Donations, 34 funds with a market value of about \$19.4 million are for the benefit of the diocesan bishop, and the Trustees of Donations provide him with an annual spending policy from these trusts. In 2015, Bishop Gates will continue Bishop Shaw's practice of using the bulk of this income to support pilot programs and new initiatives and to supplement strategic ministries. The grants (which comprise about 38% of the overall supplemental budget) are an important source of funding for the supplemental budget. Planned expenditures over the past few years have brought prior years' surplus levels down.

**{d}** Other contributions and grants: Fundraising by the Cantonese ministry, grants and fees make up this category. In 2015 the budget amounts to \$571,900; in 2014 it was budgeted at \$607,146.

### Real Property Spending Policy

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

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

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

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

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

The **Congregational Resources and Training** area includes grant programs, events, training and communications. A new communications assistant position was hired in 2014. An administrator for the grants programs continues to support the congregational resources and training director as the “green” grants and mission tithe grants programs expand under the Together Now campaign funding.

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

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

In the **Administrative Services** area, a new chief business officer will join the Treasurer’s Office to oversee financial services, human resources and information technology.

## Projected Expenses for 2015 by Areas of Operation

### Guide to Area Expense Tables

The proposed expense budgets for each of the five areas of diocesan operations are described in this section. For each area, there are two pages, one for the core budget and one for the supplemental budget. Each page has two tables: 2013 actuals (top) and the 2015 proposed budget (bottom). The far right-hand column is the 2014 budget for comparative purposes. Each row represents a specific cost center code and description within the area. There are up to 10 columns of figures that include a variety of budgeted and actual expenses. The first row in each area is staff compensation.

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

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

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

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

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

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

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

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

**2014 Budget:** The 2014 budget, for comparison purposes

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

The total 2015 budget for this area is \$902,759 with \$802,103 in the core budget and \$100,656 in the supplemental budget. The 2014 core budget total was \$847,841. Specific amounts in this area have been reallocated at the request of staff who oversee the budget.

Deaneries, Congregations and Clergy: 1000 - Core

This line contains the total compensation costs for five staff members (see roster on page 53).

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

\$500 per deanery to support deanery assembly activities; \$4,000 per deanery to offset deans' time and expense; and \$15,000, an increase of \$8,000 from 2014, to provide hospitality for Confirmations which are not being held at the cathedral during its reconstruction.

Congregations: 1101 - Core & Supplemental

The \$3,300 in the core budget, down from \$4,800 in 2014 at the suggestion of staff, funds the congregational business consultants program; \$25,000 in the supplemental budget is a grant from the Lilly Foundation for mentoring of newly ordained clergy.

Transition Ministries: 1111 - Core

\$10,000, down from \$13,000 in 2014 to reflect actuals, for supporting expenses for the Office of Transition Ministries. Other expenses reallocated at request of staff.

Clergy: 1201 - Core

\$1,500, down from \$3,000 in 2014 at request of staff, for the expenses of the two archdeacons.

Sabbaticals: 1211 - Core & Supplemental

\$25,703 funded from the Bishop's Discretionary Fund; \$8,203 is transferred to the core budget.

Continuing Education: 1212 - Supplemental

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

MSASA EDS: 1213 - Core

\$10,341 is the spending policy income available for a scholarship program for students from Africa attending Episcopal Divinity School.

Clergy Dependent Scholarships: 1221 - Supplemental

\$31,228 from the Bishop's Discretionary Fund.

Dill Campership: 1223 - Supplemental

\$3,016 representing the spending policy income from a restricted bishop's discretionary fund to support a scholarship to Camp O-At-Ka in Maine.

Support for Retired Clergy: 1231 - Core

\$5,300 for program and support expenses for retired clergy, including gatherings, is transferred from the supplemental to core budget. In addition, the Society for the Relief of Aged or Disabled Episcopal Clergy and the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Episcopal Church both receive distributions from agency funds as well as from trust funds where the organizations are named as income beneficiaries. These distributions help retired

clergy and widows, widowers and orphans of clergy. The books and records of these two organizations, because they are separate 501(c)(3) organizations, are not part of the diocesan budget.

Commission on Ministry: 1311 - Core

The total cost for this program is budgeted at \$67,000. Funds have not been set aside for the Commission on Ministry's priority to fund seminarians whose first language is not English.

Seminarians: 1312 - Core & Supplemental

Scholarships for seminarians in the ordination process—\$50,292 is the spending policy income from a restricted fund for this purpose, supplemented by an estimated additional \$7,000 to be raised through the collections at the bishops' visitations to congregations and \$612 from a small fund in the supplemental budget.

Fresh Start Program: 1321 - Core

A decrease of \$1,500 to \$3,500 in 2015, based on 2013 actuals.

Diaconate Program: 1331 - Core

The full cost of running the diaconate program has decreased by \$3,500 from 2014 to \$16,500, based on the projected participation.

Clergy Family Network: 1341 - Core & Supplemental

\$1,000 in the core budget, based on 2013 actuals.

Pre-Lenten Retreat: 1411 - Core

Net costs to the core budget, after fees are budgeted at \$3,000, based on 2013 actuals.

Clergy Conference: 1421 - Core & Supplemental

This three-day event is budgeted at \$100,000, of which \$61,000 is covered by attendee fees; the balance (\$42,000) is covered by the core budget.

Clergy Day: 1431 - Core

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

**Deaneries, Congregations & Clergy  
2015 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2013 Actual</b>							
CC1000 Deaneries, Congregations & Clergy	-	614,548	804	-	-	-	615,352
CC1001 Deaneries	-	-	3,361	-	-	-	3,361
CC1002 Deans	48,000	-	-	-	-	-	48,000
CC1003 Deanery Confirmations	9,756	250	3,521	-	-	-	13,527
CC1101 Congregations	-	1,000	3,965	2,240	(723)	-	6,482
CC1111 Transition Ministries	20,000	-	6,921	-	(4,175)	-	22,746
CC1201 Clergy	-	-	492	4,840	(1,000)	-	4,332
CC1201 Sabbaticals	7,431	-	300	-	-	-	7,731
CC1213 MSASA EDS	5,500	-	-	-	-	-	5,500
CC1213 Support for Retired Clergy	-	-	4,269	-	-	-	4,269
CC1311 Commission on Ministry	36,853	30,090	24,453	9,851	(16,760)	(25,000)	59,487
CC1312 Seminarians	67,475	520	-	-	-	-	67,995
CC1321 Fresh Start Program	-	150	2,625	-	-	-	2,775
CC1331 Diaconate Program	119	8,200	10,727	-	(9,000)	-	10,046
CC1341 Clergy Family Network	-	-	113	-	-	-	113
CC1411 Pre Lenten Retreat	508	-	5,601	2,035	(4,070)	-	4,074
CC1421 Clergy Conference	469	3,500	79,563	591	(61,014)	4,295	27,404
CC1431 Clergy Day	-	-	6,047	50	(5,760)	-	337
<b>Totals</b>	<b>196,111</b>	<b>658,258</b>	<b>152,762</b>	<b>19,607</b>	<b>(102,502)</b>	<b>(20,705)</b>	<b>903,531</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2015 Budget</b>							
CC1000 Deaneries, Congregations & Clergy	-	516,467	-	-	-	-	516,467
CC1001 Deaneries	-	-	6,000	-	-	-	6,000
CC1002 Deans	48,000	-	-	-	-	-	48,000
CC1003 Deanery Confirmations	15,000	-	-	-	-	-	15,000
CC1101 Congregations	-	-	2,000	2,100	(800)	-	3,300
CC1111 Transition Ministries	-	-	10,000	-	-	-	10,000
CC1201 Clergy	-	-	1,500	3,000	(3,000)	-	1,500
CC1211 Sabbaticals	-	-	-	-	-	8,203	8,203
CC1213 MSASA EDS	10,341	-	-	-	-	-	10,341
CC1231 Support for Retired Clergy	5,300	-	-	-	-	(5,300)	-
CC1311 Commission on Ministry	10,000	28,000	27,000	15,000	(13,000)	-	67,000
CC1312 Seminarians	57,904	-	-	-	-	(7,612)	50,292
CC1321 Fresh Start Program	-	5,500	3,500	3,000	(2,000)	-	3,500
CC1331 Diaconate Program	-	-	10,000	-	-	-	10,000
CC1341 Clergy Family Network	1,000	-	-	-	-	(1,000)	-
CC1411 Pre Lenten Retreat	-	-	4,600	1,800	(3,400)	-	3,000
CC1421 Clergy Conference	-	2,000	100,000	1,000	(61,000)	-	42,000
CC1431 Clergy Day	6,000	-	-	-	(5,000)	-	1,000
<b>Totals</b>	<b>153,545</b>	<b>551,967</b>	<b>164,600</b>	<b>25,900</b>	<b>(88,200)</b>	<b>(5,709)</b>	<b>802,103</b>





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

The total 2015 budget for this area is \$1,137,557, with \$1,065,580 in the core budget and \$71,977 in the supplemental budget. The 2014 core budget total was \$1,069,598.

Congregational Resources and Training: 2000 - Core

The total compensation and benefits costs for the seven staff members in this area are \$437,559 (see roster on page 53). Fifty percent of the compensation costs for the staff member who works closely with congregations during the closing process is ultimately reimbursed from the closing proceeds. A new position in 2013, grants administrator and support to the congregational development team, is being partially funded from the Together Now campaign and partially from the Congregational Resources and Training core budget to administer the overall diocesan and campaign grants which total approximately \$850,000 per year, and to provide administrative support to the congregational development team, especially in the area of event planning.

Congregational Development Grants: 2011, 2012 - Core

The amounts for the two congregational development grant programs has been reduced by \$40,000 due to decrease in demand, to \$150,000 for the open grants and \$60,000 for the targeted grants.

Bristol County Case Grants: 2013 - Core

The draw for this grant program is \$123,207. The intended uses of the fund's income when it was established as part of the diocesan endowment include service to Bristol County residents in need, as well as the general and religious purposes of the diocese.

Congregational Program Grants: 2014 - Core & Supplemental

This cost center line contains specific grants to congregations funded either by restricted funds or specific supplemental sources. In the core budget, beneficiaries of specific trusts include: St. John's, Sharon (\$19,312); Christ Church, Plymouth (\$2,160); Emmanuel Church, West Roxbury (\$3,688); and Emmanuel Church, Boston (\$6,866). In the supplemental budget, the net of \$53,077 includes the final draw from the closed church proceeds (Malden) for use by St. John's, Saugus (\$43,077), and \$10,000 to St. Stephen's, Lynn for its KIDS in Community summer program.

Deaf Ministry Grants: 2015 - Core

This cost center represents a continuation, for the time being, of the deaf ministry grants program begun in 2011. The amount budgeted is a draw from the remainder of the diocesan agency fund that in previous years supported the St. Andrew's of the Deaf congregation in Natick, which closed in 2011. It has increased to \$8,000 reflecting increasing demand. The use of the proceeds from this closed congregation will be determined by Diocesan Council.

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

Each of the 12 deaneries is charged with running a grants program to support outreach activities. Deanery assemblies set the criteria and determine awards. The amounts available to each deanery, funded by two specific diocesan funds, are \$4,000 for Sending Serving grants (open to any outreach activity) and \$2,540 for House of Mercy grants (requiring a focus on women and children in need).

Hispanic Ministries: 2031 - Core

The 2015 budget for this grant program to support Hispanic ministries in congregations is \$25,000. An additional \$10,000 pays for the Hispanic missionary.

Green Grants and Loans: 2052 – Together Now Campaign

The 2015 "green" grants and loan programs will be funded through the Together Now campaign (see page 42).



Spring Learning Event: 2112 - Core

The core budget for 2015 is \$5,000, with \$500 in participant fees, for a net expense of \$4,500.

Resource Day: 2113 - Core

The total cost of Resource Day is \$5,000, \$3,500 of which is offset by fees collected.

Workshops: 2131 - Core

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

Antiracism: 2132 - Core

\$3,000 in this cost center reflects a new focus on antiracism activities.

Safe Church: 2133 - Core

A net of \$5,000 for trainings, online and in person, based on 2013 actuals.

Resource Center: 2151 - Core

\$500 to stock and renew the materials in the Resource Center staffed by the missionary for Christian education, formation and discipleship.

Consultants and Coaches: 2161 - Core

\$18,000 for congregational consultants and coaches and their compensation and expenses. They help with best practices in many areas including: finances, buildings, leadership and stewardship.

Congregational Resources and Training Support: 2200 - Core

Program support in this line has been allocated to other cost centers.

Congregational Support: 2211 - Core

Much of this total of \$9,000 is legal fees on various parish-related issues throughout the year as well as travel and hospitality for the congregational development team.

Program Support: 2221 - Core

A net of \$33,000 covers various workshop training programs as well as a grant to the Leadership Development Initiative.

Family Camp: 2222 - Supplemental

Family Camp is a break-even operation.

Committee Support: 2231 - Core

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

Communications: 2311, 2312 - Core

The total budget is \$52,000, a reduction of \$25,000 which reflects expected spending and 2013 actuals. The cost of printing and mailing the FYI bulletin to those without e-mail is \$2,000.

**Congregational Resources & Training  
2015 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<b>2013 Actuals</b>						
CC2000 Congregational Resources & Training	-	391,913	-	-	-	391,913
CC2011 Cong Dev Open Grants	210,208	-	-	-	(1,000)	209,208
CC2012 Cong Dev Targeted Grants	47,688	-	-	-	-	47,688
CC2013 Bristol County Case Fund Grants	111,029	-	29	-	-	111,029
CC2015 Deaf Ministry Grants	4,900	-	-	-	-	4,900
CC2021 Sending Serving Grants	33,473	-	-	-	-	33,473
CC2022 House of Mercy Grants	25,180	-	-	-	-	25,180
CC2031 Hispanic Ministries	25,000	10,765	7	-	(167)	35,605
CC2111 Events	-	-	-	-	-	-
CC2112 Spring Learning Event	3,099	1,200	1,736	42	(2,824)	3,253
CC2113 Resource Day	9,913	450	2,500	27	(1,130)	11,760
CC2130 Events	-	485	-	-	-	485
CC2131 Workshops	1,723	-	387	24	(3,345)	(1,211)
CC2132 Anti-Racism	88	-	477	-	(2,800)	(2,235)
CC2133 Safe Church	-	5,763	2,526	7	(3,157)	5,139
CC2151 Resource Center	-	-	239	3	(50)	192
CC2161 Consultants and Coaches	-	11,950	6,578	-	-	18,528
CC2171 Practice Areas	14	350	152	-	-	516
CC2200 CRT Support	32,020	-	1,815	16,861	-	33,835
CC2211 Congregation Support	5,437	2,685	2,910	-	(2,420)	8,612
CC2221 Program Support	128	-	4,384	-	-	4,512
CC2231 Committee Support	1,393	3,233	25,133	-	(30,585)	(826)
CC2312 Diocesan Communications	-	-	1,770	-	-	1,770
<b>Totals</b>	<b>511,264</b>	<b>428,794</b>	<b>59,458</b>	<b>16,964</b>	<b>(47,478)</b>	<b>969,002</b>
<b>2015 Budget</b>						
CC2000 Congregational Resources & Training	-	437,559	-	-	-	437,559
CC2011 Cong Dev Open Grants	150,000	-	-	-	-	150,000
CC2012 Cong Dev Targeted Grants	60,000	-	-	-	-	60,000
CC2013 Bristol County Case Fund Grants	123,207	-	-	-	-	123,207
CC2014 Congregational Program Grants	32,826	-	-	-	-	32,826
CC2015 Deaf Ministry Grants	8,000	-	-	-	-	8,000
CC2021 Sending Serving Grants	48,000	-	-	-	-	48,000
CC2022 House of Mercy Grants	30,488	-	-	-	-	30,488
CC2031 Hispanic Ministries	25,000	10,000	-	-	-	35,000
CC2112 Spring Learning Event	3,000	1,000	2,000	-	(500)	6,000
CC2113 Resource Day	4,000	-	-	-	(3,500)	2,500
CC2131 Workshops	7,500	-	500	-	(4,000)	4,000
CC2132 Anti-Racism	3,000	-	-	-	-	3,000
CC2133 Safe Church	-	4,000	2,500	-	(1,500)	5,000
CC2151 Resource Center	-	-	500	-	-	500
CC2161 Congregational Consultants	500	1,000	16,500	-	-	18,000
CC2200 CRT Support	-	-	-	-	-	-
CC2211 Congregation Support	-	500	3,500	5,000	-	9,000
CC2221 Program Support	33,000	1,500	500	-	(2,000)	33,000
CC2231 Committee Support	-	-	10,000	-	-	10,000
CC2311 Diocesan Communications	-	-	50,000	-	-	50,000
CC2312 FYI Newsletter	-	-	2,000	-	-	2,000
<b>Totals</b>	<b>528,521</b>	<b>455,559</b>	<b>88,000</b>	<b>5,000</b>	<b>(11,500)</b>	<b>1,069,598</b>



Strategic Ministries (see tables on pages 32 and 33)

The total 2015 budget for this area is \$2,432,505, with \$1,197,410 in the core budget and \$1,235,095 in the supplemental budget. The 2014 core budget total was \$1,238,994.

Strategic Ministries: 3000

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

Youth Ministry: 3011, 3012 - Core

The core budget for the diocesan youth ministry includes the compensation and benefits for the director of youth ministry plus \$63,000 for program and support expenses, net of \$36,000 in fees collected. The Youth Leadership Academy is self-funded.

Life Together: 3056 - Core & Supplemental

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

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

In the 2014-2015 program year, Life Together will host 26 young adults in five intentional communities across eastern Massachusetts:

- Micah Fellows are first-year fellows based in the greater-Boston area.
- Emmaus Fellows are second-year fellows based in the greater-Boston area. This cohort is focused on deepening the capacity of site partners and deepening the individual formation of the fellows.
- Esperanza Academy Teaching Fellows—This is a partnership between Life Together and Esperanza Academy, located in Lawrence, focused on training teachers and leaders who want to work for change through the education system. The Esperanza Academy Teaching Fellows teach classes, work and coach in the extended-day program of the school as well as joining the Boston fellows for monthly leadership trainings, and they live together in intentional community.
- South Coast Mission Hub Fellows—Funded by the Together Now campaign, this is an affiliate program partner with Life Together. The South Coast Mission Hub is a pilot project of the diocese to bring together local churches and engage them in common missional work. The fellows live in Fall River and work at nonprofit organizations and churches in the greater Fall River and New Bedford communities.

Funding:

Originally, the diocesan young adult intern program was fully funded by the diocese—including \$75,000 from the core budget. Supplemental resources, including external grants and contributions, and internal grants from Annual Fund proceeds and from the bishop's discretionary funds provided the bulk of additional funding.

Over the past four years, however, 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 \$680,000. The plan for securing the needed revenue is:

- Site fees of \$245,000 (an average of \$9,500 per intern)
- External grants totaling \$95,000

- Annual fundraising campaign and event led by staff and fellows to net \$45,000
- Consulting fees totaling \$15,000
- Core budget contribution of \$75,000
- Supplemental budget contribution of \$135,000
- In-kind housing services worth \$70,000

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

#### Housing:

In the 2014-2015 program year, one intentional community will continue to be housed in a diocesan property (40 Prescott Street in Brookline). Since this is a year-to-year arrangement and since the total number of interns can change, for the purpose of understanding the cost model of the Life Together program, this budget includes the in-kind value of housing provided this year by diocesan property.

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

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

#### MIT Campus Ministry: 3111 - Core & Supplemental

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$117,206) plus program expenses of \$7,000. The ministry may raise additional funds through the MIT development office. A restricted fund provides \$3,108.

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

The Boston University campus ministry cost center budget provides for salary, expenses and benefits for a half-time chaplain (\$50,291) plus program expenses of \$7,000.

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

3131, 3136, 3141 - Core

One chaplain splits her time between the Boston College and Northeastern campuses, and the shared cost center, 3136, provides for the salary, expenses and benefits (\$109,932). Each of these campus ministry programs is allotted \$7,000 for program support.

#### Tufts University Ministry: 3171 - Core

\$8,000 supplements the compensation for the Protestant chaplain, an Episcopalian, at Tufts University.

#### Grace Chapel, Brockton: 3221 – Supplemental

Funding for the ministry in Brockton continues to come from assets held by the former congregation. A congregation, Grace Chapel, which worships and has office space in the First Lutheran Church in Brockton, draws on those funds. Additional funding comes from the proceeds of the sales of the property there to pay the full-time compensation for its priest. Bishop Cederholm and a committee continue to discern what shape the ministry in Brockton is taking.

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

Level funding is provided in the 2015 budget for grants directly to congregations to help pay their clergy, as follows: San Lucas/St. Luke's, Chelsea, \$66,000; and San Juan/Christ Church, Hyde Park, \$44,000; and for the compensation and benefits paid directly to the vicar at St. Stephen's Church, Boston (\$125,088).

#### Cantonese Congregations: 3311, 3321 - Core & Supplemental

The core budget provides the full compensation and benefits support for the canon for Asiamerican ministries in cost center 3311 (\$87,854). The two Cantonese congregations raise additional funds for their ministries through contributions and grants (projected at \$50,000). These revenues and the activities funded through them are reflected in the supplemental budget lines for these two cost centers.

#### St. Mary's, Dorchester: 3331 - Core & Supplemental

\$50,000 to support part of a full-time clergy salary for 2015.

#### Hispanic Ministry in Salem: 3341 - Core

The \$70,000 grant in the 2015 core budget (a \$5,000 decrease from 2014) will help the San Pedro/St. Peter's congregation, both Hispanic and Anglo, to follow its strategic plan that would have it increasingly viable over the next five years.

#### Grace Church, Lawrence: 3351 - Core

The \$65,000 grant in the 2015 core budget (a \$5,000 decrease from 2014) supports part of the salary of a Hispanic priest who ministers to all members of the congregation. Grace has been asked to develop a strategic plan.

#### Church of the Good Shepherd, Watertown: 3361 - Supplemental

At Bishop Shaw's behest, the parishioners at Good Shepherd have developed a long-range plan to develop a center for family ministry as a model for church restarts. A grant of \$60,000 to support part of a clergy salary in the 2015 budget, funded in the supplemental budget through the proceeds from the sale of church buildings.

#### Urban Residents: 3411 - Core & Supplemental

The Urban Residents program places newly ordained clergy in urban parishes for three-year terms, with experienced mentors who help to train the next generation of skilled urban clergy. In 2015 the core budget will fund a full-time Resident. A quarter-time Resident will be funded through the supplemental budget from Annual Fund contributions.

#### African Ministries: 3431 - Core

The budget for grants to African congregations is level funded at \$25,000 in 2015.

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

The core budget shows a renewed commitment of 0.7% of the core budget to the Jubilee Ministry, set at \$45,000; \$32,846 from prior year fundraising was available in 2014 through the core budget.

**Committee on Palestine and Israel: 3531 - Core**

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

**B-SAFE: 3541 - Supplemental**

The B-SAFE program is an important outreach and partnership opportunity for more than 50 participating congregations, including five host churches and the Epiphany School. As a separate 501(c)(3), B-SAFE has its own set of financial controls and development efforts. For 2015 the program is budgeted a diocesan contribution of \$225,000 from the supplemental budget, of which \$125,000 will be funded through the Annual Fund and \$100,000 funded through the grants from the bishop's discretionary funds.

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

Established by Diocesan Convention 2012 in response to the murder of Jorge Fuentes and other acts of violence across the nation, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge Campaign is funded at \$50,000 from the Annual Fund and other contributions. One part-time staff person and volunteers from across the diocese, as well as interfaith and civic partners, are committed to the campaign's projects to help end violence.

**Mission Through Partnerships: 3551 – Core**

\$6,000 to support the travel costs of volunteer missionaries, a decrease from 2014 to reflect the 2013 actuals.

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

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

\$1,768 grant will be given out of a restricted fund.

**Episcopal City Mission: 3931 - Core**

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

**United Thank Offering: 3952 - Core**

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

Strategic Ministries  
2015 Core Budget

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2013 Actuals</b>							
CC3011 Youth Ministry	57,708	87,792	9,272	259	(29,387)	(15,000)	110,644
CC3012 Youth Leadership Academy	19,857	-	19,264	-	(44,808)	-	(5,687)
CC3056 Life Together	-	-	-	-	(4,414)	181,584	177,170
CC3111 MIT	730	169,780	2,802	3,825	-	-	177,137
CC3121 Boston University	170	45,561	5,499	-	-	-	51,230
CC3131 Boston College	3,802	2,042	2,002	-	-	-	7,846
CC3136 BC/NU Combined	2,830	110,366	4,290	-	-	-	117,486
CC3141 Northeastern	-	1,909	-	-	-	-	1,909
CC3171 Tufts University Ministry	8,000	-	-	-	-	-	8,000
CC3231 Chelsea, St Lukes/San Lucas	66,000	-	-	-	-	-	66,000
CC3241 Hyde Park, Christ Church/San Juan	33,000	-	-	-	-	-	33,000
CC3251 South End, St Stephen's	-	132,583	-	-	-	-	132,583
CC3311 Boston Cantonese Congregation	-	86,310	-	-	-	-	86,310
CC3341 Salem, San Pedro	80,000	-	-	-	-	-	80,000
CC3351 Lawrence, Grace Church	72,000	-	-	-	-	-	72,000
CC3411 Urban Residents	75,000	-	-	-	-	-	75,000
CC3431 African Ministries	20,000	-	-	-	-	-	20,000
CC3511 Jubilee Global Mission	-	-	-	-	-	-	-
CC3551 Mission Through Partnerships	239	26	5,747	-	(1,330)	-	4,682
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000
CC3952 UTO/American Indians/CHS	1,184	-	-	-	-	-	1,184
<b>Totals</b>	<b>470,520</b>	<b>636,369</b>	<b>48,876</b>	<b>4,084</b>	<b>(79,939)</b>	<b>166,584</b>	<b>1,246,494</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2015 Budget</b>							
CC3011 Youth Ministry	72,000	103,796	29,000	-	(36,000)	-	168,796
CC3012 Youth Leadership Academy	20,000	-	20,000	-	(40,000)	-	5,000
CC3056 Life Together	-	-	-	-	-	75,000	75,000
CC3111 MIT	-	117,206	7,000	-	-	(3,108)	121,098
CC3121 Boston University	-	50,291	7,000	-	-	-	57,291
CC3131 Boston College	-	-	7,000	-	-	-	7,000
CC3136 BC/NU Combined	-	-	-	-	-	-	8,000
CC3141 Northeastern	-	109,932	-	-	-	-	109,932
CC3171 Tufts University Ministry	-	-	7,000	-	-	-	7,000
CC3231 Chelsea, St Lukes/San Lucas	8,000	-	-	-	-	-	8,000
CC3241 Hyde Park, Christ Church/San Juan	66,000	-	-	-	-	-	66,000
CC3251 South End, St Stephen's	44,000	-	-	-	-	-	44,000
CC3311 Boston Cantonese Congregation	-	125,088	-	-	-	-	125,088
CC3331 Dorchester, St. Mary's	-	87,854	-	-	-	-	87,854
CC3341 Salem, San Pedro	70,000	-	-	-	-	-	70,000
CC3351 Lawrence, Grace Church	65,000	-	-	-	-	-	65,000
CC3411 Urban Residents	75,000	-	-	-	-	-	75,000
CC3431 African Ministries	25,000	-	-	-	-	-	25,000
CC3511 Jubilee Global Mission	45,000	-	-	-	-	-	45,000
CC3531 Committee on Palestine and Israel	-	-	41,000	-	(40,000)	-	1,000
CC3551 Mission Through Partnerships	6,000	-	-	-	-	-	6,000
CC3921 Barbara C Harris Center	1,768	-	-	-	-	-	1,768
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000
CC3952 UTO/American Indians/CHS	1,583	-	-	-	-	-	1,583
<b>Totals</b>	<b>529,351</b>	<b>594,167</b>	<b>118,000</b>	<b>-</b>	<b>(116,000)</b>	<b>71,892</b>	<b>1,197,410</b>



**Strategic Ministries  
2015 Supplemental Budget**

<b>2013 Actuals</b>	<b>Program Expenses</b>	<b>Compensation &amp; Benefits</b>	<b>Operational &amp; Support Svcs</b>	<b>Mgt and Prof Svcs</b>	<b>Transfers</b>	<b>Total Cost</b>	<b>Revenue Offset</b>	<b>Annual Fund</b>	<b>BDF Grants</b>	<b>Use of Proceeds</b>	<b>Net Cost</b>
CG3011 Youth Ministry	-	-	-	-	15,000	15,000	-	(15,000)	-	-	-
CG3056 Life Together	15,178	375,167	147,560	3,100	(181,584)	359,421	(315,889)	(105,500)	-	(7,500)	(69,468)
CG3231 Chelsea St. Lukes / Sm. Lucas	82,021	-	-	21,309	-	103,330	-	-	-	-	103,330
CG3111 Boston Cantonese Congregation	-	-	-	-	-	-	-	-	-	-	-
CG3321 Quincy Cantonese Congregation	70,000	-	-	-	-	70,000	-	-	(70,000)	-	-
CG3361 Watertown, Good Shepherd	70,000	-	-	-	-	70,000	-	(37,500)	-	(37,500)	(5,000)
CG3411 Urban Residents	38,107	12,073	8,639	-	-	58,819	(9,209)	-	-	-	49,610
CG3511 Jubilee Ministry	225,000	-	-	-	-	225,000	-	(100,000)	(125,000)	-	-
CG3541 B-SAFE	-	-	915	10	-	925	(1,247)	-	-	-	(322)
CG3545 B-PEACE	60,000	-	252	-	-	60,252	-	-	(60,000)	-	252
CG3911 Cathedral Church of St Paul	560,306	387,240	157,366	24,419	(166,584)	962,747	(326,345)	(258,000)	(185,000)	(115,000)	78,402
<b>Totals</b>											

<b>2015 Budget</b>	<b>Program Expenses</b>	<b>Compensation &amp; Benefits</b>	<b>Operational &amp; Support Svcs</b>	<b>Mgt and Prof Svcs</b>	<b>Transfers</b>	<b>Total Cost</b>	<b>Revenue Offset</b>	<b>Annual Fund</b>	<b>BDF Grants</b>	<b>Use of Proceeds</b>	<b>Net Cost</b>
CG3056 Life Together	42,900	458,911	181,340	12,000	(75,000)	620,151	(261,000)	-	-	-	359,151
CG3111 MIT	-	-	-	-	3,108	3,108	-	-	-	-	3,108
CG3221 Brockton, Grace Chapel	-	93,086	-	-	-	93,086	-	-	-	-	93,086
CG3311 Boston Cantonese Congregation	10,000	-	40,000	-	-	50,000	-	-	-	-	88,000
CG3331 Dorchester St. Mary's	50,000	-	-	-	-	50,000	-	-	-	-	50,000
CG3361 Watertown, Good Shepherd	60,000	-	-	-	-	60,000	-	-	-	-	60,000
CG3411 Urban Residents	18,750	-	-	-	-	18,750	-	-	-	-	18,750
CG3511 Jubilee Global Mission	225,000	-	-	-	-	225,000	-	-	-	-	32,846
CG3541 B-SAFE	35,000	15,000	-	-	-	50,000	-	-	-	-	225,000
CG3545 B Peace	65,000	-	-	-	-	65,000	-	-	-	-	60,000
CG3911 Cathedral Church of St Paul	506,650	566,997	221,340	32,000	(71,892)	1,235,095	(261,000)	-	-	-	974,095
<b>Totals</b>											

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

The total 2015 budget for this area is \$2,371,555, with \$2,183,716 in the core budget and \$187,839 in the supplemental budget. The 2014 core budget total was \$2,104,461.

Area Staff and Expenses: 4000 - Core

This line includes two positions, one of which is being restructured. (See roster on page 53.) Note that the part-time archivist position is currently vacant and ably administered by a volunteer. The half-time project director of global mission is being funded from the Together Now campaign mission tithe to oversee and support congregations and their partners outside the diocese as they develop and maintain collaborative mission work, either on their own or with Mission Tithe Grant money.

Diocesan Leadership Team: 4011, 4012, 4014 - Core

These three cost center codes carry the compensation for the diocesan bishop, the bishop suffragan and the canon to the ordinary, and their expense budgets. The bishop suffragan and canon to the ordinary expense lines have been increased to reflect 2013 actuals.

Assisting Bishops: 4021 - Core

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

New Bishop Transition Reserve: 4023 – Core

It is important to create a long-term fund to help pay for the costs associated with the discernment, election and transition components of this process. Diocesan Council's goal is to contribute \$50,000 per year out of the core budget to build this reserve. For 2015, \$10,000 has been set aside while Council explores other ways to fund this reserve.

Chancellor: 4031 - Core

This line is budgeted at \$1,500, with every effort made to assign legal costs to the specific cost center(s).

Title IV: 4061 - Core

Canonical clergy disciplinary process, budgeted at \$12,000 for 2015.

Diocesan Leadership Budgeted Reserve: 4099 - Core

The entire budgeted amount of \$187,624 for 2015 represents funding for potential contingencies, potential staff compensation increases and funding for vacant staff positions.

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

The 2015 amounts budgeted for these leadership bodies are \$7,500 for Diocesan Council; \$2,000 for Standing Committee; and \$4,500 for the Diocesan Youth Council.

Diocesan Convention: 4141 - Core

The \$50,000 net costs budgeted for 2015 assume a two-day convention.

Journals and Diocesan Directory: 4151 - Core

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

Archives: 4211 - Core

This line is funded primarily by spending policy draws from four restricted funds, which total \$13,600. In 2015, it may become necessary to hire a part-time archivist to work alongside our longtime volunteer. Potential compensation is in cost center 4099.

Massachusetts Council of Churches: 4251 - Core

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

Development Office: 4311- Core and Supplemental

Since 2009, the staff of the Office of Development has been funded in the supplemental budget, through a grant from the Bishop's Discretionary Fund. A portion of the cost of the development staff's compensation and benefits are allocated to the Together Now campaign based on actual experience. Staff compensation and benefits total approximately \$136,839. In addition, we have allocated approximately \$58,000 of compensation costs to the Together Now campaign. The work of the Office of Development, through the Annual Fund appeals, directed development efforts on behalf of specific ministries, external grant applications, planned giving and the Together Now campaign are essential to the long-term viability of the diocesan mission strategy. In 2015 it may become necessary to hire an annual fund director.

Annual Fund: 4312 - Supplemental

Projected expenses for 2015 are \$26,000 based on 2013 actuals.

General Convention: 4411 - Core

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

Province I Assessment: 4421 - Core

Our diocese's contribution is \$16,179. We are no longer asked for an additional \$3,000 to support the province's energy stewardship minister.

Episcopal Church Asking: 4431 - Core

Our diocese's contribution to the work of the wider church is \$966,308, \$45,000 higher than the 2014 asking.

**Episcopal and Diocesan Support  
2015 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2013 Actual</b>							
CC4000 Episcopal and Diocesan Support	-	117,718	-	-	-	-	117,718
CC4011 Diocesan Bishop	12,564	225,011	52,846	10	(10)	-	290,421
CC4012 Suffragan Bishop 1	-	176,010	31,560	4	-	-	207,574
CC4014 Canon to the Ordinary	-	180,294	14,756	-	-	-	195,050
CC4021 Assisting Bishops	500	38,509	9,829	(40)	-	-	48,798
CC4022 Retired Bishops	-	-	154	-	-	-	154
CC4031 Chancellor	-	-	-	1,249	-	-	1,249
CC4061 Title IV	-	-	1,016	16,713	-	-	17,729
CC4099 Diocesan Leadership Budgeted Reserve	500	-	-	175	-	-	675
CC4111 Diocesan Council	17	-	6,055	600	-	-	6,672
CC4121 Standing Committee	-	-	3,126	-	-	-	3,126
CC4131 Diocesan Youth Council	4,384	-	147	-	-	-	4,531
CC4141 Convention	35	459	33,124	201	(9,630)	-	24,189
CC4151 Journals and Diocesan Directory	-	-	10,051	-	-	-	10,051
CC4211 Archives	-	5,366	1,133	140	(12)	-	6,627
CC4251 Mass Council of Churches	50,000	-	-	-	(540)	-	49,460
CC4411 General Convention	-	-	16,000	-	-	-	16,000
CC4421 Province I Assessment and Program	19,454	-	1,485	-	-	-	20,939
CC4431 The Episcopal Church Assessment	949,645	-	-	-	-	-	949,645
<b>Totals</b>	<b>1,037,099</b>	<b>743,367</b>	<b>181,282</b>	<b>19,052</b>	<b>(10,192)</b>	<b>-</b>	<b>1,970,608</b>

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Transfers</u>	<u>Total</u>
<b>2015 Budget</b>							
CC4000 EPISCOPAL AND DIOCESAN SUPPORT	-	146,413	-	-	-	-	146,413
CC4011 Diocesan Bishop	8,000	227,536	50,000	-	-	-	285,536
CC4012 Suffragan Bishop 1	-	172,112	28,000	-	-	-	200,112
CC4014 Canon to the Ordinary	-	165,944	12,000	-	-	-	177,944
CC4021 Assisting Bishops	-	20,000	4,000	-	-	-	24,000
CC4023 Bishop Elections	-	-	10,000	-	-	-	10,000
CC4031 Chancellor	-	-	-	1,500	-	-	1,500
CC4061 Title IV	-	-	2,000	10,000	-	-	12,000
CC4099 Diocesan Leadership Budgeted Reserve	-	132,624	25,000	30,000	-	-	187,624
CC4111 Diocesan Council	-	-	7,500	-	-	-	7,500
CC4121 Standing Committee	-	-	2,000	-	-	-	2,000
CC4131 Diocesan Youth Council	4,500	-	-	-	-	-	4,500
CC4141 Convention	1,200	1,000	58,600	200	(11,000)	-	50,000
CC4151 Journals and Diocesan Directory	-	10,500	11,000	200	(600)	-	11,000
CC4211 Archives	-	-	3,500	200	-	-	13,600
CC4251 Mass Council of Churches	50,000	-	-	-	-	-	50,000
CC4261 Ecumenical Committee	-	-	1,500	-	-	-	1,500
CC4311 Development	-	-	-	-	-	-	-
CC4411 National General Convention	-	-	16,000	-	-	-	16,000
CC4421 Province I Assessment and Program	16,179	-	-	-	-	-	16,179
CC4431 The Episcopal Church Assessment	966,308	-	-	-	-	-	966,308
<b>Totals</b>	<b>1,046,187</b>	<b>876,129</b>	<b>231,100</b>	<b>41,900</b>	<b>(11,600)</b>	<b>-</b>	<b>2,183,716</b>

**Episcopal and Diocesan Support  
2015 Supplemental Budget**

<u>2013 Actual</u>	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>	<u>BDF Grants</u>	<u>Net Cost</u>
	CC4011 Diocesan Bishop	-	-	-	-	-	-	-
	CC4012 Suffragan Bishop	-	63,383	-	(44,364)	19,019	-	19,019
	CC4099 Diocesan Leadership Budgeted Reserve	-	-	-	-	-	-	-
	CC4311 Development	446	222,371	3,802	-	245,134	(250,000)	(4,866)
	CC4312 Annual Fund	-	405	59	-	38,055	-	38,055
	CC4313 Planned Giving	-	113	-	-	113	-	113
	<b>Totals</b>	<b>446</b>	<b>222,889</b>	<b>119,489</b>	<b>(44,364)</b>	<b>302,321</b>	<b>(250,000)</b>	<b>52,321</b>
	<b>2015 Budget</b>							
	CC4011 Diocesan Bishop	-	-	-	-	-	-	9,000
	CC4012 Suffragan Bishop	-	-	-	-	-	-	17,000
	CC4311 Development	-	136,839	24,000	1,000	161,839	-	161,839
	CC4312 Annual Fund	-	-	26,000	-	26,000	-	26,000
	<b>Totals</b>	<b>-</b>	<b>136,839</b>	<b>50,000</b>	<b>1,000</b>	<b>187,839</b>	<b>-</b>	<b>187,839</b>
								<b>194,941</b>

Administrative Services (see table on page 39)

The total 2015 budget for this area is \$1,359,784, all from the core budget. The 2014 core budget total was \$1,247,501.

Administrative Services: 5000 - Core

This area has six staff positions within it (see roster on page 53) and a \$10,000 reserve.

Treasurer's Office: 5011 - Core

This cost center has been consolidated since 2014. It includes support expenses of \$42,500 (office supplies, licenses, dues) along with outside service fees, including the auditors, totaling \$85,300. The cost center overall shows a net inflow, as the Treasurer's Office receives \$97,000 in fee income for financial and administrative services provided. The largest sources of fee income are the Cathedral Church of St. Paul (\$63,000) and the Trustees of Donations (\$34,000). In addition, the administrative services area receives \$25,000 per year from the Stokes Fund program to cover administrative costs associated with the loan program (see cost center 5511).

Human Resources: 5021 - Core

Since August of 2012, we have utilized the expertise of outside HR consultants to help us understand our future needs and to work with us to shore up various internal personnel policies. In 2015, our plan is to hire an HR director and use consultants to supplement this vital function as needed. We have appropriated \$2,200 to HR for support and \$20,000 for the consultants. The HR director compensation is included in cost center 5000.

Information Technology: 5031 - Core

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

Risk Management: 5041 - Core

This amount is raised to \$70,600, based on projections related to the cost of insurance.

Investments: 5051 - Core

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) for making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2015 is \$5,600.

Boston, 138 Tremont Street: 5111 - Core

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

Brookline, 40 Prescott Street: 5121 - Core

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

Allston property: 5125 - Core

The property reverted back to the diocese in 2009 after the Church of St. Luke and St. Margaret closed. The diocese has been paying for its upkeep ever since from the core budget. In 2012, Bishop Shaw convened a committee to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The core budget allocation for this property to \$35,000 in 2015, up from \$20,000 in 2014, reflects 2013 actuals.

Diocesan Properties: 5141 - Core

This cost center includes \$18,000 for a consultant on the status and sales of diocesan properties and \$10,000 for a reserve for building improvements.

Services to Stokes Loan: 5511 - Core

This amount, which covers the cost to administer the diocese's revolving loan fund, is now found in cost center 5011.

**Administrative Services  
2015 Core Budget**

	<u>Program Expenses</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<b>2013 Actual</b>						
CC5000 Administrative Services	-	489,111	-	-	(5,000)	484,111
CC5011 Treasurer's Office	-	-	44,676	87,297	(97,000)	34,973
CC5021 Human Resources	-	-	446	81,435	-	81,881
CC5031 Information Technology	-	-	75,037	-	(40,200)	34,837
CC5041 Risk Management	-	-	-	70,425	-	70,425
CC5051 Investments	-	-	-	5,570	-	5,570
CC5111 Boston, 138 Tremont Street	-	-	509,645	-	-	509,645
CC5121 Brookline, 40 Prescott Street	-	20,978	7,806	-	-	28,784
CC5125 Allston property	20,831	42,686	63,546	36,085	(67,000)	96,148
CC5511 Services to Diocesan Loan Program	-	-	-	-	(30,000)	(30,000)
<b>Totals</b>	<b>20,831</b>	<b>552,775</b>	<b>701,156</b>	<b>280,812</b>	<b>(239,200)</b>	<b>1,316,374</b>
<b>2015 Budget</b>						
CC5000 ADMINISTRATIVE SERVICES	-	637,059	10,000	-	-	647,059
CC5011 Treasurer's Office	-	3,600	42,500	85,300	(122,000)	9,400
CC5021 Human Resources	-	-	2,225	8,000	-	10,225
CC5031 Information Technology	-	-	75,000	-	(40,200)	34,800
CC5041 Risk Management	-	12,000	-	70,600	(12,000)	70,600
CC5051 Investments	-	-	-	5,600	-	5,600
CC5111 Boston, 138 Tremont Street	-	-	499,100	-	-	499,100
CC5121 Brookline, 40 Prescott Street	-	-	20,000	-	-	20,000
CC5125 Allston property	-	-	35,000	-	-	35,000
CC5141 Diocesan properties	-	18,000	10,000	-	-	28,000
CC5511 Services to Stokes Loan	-	-	-	-	-	-
<b>Totals</b>	<b>-</b>	<b>670,659</b>	<b>693,825</b>	<b>169,500</b>	<b>(174,200)</b>	<b>1,359,784</b>
						<b>99</b>
						<b>584,763</b>
						<b>(1,732)</b>
						<b>22,225</b>
						<b>44,586</b>
						<b>66,159</b>
						<b>5,600</b>
						<b>510,900</b>
						<b>20,000</b>
						<b>20,000</b>
						<b>(25,000)</b>
						<b>1,247,501</b>

### Proceeds from Closed Congregations: Additional Information

The following congregations have closed in recent years:

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

In the transition surrounding a church closing, diocesan staff provide support and services of all kinds. At the end of the closing process, the remaining assets are transferred to the diocese, for the Diocesan Council to allocate. In February 2011, the council created a new Fund for Congregational Vitality from 50% of the net proceeds for the above congregations (except Brockton). The remaining 50% has been available for distribution by the council. In early 2013, Diocesan Council approved the appropriation of up to \$1.2 million from the remaining 50% of the uncommitted net proceeds to go toward a renovation project at St. Luke's/San Lucas in Chelsea for its feeding and clothing programs. As of Aug. 31, 2014, \$705,260 has been disbursed. In 2014, Diocesan Council implemented a streamlined application process to discern how best to distribute proceeds for the ministry of our diocese. The new process offers increased transparency by posting the proposals and Diocesan Council's decisions on the diocesan Web site.

The table on page 41 shows status of the proceeds for 12 of the closed congregations:

- Proceeds**—Gross revenue from sales, or in the case of Natick, a transfer of endowment
- Direct Costs**—Brokerage fees, if any; legal and zoning; preparing the property for market; past-due assessments and loans; staff and archive costs
- Net Proceeds**—Direct costs subtracted from proceeds
- Net Margin on Proceeds**—The percentage of the proceeds available after costs
- 50% of Net Proceeds**—50% of the net proceeds is sent to the Fund for Congregational Vitality; the other 50% is available for the stewardship process
- Designated or expended to date**—In advance of the stewardship process, Diocesan Council allocated some of the proceeds as follows:
  - Malden: \$261,154 to help fund a clergy salary at St. John's Church, Saugus, where a majority of the Malden congregation now worships
  - Belmont: \$289,894 to help fund a clergy salary, interns and program at the Church of the Good Shepherd, Watertown, an experiment in building family ministry, and to fund half an urban resident grant at St. James's Church, Cambridge
  - South Boston: \$527,832 to St. Mary's Church, Dorchester, at the request of the closing church and the deanery, for building repair, and to pay for half of the cost of an urban resident
- Available**—The remaining balance of the 50% currently available for distribution by Council.

The net proceeds from St. Paul's Church, Brockton are currently outside the stewardship process. The St. David's, Pepperell property is currently on the market.





### Together Now Campaign: Additional Information

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

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

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

#### Campaign highlights:

- 100% of the congregations of the diocese elected to participate.
- Nearly 4,000 individual gifts and pledges have been offered.
- Just more than \$20 million was raised for diocesan campaign initiatives.
- An additional \$11.8 million has been raised by 39 local collaborative campaigns, bringing the total raised across the diocese to just under \$32 million.

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

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

The July 31, 2014, cash flow chart on page 44 reflects the collections of pledges and contributions from individuals and congregations, designated gifts as well as unrestricted gifts. An amount of \$4,972,165 has been returned to collaborative campaign parishes. Expenses fall into two categories: "Direct Campaign Expenses" which reflect money spent on the implementation of the campaign initiatives and "Other Expenses" which are costs associated with fundraising: consultations, fees and expenses. Under "Direct Campaign Expenses," the funds designated to the Barbara C. Harris Camp and Conference Center are included in the Youth and Young Adult column. Likewise, the Cederholm Cottage falls under the Camp and Conference Center column. Now that construction is underway, the Cathedral Church of St. Paul has received its campaign payments in full. Under "Other Expenses," the total amount spent on direct fundraising costs is slightly above 10% of the total raised for the diocesan portion, but when compared to the total raised across the diocese (approximately \$32 million), the percentage is a very favorable 7.3%.

It is worth noting that at roughly the halfway point of this five-year pledge payment period, we have received just over half of the total amount pledged. We hope that, as people continue to see these funds expended for God's mission across the diocese and beyond, they will continue to faithfully fulfill their pledge commitments.

**Together Now Campaign**  
**Cash Basis Revenues and Expenses**  
**July 31, 2014**

	<u>General Restriction</u>	<u>Mission Tithe</u>	<u>Environmental Initiatives</u>	<u>Mission Hubs</u>	<u>Mission Institute</u>	<u>Y&amp;Y Adults</u>	<u>Cathedral Renovations</u>	<u>Total</u>
<b>Revenues</b>								
Leadership Gifts	6,902,532	-	-	346,966	186,500	392,653	567,333	8,395,984
Collaborative Gifts from parishes (100% gross)	7,439,505	104	-	(50)	-	17,500	-	7,457,059
In pew collections	871,735	-	-	-	-	-	-	871,735
Interest Income	1,684	-	-	-	-	-	-	1,684
<b>Gross Revenue</b>	<b>15,215,456</b>	<b>104</b>	<b>-</b>	<b>346,916</b>	<b>186,500</b>	<b>410,153</b>	<b>567,333</b>	<b>16,726,462</b>
Less payments to collaborating parishes to date (70%)	(4,972,165)	-	-	-	-	-	-	(4,972,165)
<b>Net Revenues</b>	<b>10,243,291</b>	<b>104</b>	<b>-</b>	<b>346,916</b>	<b>186,500</b>	<b>410,153</b>	<b>567,333</b>	<b>11,754,297</b>
<b>Direct Expenses</b>								
Compensation and benefits (Program Staff)	572,642	49,259	-	405,970	108	-	44	1,028,023
Direct Campaign Expenses, non compensation	200	658,975	510,807	269,494	267,268	1,045,000	3,850,000	6,601,744
Direct Program Expenses	1,304	321	1,878	5,362	-	-	-	8,865
<b>Total Direct Expenses</b>	<b>574,146</b>	<b>708,555</b>	<b>512,685</b>	<b>680,826</b>	<b>267,376</b>	<b>1,045,000</b>	<b>3,850,044</b>	<b>7,638,632</b>
<b>Other Expenses</b>								
Compensation and benefits (Indirect Staff)	167,949	-	-	-	-	-	-	167,949
Operating and staff support	328,600	8,585	3,221	64,279	118	36	-	404,839
Technology costs	3,479	-	-	3,613	-	-	-	7,092
Facilities and other services	22,620	-	-	7,096	-	-	-	29,716
Management and professional services	1,808,409	-	-	37,181	-	-	-	1,845,590
<b>Total Other Expenses</b>	<b>2,331,057</b>	<b>8,585</b>	<b>3,221</b>	<b>112,169</b>	<b>118</b>	<b>36</b>	<b>-</b>	<b>2,455,186</b>
<b>Total Expense</b>	<b>2,905,203</b>	<b>717,140</b>	<b>515,906</b>	<b>792,995</b>	<b>267,494</b>	<b>1,045,036</b>	<b>3,850,044</b>	<b>10,093,818</b>
<b>Net Cash Inflow from inception</b>	<b>7,338,088</b>	<b>(717,036)</b>	<b>(515,906)</b>	<b>(446,079)</b>	<b>(80,994)</b>	<b>(634,883)</b>	<b>(3,282,711)</b>	<b>1,660,479</b>

Episcopal Election and Transition (see table on page 46)

All the expenses for the episcopal discernment, search, election and transition are included in the Episcopal and Diocesan Support area, but not reported in the supplemental or core budgets.

In February of 2013, the Standing Committee requested that the Diocesan Council help develop and then oversee budgets for each of its election committees: discernment and transition. The council in turn charged its Budget Committee with executing that task. In October 2013, the Diocesan Council approved a budget of \$290,500, an additional \$18,000 for the celebration for retiring Bishop Shaw and up to \$150,000 for nine months of salary for a bishop coadjutor. These budgets were revised and fine tuned over the subsequent months to reflect actual bids and the fact that the bishop-elect would succeed as diocesan bishop, not bishop coadjutor. The chair of the Budget Committee was in regular contact with the discernment and transition committees and gave regular reports to the Budget Committee and Council.

In December 2013, after pursuing other funding options, the council voted to authorize the treasurer to withdraw not more than \$375,000 from unrestricted endowment to fund the search and transition budget.

The Discernment Committee came in \$24,995 below its budget of \$103,500. On the other hand, as of Aug. 31, 2014, the Transition Committee, despite savings in many areas, was forecast to exceed its budget of \$187,000 by \$120,745. Most of the overrun is related to the expense of the consecration. The celebration of Bishop Shaw committee underspent its revised budget of \$40,000 by \$3,185.

**Episcopate Transition - Actual vs. Budget  
August 31, 2014**

<u>Cost Center Description</u>	<u>Compensation &amp; Benefits</u>	<u>Operational &amp; Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Actual Total</u>	<u>Forecast</u>	<u>Actual plus Forecast</u>	<u>Budget</u>	<u>Variance</u>
CC4701 Administrative Assistant; Web Consultant	660	744	2,605	4,009	-	4,009	20,000	15,991
CC4702 Election Consultant	2,575	9,760	13,057	25,392	-	25,392	25,000	(392)
CC4703 Meeting Expense - Food	-	3,488	-	3,488	-	3,488	5,000	1,512
CC4704 Meeting expense - Travel Reimb	-	7,475	-	7,475	-	7,475	5,000	(2,475)
CC4705 Meeting Expense - Room Rental	-	-	350	350	-	350	1,500	1,150
CC4706 Interview Expense - Web Conferencing	-	320	-	320	-	320	5,000	4,680
CC4707 Chaplains	-	-	725	725	-	725	-	(725)
CC4721 Expense for Retreat (SC, DC, TC)	-	6,328	-	6,328	-	6,328	2,000	(4,328)
CC4731 Retreat Facility (Wylie Inn)	-	20,718	-	20,718	-	20,718	21,300	582
CC4732 Candidate Travel	-	6,100	-	6,100	-	6,100	4,000	(2,100)
CC4741 Transportation, Lodging & Meals	-	-	-	-	-	-	13,500	13,500
CC4751 Documentary Checks	-	-	3,600	3,600	-	3,600	1,200	(2,400)
Subtotal Discernment Committee	3,235	54,933	20,337	78,505	-	78,505	103,500	24,995
CC4801 Administrative Assistant; Web Consultant	-	216	1,635	1,851	-	1,851	20,000	18,149
CC4802 Printing, Copying, Mailings, Postage	-	5,446	15	5,461	2,039	7,500	7,500	0
CC4803 Chaplains	-	-	460	460	2,540	3,000	3,000	0
CC4821 Media - Web Broadcast Communications	-	284	1,325	1,609	-	1,609	9,000	7,391
CC4822 Website Maintenance & Support	-	-	-	-	-	-	3,500	3,500
CC4831 Walk-About	-	25,787	-	25,787	-	25,787	15,000	(10,787)
CC4841 Support for Staff	3,675	867	3,106	7,648	7,852	15,500	15,500	0
CC4851 Election Committee	-	13,774	-	13,774	-	13,774	13,500	(274)
CC4861 Housing Assistance/ Moving Expense	-	10,715	-	10,715	6,784	17,499	17,500	1
CC4862 Bishop - Elect Travel and Lodging	-	511	-	511	2,989	3,500	3,500	0
CC4863 Spouse and Children Needs	-	-	-	-	2,500	2,500	2,500	0
CC4871 Consecration Invitations & Special Bulletins	-	-	-	-	10,250	10,250	5,500	(4,750)
CC4872 Consecration Hospitality Reception	-	700	-	700	45,700	46,400	27,500	(18,900)
CC4873 Consecration Lease	-	70,723	-	70,723	70,177	140,900	25,000	(115,900)
CC4874 Travel & Lodging for Visiting Dignitaries	-	-	-	-	8,500	8,500	8,500	0
CC4875 Episcopal Gift	-	1,675	-	1,675	2,500	4,175	5,000	825
CC4890 Contingency	-	250	-	250	5,000	5,250	5,000	-
Subtotal Transition Committee	3,675	130,948	6,541	141,164	166,831	307,995	187,000	(120,745)
Total Discernment & Transition	6,910	185,881	26,878	219,669	166,831	386,500	290,500	(95,750)
CC4023 Celebration of Bishop Shaw	3,900	15,467	1,774	36,515	300	36,815	40,000	3,185

**Appendix 1: 2015 Endowment Spending Policy Revenue  
and related market values as of June 30, 2014**

		<b>Market Value of Fund - 6/30/14</b>	<b>Draw Amount</b>
7002B	HOLY NATIVITY SEEKONK	116,845	1,972
7002C	JOHN C COBURN ENDOWMENT FUND	1,421,879	49,724
7002D	C.L.T. LEE/ B. WONG FUND	130,196	4,627
7002E	AFRICAN SCHOLARSHIP FUND	295,779	10,341
7002G	ENDOWMENT FOR MAINTENANCE	228,511	7,982
7002J	AIM/HOSPITAL MINISTRY	649,532	22,717
7002L	HARRIET G AVERILL FUND	45,277	1,583
7002M	D A F BISHOP NASH FUND	234,575	8,203
7002N	CLERGY SALARY FUND	861,427	30,124
7002O	A E EMERY CAMP DENNEN FUND	50,649	1,768
7002P	FREDRICK C LAWRENCE/RHINELANDER FUND	287,491	10,054
7002R	CAROLINE C HASKETT FUND	2,292	80
7002S	ADELAIDE R HARRIS FUND	5,742	201
7002T	THE ELIZA GRAY CASE TRS P E C	3,501,869	123,207
7002U	CAMPUS MINISTRIES FUND	270,995	9,477
7002V	ST JOHNS EAST BOSTON FUND	738,083	25,811
7002W	AMELIA GRANT SCHWARZ	565,032	19,312
7002X	GENERAL ENDOWMENT FUND	2,507,636	40,000
7002Y	HOUSE OF MERCY FUND	821,256	28,720
7002Z	ENDOWMENT FUND - ROSLINDALE	103,118	3,688
7003A	THE JESSIE B COX FUND	892,682	31,218
7003B	WILLIAM V. TRIPP JR. MEMORIAL FUND	1,143,357	39,984
7003C	AIM CHRISTIAN WITNESS IN EDUCATION	1,079,604	37,754
7003D	MAURINE C COBURN TRUST	193,009	6,750
7003E	YOUTH ON MISSION	204,618	7,156
7003F	AIM WILLIAM COOLIDGE ENDOWMENT	4,259,759	148,966
7003R	W CHISOLM FUND	105,750	3,696
7003T	JENNIE F GETCHELL FUND	153,200	2,706
7004E	SEMINARIAN EDUCATIONAL ENDOWMENT	1,434,248	50,292
7004H	DEAF MINISTRY ENDOWMENT	656,788	8,000
7004I	FUND FOR CONGREGATIONAL VITALITY	3,772,428	132,035
8000T	FREDERICK A REEVE FUND	249,311	8,773
8000V	THOMAS M COFFIN FUND	147,813	5,223
8000W	A. JACKSON FUND	83,268	2,960
8000X	BISHOPS ENTERTAINMENT FUND	178,539	6,283
	<b>TOTAL</b>	<b>27,392,556</b>	<b>891,387</b>

**Appendix 2: 2015 Trust Fund Income  
and related market values as of June 30, 2014**

		<b>Market Value of Fund - 6/30/14</b>	<b>Draw Amount</b>
2110B	G & S TURNER MEMORIAL FUND	15,920	550
4065A	ST MATTHEWS ENDOWMENT FD	174,156	6,018
4065B	SAMUEL & EMMA DOWNING FD	9,178	317
4065C	JOSEPH C STOREY FUND	101,069	3,495
4065D	MARY A WILSON FUND	53,229	1,840
4065E	A SMITH FUND FOR RECTORY MAINTENANCE	77,093	2,665
7000A	DIOCESAN ENDOWMENT FUND	5,329,835	184,671
7000B	VOTE OF CORP DIOCESAN FUND	2,117,624	73,316
7000D	FAY DONATION I	276,509	9,574
7000G	BENJAMIN LEEDS FUND	5,730,501	174,981
7000I	CHURCHES AND CHAPELS FUND	102,520	3,550
7001E	APPLETON FUND	57,385	1,987
7001F	BISHOP'S FUND	1,346,351	46,617
7001G	BISHOP OF MA SALARY FUND	169,519	5,870
7001H	BISHOP'S HOUSE FUND	278,263	9,635
7001I	SUFFRAGAN BISHOPS FUND	1,089,593	37,727
7001J	CAMILLA DAVENPORT FUND	42,679	1,478
7001K	CORNELIA A FRENCH FUND	954,103	33,036
7001L	KATHERINE FRENCH FUND	198,301	6,866
7001O	ETHEL A CLARK FUND	1,306,954	45,253
7001Q	MARY K D BABCOCK FUND I	303,599	10,512
7001R	MARY K D BABCOCK FUND II	37,891	1,312
7001S	JULIA K DAVEY FUND	94,353	3,267
7001T	WILLIAM C WINSLOW FUND	13,825	479
7001W	WORKS OF MERCY HARVISON FUND	51,054	1,768
7001X	AMY YEAMES FUND	61,255	2,121
7001Y	EDITH MUNRO FUND	26,753	926
7002Q	A C BULLARD FUND	257,432	8,914
7003X	PATTON MEMORIAL FUND	1,390,796	48,126
7004B	PATTON FUND FOR MAINTENANCE	114,699	3,969
7004C	KATHERINE M FOSTER TRUST	242,065	8,376
7004D	FRANK H BURNETT FUND	50,112	1,734
9000Z	ABBY BROWN TRUST	201,020	6,960
9001B	EDMUND F SLAFTER FUND II	251,761	8,717
	<b>TOTAL</b>	<b>22,527,395</b>	<b>756,627</b>



## Appendix 3: Grants to Congregations in 2013

Congregational Development Open Grants			\$200,000
Congregation	City	Program	Grant Amount
Church of the Good Shepherd	Acton	Worship-To-Go Program	\$3,600
St. James's Church	Amesbury	Meditation Garden	\$7,000
All Saints Church	Attleboro	Building Up the Saints of God: A Music Initiative	\$4,500
St. Paul's Church	Bedford	"A Retreat Is Not An Advance"	\$5,000
Boston Episcopal Chinese Ministry	Boston	Youth Zone	\$3,000
St. Stephen's Church	Boston	Building Leadership	\$7,500
Grace Chapel	Brockton	Boys' and Girls' Brigade	\$5,000
St. Paul's Church	Brookline	Developing the Next Generation of Parish Leadership	\$4,700
St. Peter's Church	Buzzards Bay	Welcoming Our Neighbors from Nearby and Far Away	\$5,000
St. James's Church	Cambridge	Anti-Oppression Initiative Training Year III	\$4,580
St. John's Church	Charlestown	Widening Our Worship	\$3,420
Cape and Islands Deanery	Chatham	Empowering Parishes in A Digital World	\$3,316
St. Luke's Church	Chelsea	Music Ministry	\$5,000
common cathedral		Common Art	\$3,700
All Saints Church of the North Shore	Danvers	Newcomers Welcome Initiative	\$4,150
St. Mary's Church	Dorchester	Enhancing Our Sunday Worship	\$2,000
Church of the Holy Spirit	Fall River	Growth and Evangelism	\$2,000
St. Mark's Church	Foxborough	Intergenerational Spiritual Development	\$4,300
Concord River Deanery	Framingham	At The Water's Edge Adult Formation	\$4,100
St. Andrew's Church	Framingham	Health Care Ministry	\$3,650
St. John's Church/Trinity Church	Franklin/Wrentham	Growing, Sustaining and Enhancing Collaborative Ministry	\$6,000
St. James's Church	Groveland	Sharing God's Love Through Stories	\$6,500
St. Andrew's Church	Hanover	Establishing A Meditation Garden	\$3,000
Trinity Church	Haverhill	Meditation Garden	\$4,980
St. John's Church	Holbrook	Adult Formation and Publicity	\$2,700
Grace Church	Lawrence	Strengthening Youth and Children's Ministry	\$3,500
St. Stephen's Church	Lynn	Strengthening Family Ministries	\$7,500
Trinity Church	Marshfield	Growing Congregations: the Watertown Approach	\$4,500
Grace Church	Medford	Supporting Alternative Worship	\$4,100
Christ Church	Needham	Website Redesign	\$2,000
St. Andrew's Church	New Bedford	Bridging the Gap	\$4,000
Parish of St. Paul, St. John's Church, Trinity Church	Newton Highlands	Stephen Ministries Collaborative	\$9,066
Christ Church	Plymouth	Developing Sustainable Ministries Year III	\$6,100
St. Chrysostom's Church	Quincy	Stephen Ministry Pastoral Care	\$4,369
Trinity Church	Randolph	Knowing Our Community Better	\$2,700
Trinity Church	Rockland	Students Gather Around the Table	\$600
All Saints' Church	Stoneham	Children's Christian Education Formation	\$3,500
St. Elizabeth's Church	Sudbury	Stephen Ministry Pastoral Care	\$4,369
St. Thomas' Church	Taunton	Developing A Senior Ministry	\$2,250
Epiphany Church	Walpole	Exploration in the Episcopal Faith	\$1,000
Christ Church	Waltham	Strengthening Children's Ministries	\$5,000
Church of the Good Shepherd	Wareham	Becoming More Visible in Our Community	\$4,250
Church of the Holy Spirit	Wayland	Spiritual Connection Through Outdoor Worship Year III	\$3,400
Emmanuel Church	West Roxbury	Inviting People to Our Congregation	\$3,600
St. John's Church	Winthrop	Building On Our Hospitality	\$6,000
			<b>\$190,500</b>

Congregational Development Targeted Grants			\$70,000
Congregation	City	Program	Grant Amount
All Saints Church	Attleboro	Stewardship Pledging Development	\$4,000
Life Together	Brookline	VISIONS Anti-Oppression Training	\$7,500
Grace Church	Everett	Haitian Concert Development	\$7,000
Grace Church	Everett	Memories Program	\$5,000
Iglesia de San Juan	Hyde Park	Summer Music Program	\$5,000
Grace Church	Lawrence	Music Program and Children's Ministry	\$4,250
St. James' Church	Somerville	Church Development and Community Relations	\$10,000
Trinity Church	Stoughton	Ministry Expansion	\$6,000
Epiphany Church	Walpole	A Special Grace	\$7,250
All Saints Church	Whitman	Stewardship Pledging Development	\$8,000
			<b>\$64,000</b>

House of Mercy Deanery Grants			\$27,607
Congregation	City	Program	Grant Amount
<b>Alewife Deanery</b>			
St. Paul's Church	Bedford	Charlie Cards	\$800
St. James' Church	Cambridge	Helping Hand Food Pantry	\$900
St. Peter's Church	Cambridge	Afterworks	\$500
Christ Church	Waltham	Diaper Depot	\$100
<b>Boston Harbor Deanery</b>			
The Church of The Advent	Boston	Tuesday Community Supper Program	\$1,150
St. Stephen's Church	Boston	St. Stephen's Place of Opportunity for Teens	\$1,150

<b>Charles River Deanery</b>			
All Saints' Church	Brookline	Cabinets for Crossroads Family Center	\$900
Christ Church	Needham	Circle of Hope	\$450
St. Andrew's Church	Wellesley	Wellesley Knitters	\$500
<b>Concord River Deanery</b>			
Trinity Church	Concord	Parent-Child Group Program	\$300
St. Michael's Church	Holliston	Le Chef	\$650
St. Luke's Church	Hudson	Feeding with Fellowship	\$300
St. Elizabeth's Church	Sudbury	Lincoln Sudbury Wayland Domestic Violence Roundtable	\$800
St. Peter's Church	Weston	Diaper Depot	\$250
<b>Merrimack Valley Deanery</b>			
St. James' Church	Groveland	Diapers for Babies in the Merrimack Valley	\$1,150
St. Anne's Church	Lowell	Computer Training & Conversational English for Immigrants	\$1,150
<b>Mt. Hope/Buzzards Bay Deanery</b>			
St. Andrew's Church	New Bedford	The Baby Project & Singing and Gardening Club	\$2,300
<b>Neponset River Deanery</b>			
Epiphany Church	Walpole	Breaking Bread, A Community Meal	\$2,300
<b>North Shore Deanery</b>			
St. Stephen's Church	Lynn	Community Family Outreach	\$2,000
<b>South Shore Deanery</b>			
Emmanuel Church	Braintree	KidzCloset	\$767
St. Andrew's Church	Hanover	Rehobeth Shelter	\$767
Trinity Church	Marshfield	Carolina Hill	\$767
<b>Taunton River Deanery</b>			
All Saints' Church	Attleboro	One Family, A Mission of Unity	\$2,300
			<b>\$22,251</b>

<b>Sending Serving Deanery Grants</b>	<b>\$48,000</b>
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Congregation	City	Program	Grant Amount
<b>Alewife Deanery</b>			
St. Paul's Church	Bedford	Bedford Food Pantry Community Table	\$400
Christ Church	Cambridge	Outdoor Church	\$600*
St. James' Church	Cambridge	Helping Hand Food Pantry	\$950
St. Peter's Church	Cambridge	CommonCare	\$2,825*
Christ Church	Waltham	Diaper Depot	\$1,725*
<b>Boston Harbor Deanery</b>			
The Cathedral Church of St. Paul	Boston	The Pilgrim Newsletter	\$2,000
St. Stephen's Church	Boston	Bridging the Digital Divide for Families	\$4,500*
<b>Charles River Deanery</b>			
All Saints' Church	Brookline	Mission Trips to Tanga	\$4,000
St. Paul's Church	Brookline	Brookline Emergency Food Pantry	\$2,500*
<b>Merrimack Valley Deanery</b>			
Trinity Church	Haverhill	Academy of Creative Arts at Trinity	\$2,625*
Grace Church	Lawrence	Elementary and Middle School Programming	\$625*
St. Anne's Church	Lowell	Elementary and Middle School Programming	\$625*
St. John's Church	Lowell	KALEIDOSCOPE	\$2,000
St. John's Church	Lowell	Elementary and Middle School Programming	\$625*
<b>Mt. Hope/Buzzards Bay Deanery</b>			
St. Andrew's Church	New Bedford	The Baby Project	\$1,200
St. Andrew's Church	New Bedford	Extension of St. Andrew's Computer Class at Lincoln School	\$1,000
St. Martin's Church	New Bedford	LGBT Ministry	\$1,213
<b>Neponset River Deanery</b>			
Trinity Church	Canton	Clean Water / A Human Right	\$2,000
Epiphany Church	Walpole	Mil Milagros - feeding children in Guatemala	\$2,000

**North Shore Deanery**

St. Peter's Church	Beverly	St. Peter's Outreach Meals	\$1,500*
St. Stephen's Church	Lynn	Hurricane Sandy Mission Trip	\$3,310*

**South Shore Deanery**

St. Stephen's Church	Cohasset	Long Island Shelter meal program	\$1,000
Trinity Church	Marshfield	Sowing Seeds	\$1,000

**Taunton River Deanery**

All Saints' Church	Attleboro	One Family, A Mission of Unity	\$4,000
			<b>\$44,223</b>

\* Represents/includes addendum funding

**Case Trust and Bristol County Fund**

**\$111,707**

<b>Congregation</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
Church of the Holy Spirit	Fall River	Senior Fellowship; Bayside Homeless Ministry; Child Ministry	\$16,300
St. Luke's Church	Fall River	Urban Youth Education and Empowerment	\$9,000
Grace Church	New Bedford	YAC Mission Trip; Grace Church New Bedford Food Pantry	\$20,000
St. Andrew's Church	New Bedford	Early Childhood Initiative	\$20,780
Grace Church	North Attleboro	Empowering Grace	\$25,000
St. Mark's Church	North Easton	Backpack Outreach Program	\$250
Church of Our Saviour	Somerset	Church of Our Saviour Annual Parish Retreat	\$2,000
Christ Church	Swansea	Community Gardening for Children	\$2,380
Bristol Cluster Ministry	Taunton	Cranwood Home; Exploration Retreat; Knitting, Crocheting	\$2,250
St. John's Church	Taunton	VBS, Family Camping, Operation Christmas Child; etc.	\$8,500
St. Thomas' Church	Taunton	Senior Ministry	\$4,540
			<b>\$111,000</b>

**Creation Care Initiative: Simple Acts of Stewardship Grants**

<b>Congregation</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
St. Paul's Church	Brookline	LED bulbs and other energy-efficiency measures	\$1,000
St. James' Church	Cambridge	Weatherization, air sealing, and grading	\$400
All Saints' Church	Chelmsford	Environmental stewardship field trip	\$1,000
St. Andrew's Church	Hanover	Raised vegetable beds; produce to be given away	\$900
St. John's Church	Holbrook	Ceiling fan for narthex	\$825
Grace Church	Medford	Raised beds for food pantries; Vacation Garden School	\$1,000
St. Andrew's Church	New Bedford	Expand community garden	\$516
Grace Church	North Attleboro	New walkway & "green" area in front of church	\$1,000
Trinity Church	Stoughton	Establish 100% organic vegetable plot	\$550
Church of the Good Shepherd	Watertown	Vacation Garden School	\$575
			<b>\$7,766</b>

**Creation Care Initiative: Green Improvement Grants**

<b>Congregation</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
Church of the Good Shepherd	Acton	Energy-efficient propane furnace	\$10,000
All Saints' Church	Attleboro	Gas-fired boiler; zoning & controls; interior storm windows	\$10,000
Parish of the Messiah	Auburndale	Energy-efficient windows; high-efficiency water heater	\$7,300
Emmanuel Church	Boston	Window coverings; insulate pipes; dual-flush toilets	\$7,500
Allston Property	Boston	Energy-efficient furnace; appliances; etc.	\$7,500
St. Peter's Church	Buzzards Bay	Gas stove; insulated door; motion-detecting switches	\$5,000
St. James' Church	Cambridge	Reduce heat loss at stained glass windows	\$5,000
Grace Church	Everett	Replacement windows for kitchen, vestry room, & others	\$7,500
St. Mark's Church	Foxboro	Programmable thermostats; dual-flush toilets; LEDs; etc.	\$9,400
Barbara C. Harris Camp	Greenfield, NH	Energy-efficient windows in Bunkhouse	\$7,500
Ascension Church	Ipswich	Energy-efficient windows in parlor	\$5,000
Church of Our Redeemer	Lexington	Convert oil-fired burners to natural gas	\$7,500
St. Stephen's Memorial Church	Lynn	Energy-efficient windows in classroom wing	\$7,500
St. Michael's Church	Milton	Energy-efficient windows in rectory; zone church heat system	\$7,500
St. Paul's Church	Nantucket	Install three new propane boilers	\$10,000
St. Andrew's Church	New Bedford	Install energy-efficient lighting; new fans for Sanctuary	\$7,200
St. Paul's Church	Newton	Energy-efficient bulbs; new thermostats; efficient windows	\$9,600
St. Mary's Church	Newton Lower Falls	Convert oil-fired steam system to gas-fired hot water system	\$10,000
St. John's Church	Newtonville	Heating system upgrade; lighting improvements; insulation	\$10,000
Grace Church	North Attleboro	Rectory; new windows; insulation; faucet aerators	\$7,500
St. Peter's/San Pedro Church	Salem	New gas boiler & temperature controls	\$10,000
St. John's Church	Saugus	Install high-efficiency boiler & water heater	\$10,000
Church of Our Saviour	Somerset	Energy-efficient windows; glaze & caulk stained glass	\$10,000
St. Elizabeth's Church	Sudbury	Air sealing; insulation; energy-efficient windows & doors	\$7,500
St. John's Church	Westwood	Convert boiler from oil to gas; bring in gas line	\$10,000
All Saints' Church	Whitman	Update lighting; new fans; interior storm windows; etc.	\$7,286
Trinity Church	Wrentham	Replace old oil-fired burner with gas	\$10,000
			<b>\$223,286</b>

<b>Mission Tithe Council Grant</b>			<b>\$25,000</b>
<b>Partnering Congregations</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
St. Paul's Church	Newburyport	Rights-Based Education for Rural Communities at Foundation Cristosal, San Salvador, El Salvador	\$25,000

**Mission Tithe Matching Grants**

<b>Congregation</b>	<b>City</b>	<b>Program Location</b>	<b>Grant Amount</b>
Church of the Good Shepherd	Acton	El Octillo, El Salvador	\$7,225
Christ Church	Andover	CFFL, Haiti	\$10,000
Parish of the Messiah	Auburndale	KwaZulu-Natal, South Africa	\$5,000
Trinity Church	Boston	Nairobi, Kenya	\$10,000
All Saints Parish	Brookline	Tanga, Tanzania	\$10,000
St. Christopher's Church	Chatham	Goll Farm, Liberia	\$7,500
Diocesan Youth Council	Diocesan-Wide	New York City, New York	\$5,000
St. John's Church	Duxbury	El Hogar, Honduras	\$7,250
St. Luke's Church	Fall River	Hamisi, Kenya	\$3,000
Grace Church	Medford	Bogota, Colombia	\$10,000
St. Michael's Church	Milton	New Orleans, Louisiana	\$4,000
St. Paul's Church	Natick	Mpwapwa, Tanzania	\$10,000
Christ Church	Needham	Lazile, Haiti	\$10,000
St. Paul's Church	Newburyport	Cristosal El Salvador	\$10,000
Grace Church	North Attleboro	Tanga, Tanzania	\$10,000
St. Thomas' Church	Taunton	Navajoland, New Mexico	\$7,500
Epiphany Church	Walpole	Mil Milagros, Guatemala	\$10,000
Parish of the Epiphany	Winchester	El Hogar, Honduras	\$10,000
			<b>146,475</b>

**2013 Continuing Education Grants**

<b>Congregation</b>	<b>City</b>	<b>Program</b>	<b>Grant Amount</b>
Church of the Good Shepherd	Acton	Annual Conference of Endowed Episcopal Parishes	\$500
Church of the Advent	Boston	2013 Diaconate Assembly	\$500
Diocesan Offices	Boston	Spiritual Direction Training at Bethany House of Prayer	\$500
MIT Chaplaincy	Boston	Interim Ministry training	\$500
St. Paul's Church	Brookline	Festival of Homiletics	\$500
St. Mark's Church	Foxborough	Celtic Studies Pilgrimage	\$500
St. Andrew's Church	Framingham	Metrowest Leadership Academy	\$500
Christ Church	Hyde Park	Project on Christianity & the Environment	\$500
St. John's Church	Jamaica Plain	Program Certification in Spiritual Direction	\$500
Trinity Church	Melrose	Healthy Congregations Facilitator Training	\$500
Church of St. Mary of the Harbor	Provincetown	Festival of Homiletics Conference	\$500
Church of Our Saviour	Somerset	St. George's College Summer Program	\$500
Grace Church	Vineyard Haven	Diocesan Holy Land Mission trip	\$500
Christ Church	Waltham	Gathering of Episcopal Clergy under age of 50	\$500
Church of the Good Shepherd	Watertown	Formation Mentor Training	\$380
Church of the Good Shepherd	Watertown	"Stirring the Waters" Program	\$200
Church of the Holy Spirit	Wayland	Peace Island Institute's Christian-Muslim Pilgrimage	\$350
			<b>\$7,930</b>

**Sabbatical Funds**

<b>Congregation</b>	<b>City</b>	<b>Grant Amount</b>
The Cathedral Church of St. Paul	Boston	\$6,600
Church of St. John the Evangelist	Duxbury	\$6,600
St. Stephen's Memorial Church	Lynn	\$1,500
Church of St. Mary of the Harbor	Provincetown	\$6,600
		<b>\$21,300</b>

**Bishops' Funds**

Aid to Clergy	19 grants	\$28,730
Aid to Congregations	1 grant	\$22,970
Children's Program not including B-SAFE	1 grant	\$10,000
Mission and Outreach	2 grants	\$91,500
		<b>\$153,200</b>

<b>Clergy Children College Scholarships</b>	14 students	<b>\$46,000</b>
<b>Society for the Relief of Aged or Disabled Clergy</b>	Served 44 clergy	<b>\$121,040</b>
<b>Society for the Relief of Widows, Widowers and Orphans</b>	Served 35 widows	<b>\$74,149</b>

<b>Stokes Fund Loans</b>		<b>As of July 31, 2014</b>	<b>\$2,483,434</b>
88 Loans			
	4 Loans	2-8 months in arrears	
	3 Loans	15+ months in arrears	
	81 Loans	Current	

**Appendix 4: Staff Roster****2014 DIOCESAN STAFF POSITIONS BY AREA**

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

**Budget Committee**

Matthew Cadwell (2014)  
Jim Gammill (2014), Treasurer  
Ellen Sheehy (2014)  
Lynn Smith (2014)  
Virginia Rogers (2015)  
Ted Ts'o (2015)  
Jane Bearden (2016)  
Lisa Garcia (2016)  
Stephen Voysey (2016), Chair

Mally Lloyd, Canon to the Ordinary  
Cathy Menard, Controller  
Laura Simons, Assistant Secretary

# The Protestant Episcopal Diocese of Massachusetts

Financial Statements

Years Ended December 31, 2013 and 2012

# The Protestant Episcopal Diocese of Massachusetts

## FINANCIAL STATEMENTS Years Ended December 31, 2013 and 2012

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## INDEPENDENT AUDITOR'S REPORT

The Protestant Episcopal Diocese of Massachusetts  
Boston, Massachusetts

### **Report on the Financial Statements**

We have audited the accompanying financial statements of The Protestant Episcopal Diocese of Massachusetts (the "Diocese") which comprise the statements of financial position as of December 31, 2013 and 2012, and the related statements of activities, and cash flows for the years then ended and the related notes to the financial statements.

### **Management's Responsibility for the Financial Statements**

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

### **Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Protestant Episcopal Diocese of Massachusetts as of December 31, 2013 and 2012, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

*McGladrey LLP*

Boston, Massachusetts  
February 13, 2015

# The Protestant Episcopal Diocese of Massachusetts

Statements of Financial Position

December 31, 2013 and 2012

	2013	2012
<b>ASSETS</b>		
Cash and cash equivalents	\$ 1,901,914	\$ 2,188,258
Restricted cash	4,850,735	2,456,038
Assessments receivable, less allowance for uncollectible assessments of \$315,835 and \$335,000 as of December 31, 2013 and 2012, respectively	540,683	617,849
Dividends and interest receivable	322,763	332,292
Prepaid expenses and other current assets	60,282	205,083
Due from affiliated entities	450,397	254,770
Pledges receivable, restricted, net	11,988,243	11,306,647
Mortgages and notes receivable, affiliated entities, net of allowance	3,259,322	3,501,337
Investments	34,991,243	30,685,004
Beneficial interest in perpetual trusts	32,232,339	28,012,813
Interests in charitable remainder trusts	566,254	522,384
Pooled income fund	8,229	8,404
Property, buildings and equipment, net	4,286,791	4,466,215
<b>Total assets</b>	<b>\$ 95,459,195</b>	<b>\$ 84,557,094</b>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities:		
Accounts payable and accrued expenses	\$ 548,105	\$ 560,374
Capital lease obligations	19,670	52,112
Due to parishes and other entities from capital campaign, net	9,423,106	7,689,949
Funds held for other beneficiaries and affiliated entities	5,358,943	5,000,038
<b>Total liabilities</b>	<b>15,349,824</b>	<b>13,302,473</b>
Commitments		
Net assets:		
Unrestricted:		
Designated by Diocesan Council - Quasi Endowment	9,230,909	7,974,595
Designated by Diocesan Council - Specified Purposes	1,557,699	1,994,545
Undesignated surplus	6,033,237	5,766,690
	<b>16,821,845</b>	<b>15,735,830</b>
Temporarily restricted	19,346,271	16,106,427
Permanently restricted	43,941,255	39,412,364
<b>Total net assets</b>	<b>80,109,371</b>	<b>71,254,621</b>
	<b>\$ 95,459,195</b>	<b>\$ 84,557,094</b>

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts  
 Statements of Activities  
 Years Ended December 31, 2013 and 2012

	2013				2012			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>Operating</b>								
Revenues, support and other income:								
Support from congregations	\$ 4,860,078	\$ -	\$ -	\$ 4,860,078	\$ 4,929,013	\$ -	\$ -	\$ 4,929,013
Gifts, grants and fees	1,095,594	425,499	-	1,521,093	1,274,429	346,699	-	1,621,128
Investment income:								
Distributed under Diocesan spending policy	286,769	543,666	-	830,435	271,198	532,664	-	803,862
Distributed from DIT trust funds	943,913	324,600	-	1,268,513	960,007	313,265	-	1,273,272
Other	93,302	-	-	93,302	104,287	-	-	104,287
Designated funds made available by Diocesan Council	146,154	-	-	146,154	244,376	-	-	244,376
Contributed services	360,000	-	-	360,000	360,000	-	-	360,000
Net assets released from restrictions	2,348,136	(2,348,136)	-	-	3,480,055	(3,460,055)	-	-
Total revenues, support and other income	10,133,946	(1,054,371)	-	9,079,575	11,603,365	(2,267,427)	-	9,335,938
Expenses:								
Support to Episcopal Church	949,645	-	-	949,645	949,056	-	-	949,056
Deaneries, congregations and clergy	1,128,450	-	-	1,128,450	1,059,636	-	-	1,059,636
Congregational resources and training	1,057,678	-	-	1,057,678	944,508	-	-	944,508
Strategic ministries	3,608,840	-	-	3,608,840	3,307,258	-	-	3,307,258
Due to parishes and other entities from capital campaign, net	1,436,553	-	-	1,436,553	1,359,282	-	-	1,359,282
Administrative services	1,546,145	-	-	1,546,145	1,527,638	-	-	1,527,638
Bishop's discretionary expenses	533,441	-	-	533,441	694,103	-	-	694,103
Contributed services	360,000	-	-	360,000	360,000	-	-	360,000
Bad debt expense	52,425	-	-	52,425	228,136	-	-	228,136
Depreciation	226,469	-	-	226,469	214,387	-	-	214,387
Total expenses	10,899,646	-	-	10,899,646	10,644,004	-	-	10,644,004
Increase (decrease) in net assets from operations	(765,700)	(1,054,371)	-	(1,820,071)	959,361	(2,267,427)	-	(1,308,066)
<b>Non-operating</b>								
Other income, gains (expenses) and (losses):								
Net revolving loan fund interest	-	-	49,350	49,350	-	-	13,322	13,322
Investment income on endowment investments, net of spending policy	1,010,597	1,980,860	216,320	3,207,777	412,493	1,081,414	18,880	1,512,787
Designated funds made available by Diocesan Council	(146,154)	-	-	(146,154)	(244,376)	-	-	(244,376)
Contributions - capital campaign	-	2,313,355	-	2,313,355	-	5,472,595	-	5,472,595
Capital campaign expenses	(215,520)	-	-	(215,520)	(1,139,331)	-	-	(1,139,331)
Gain from sale of property from closed parishes	1,200,654	-	-	1,200,654	500,353	-	-	500,353
Change in value of beneficial trusts	-	-	4,263,221	4,263,221	-	-	2,079,785	2,079,785
Contribution received from outside trusts	-	-	-	-	-	-	10,112	10,112
Other investment income	53,182	-	-	53,182	163,957	-	-	163,957
Other income (expense), net	(51,044)	-	-	(51,044)	2,088	-	-	2,088
Total other changes in net assets	1,851,715	4,294,215	4,528,891	10,674,821	(304,816)	6,554,009	2,122,099	8,371,292
Changes in net assets	1,086,015	3,239,844	4,528,891	8,854,750	654,545	4,286,582	2,122,099	7,063,226
Net assets at beginning of year	15,735,830	16,106,427	39,412,364	71,254,621	15,081,285	11,819,845	37,290,265	64,191,395
Net assets at end of year	\$ 16,821,845	\$ 19,346,271	\$ 43,941,255	\$ 80,109,371	\$ 15,735,830	\$ 16,106,427	\$ 39,412,364	\$ 71,254,621

See notes to financial statements.

# The Protestant Episcopal Diocese of Massachusetts

Statements of Cash Flows

Years Ended December 31, 2013 and 2012

	2013	2012
Cash flows from operating activities:		
Change in net assets	\$ 8,854,750	\$ 7,063,226
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation	226,469	214,387
Gain on sale of property from closed parishes	(1,200,654)	(500,353)
Realized and unrealized investment gains	(3,752,379)	(2,133,665)
Change in split-interest agreements	(4,263,221)	(2,079,785)
Net (Recovery) provision for mortgage notes receivable allowance	(23,852)	35,740
Changes in operating assets and liabilities:		
Dividends and interest receivable	9,529	(4,381)
Assessments receivable	77,166	379,221
Pledges receivable	(681,596)	(6,198,594)
Due from affiliated entities	(369,446)	(210,007)
Due to affiliated entities	-	(39,184)
Prepaid expenses and other current assets	144,801	(155,285)
Accounts payable and accrued expenses	(12,269)	(225,088)
Due to parishes and other entities from capital campaign	1,733,157	5,504,349
Change in funds held for other beneficiaries and affiliated entities	358,905	224,319
Net cash provided by operating activities	<u>1,101,360</u>	<u>1,874,900</u>
Cash flows from investing activities:		
Net increase in restricted cash	(2,394,697)	(585,213)
Additions to property, buildings and equipment	(47,045)	(41,379)
Mortgage loans granted, net of repayments	252,770	235,739
Loans issued from Stokes Fund	(517,000)	(161,779)
Payments received on Stokes Fund loans	530,097	375,415
Proceeds from sale of property from closed parishes	1,374,473	702,083
Purchases of investments	(3,221,224)	(5,272,555)
Sales of investments	2,667,364	3,784,807
Net cash used in investing activities	<u>(1,355,262)</u>	<u>(962,882)</u>
Cash flows from financing activities:		
Payments on capital lease obligations	(32,442)	(28,512)
Net increase in cash and cash equivalents	<u>(286,344)</u>	<u>883,506</u>
Cash and cash equivalents, beginning of year	<u>2,188,258</u>	<u>1,304,752</u>
Cash and cash equivalents, end of year	<u>\$ 1,901,914</u>	<u>\$ 2,188,258</u>
<b>Supplemental disclosure on non-cash flow information:</b>		
Equipment acquired with capital leases	<u>\$ -</u>	<u>\$ 25,629</u>
Cash paid during the year for interest	<u>\$ 4,806</u>	<u>\$ 8,686</u>

See notes to financial statements.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements  
Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

### Organization

The Protestant Episcopal Diocese of Massachusetts (the "Diocese") was established in 1784 and is among the largest dioceses in terms of membership in the Episcopal Church. The Diocese is governed by an elected Bishop advised by Diocesan Council.

### Basis of Presentation

The financial statements of the Diocese have been prepared on the accrual basis of accounting and in accordance with accounting standards set by the Financial Accounting Standards Board ("FASB"). The FASB sets generally accepted accounting principles ("GAAP") to ensure financial condition, results of operations, and cash flows are consistently reported. References to GAAP issued by the FASB in these footnotes are to the FASB Accounting Standards Codification ("ASC").

The Diocese's financial statement presentation follows the recommendations of FASB ASC 958, "Financial Statements of Not-for-Profit Organizations". Under ASC 958, the Diocese is required to report information regarding its financial position and activities according to three classes of net assets, determined by donor-imposed restrictions, as follows:

### Unrestricted Net Assets

Unrestricted net assets represent a portion of net assets of the Diocese that is neither permanently restricted nor temporarily restricted by donor imposed stipulations. Unrestricted net assets include expendable funds available for support of the Diocese as well as funds invested in property, buildings and equipment. In addition, unrestricted net assets of the Diocese include funds which represent unrestricted resources designated by the Diocesan Council for quasi endowment or specified purposes.

### Temporarily Restricted Net Assets

Temporarily restricted net assets represent contributions and other inflows of assets whose use by the Diocese is limited by donor-imposed stipulations that either expire by the passage of time or can be fulfilled and removed by actions of the Diocese pursuant to those stipulations. Temporarily restricted net assets also include, under Massachusetts law, amounts, representing cumulative interest, dividends, appreciation and reinvested gains on permanently restricted endowment funds, which are subject to prudent appropriation by the Board in accordance with donor use restrictions and provisions of Massachusetts law but which have not yet been appropriated by the Diocesan Council.

### Permanently Restricted Net Assets

Permanently restricted net assets represent contributions and other inflows of assets whose use by the Diocese is limited by donor-imposed stipulations that neither expire by the passage of time nor can be fulfilled and removed by actions of the Diocese pursuant to these stipulations.

### Accounting Estimates

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect certain reported amounts of assets and liabilities, revenues, support and expenses, and the disclosure of contingent assets and liabilities. The more significant items presented herein affected by the use of estimates are the allowances for uncollectible assessment receivables and pledges receivable, discount on pledges receivable and depreciable lives of buildings and equipment. Actual results could differ from those estimates.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES ...continued

### Liquidity

In order to provide information about liquidity, assets are sequenced according to their nearness of conversion to cash and liabilities according to their nearness to their estimated maturity.

### Contributions

The Diocese reports gifts of cash and other assets as restricted support if they are donor-restricted as to purpose or time. When a donor restriction expires, that is when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statements of activities as net assets released from restrictions. Contributions subject to donor-imposed restrictions met in the same reporting period as they are received are reported as temporarily restricted revenues and then released from restriction.

The Diocese reports gifts of land, buildings and equipment at fair value as unrestricted support unless explicit donor stipulations specify how the donated assets must be used. Gifts of long-lived assets with explicit restrictions that specify how the assets are to be used are reported as restricted support. Absent explicit donor stipulations about how long those long-lived assets must be maintained, the Diocese reports expirations of donor restrictions in the period the asset is sold.

Contributions, including unconditional promises to give, are initially recognized as revenues at fair value in the period the promise is received. Conditional promises to give are not recognized until they become unconditional, that is, at the time when the conditions on which they depend are substantially met. Contributions of assets other than cash are reported at their estimated fair value. Contributions to be received after one year are discounted at an appropriate discount rate commensurate with the risk involved. Amortization of discount is recorded as additional contribution revenue in accordance with donor-imposed restrictions, if any, on the contributions.

An allowance for uncollectible contributions receivable is provided based upon management's judgment of potential defaults. The determination includes such factors as prior collection history, type of contribution and nature of fund raising activity. Accounts are charged against the allowances when management believes that the collectability of the specific accounts is unlikely.

### Beneficial Interest in Charitable Trusts

The Diocese is the beneficiary of a number of charitable trusts (split interest agreements), which are included in beneficial interest in charitable trusts on the statement of financial position. The Diocese initially recognizes a contribution as well as an interest in the underlying investment from which a specified amount or percentage of the fair value of the trusts' assets or income each year is currently being paid to the Diocese (perpetual trust) or to the donor or named beneficiary (remainder trust).

Actuarial methods are used to calculate that portion of the investment representing the present value of the liability to the donor and that portion representing the contribution.

For agreements and trust assets maintained by an outside trustee, the Diocese includes in the beneficial interest in charitable trusts the value of the estimated future benefits to be received when the assets are distributed. Adjustments to reflect the changes in the fair value of the investments, revaluation of the present value of the estimated future payments to the donors and or donors' stated beneficiaries, and changes in actuarial assumptions during the term of the trust are made to the related assets and are recognized as changes in the value of split interest agreements in their respective net asset classes.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES ...continued

### Endowment and Diocesan Council Designated Endowment Funds

The Diocese follows FASB ASC 958, "Financial Statements of Not-for-Profit Organizations", regarding the classification of donor-restricted endowment funds subject to the Uniform Prudent Management of Institutional Funds Act ("UPMIFA"). This standard provides guidance on the net asset classification of donor-restricted endowment funds for a not-for-profit organization that is subject to an enacted version of UPMIFA. UPMIFA is a model act approved by the Uniform Law Commission that serves as a guideline for states to use in enacting legislation. This position also requires disclosures about an organization's endowment funds (both donor-restricted endowment funds and board-designated endowment funds), whether or not the organization is subject to UPMIFA.

The Diocese has interpreted UPMIFA as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Diocese classifies as permanently restricted net assets (a) the original value of gifts donated, (b) the original value of subsequent gifts and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Diocese in a manner consistent with the standard of prudence prescribed in UPMIFA.

In accordance with UPMIFA, the Diocese considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- The duration and preservation of the fund
- The purposes of the Diocese and the donor-restricted endowment fund
- General economic conditions
- The possible effect of inflation and deflation
- The expected total return from income and the appreciation of investments
- Other resources of the Diocese
- The investment policies of the Diocese

### Cash and Cash Equivalents

The Diocese considers cash and cash equivalents to include all highly-liquid investments (other than those held for long term purposes) with original maturity dates of less than three months. The Diocese maintains some of its cash in bank deposit accounts, which at times may exceed federally insured limits. The Diocese has not experienced any losses in such accounts. The Diocese believes it is not exposed to any significant credit risk on cash and cash equivalents.

### Restricted Cash

Restricted cash at December 31, 2013 and 2012 includes approximately \$4.9 million and \$2.5 million, respectively, restricted by the Diocesan Council related to proceeds from closed parishes for future consideration, capital campaign contributions received and not spent, and distributions owed to beneficiaries.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES...continued

### Receivables

Assessments receivable, mortgages receivable, and notes receivable are stated net of allowances for doubtful accounts, when necessary, which are reported on the face of the Diocese's statements of financial position or in the notes to the financial statements. The allowances are established via provisions for bad debts charged to operations. On a periodic basis, management evaluates its receivables and establishes or adjusts its allowances to amounts that it believes will be adequate to absorb possible losses on accounts that may become uncollectible, based on evaluations of the collectability of individual accounts, the Diocese's history of prior loss experience and on current economic conditions. Accounts are charged against the allowances when management believes that the collectability of the specific accounts are unlikely.

Mortgages receivable and notes receivable are placed on nonaccrual status when management believes, after considering economic conditions, business conditions, and collection efforts that loans are impaired or collection of interest is doubtful. Uncollected interest previously accrued is charged off or an allowance is established by a charge to interest income. Interest income on nonaccrual loans is recognized only to the extent cash payments are received. Loans are classified as nonperforming, and considered impaired when they are over 90 days past due. Generally, loans are restored to performing status when the obligation is brought current, has performed in accordance with the contractual terms for a reasonable period of time and the ultimate collectability of the total contractual principal and interest is no longer in doubt.

Interest earned on mortgage notes receivable is recognized over the term of the mortgage note and is calculated using the simple interest method on principal amounts outstanding.

### Grants

The Diocesan Council makes grants to organizations for various charitable purposes, principally within the Diocese of Massachusetts. Grants are recorded as expense in the period when the commitment is made.

### Contributed Services

Support arising from contributed services to the Diocese has been recognized at estimated fair value in the accompanying financial statements with an equal amount recognized as expense, if the services provided require special skills and would need to be purchased by the Diocese if not contributed. The computation of the value of the contributed services represents the estimated comparable compensation that would be paid to persons if they were employees.

### Property, Buildings and Equipment

Property, buildings and equipment are carried at historical cost less accumulated depreciation. Depreciation on buildings and equipment is charged as a non-operating expense. Depreciation is computed using the straight-line method over the estimated useful lives of buildings, principally 40 to 50 years, and equipment, 3 to 5 years. Betterments, renewals and extraordinary repairs that extend the life of the asset are capitalized; other repairs and maintenance are expensed.

### Asset Retirement Obligation

The Diocese follows FASB ASC 410, "Asset Retirement and Environmental Obligations"; this standard requires a liability be recorded at fair value specific to certain legal environmental obligations. The recording of a liability is required if such conditions exist and the obligation can be reasonably estimated. As of December 31, 2013 and 2012, the Diocese is unaware of any such obligations. The Diocese will recognize a liability in the period in which it becomes aware of such liability and sufficient information is available to reasonably estimate the fair value.



# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES...continued

### Impairment of Long-Lived Assets

Long-lived assets, which consist primarily of property, buildings, and equipment, are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount of the asset may not be recoverable. When such events occur, the Diocese compares the carrying amounts of the assets to the undiscounted expected future cash flows over the remaining life of the asset. If this comparison indicates that there may be impairment, the amount of impairment is calculated as the difference between the carrying value and fair value. During the fiscal years ended December 31, 2013 and 2012, no impairment indicators were identified.

### Non-Operating Activities

Non-operating activities reflect transactions of a long-term investment or capital nature, including donations to be invested by the Diocese to generate a return that will support future operations, unrealized and realized investment gains or losses, gains or losses on sales of property and gains or losses on sales of investments, capital campaign expenses, and contributions received from trust funds.

### Support from Congregations

The Diocese receives support from parishes and missions in the form of assessment payments. Assessment payments are mandatory for parishes in union with Convention.

### Designated Funds Made Available from the Diocesan Council

Designated funds made available from the Diocesan Council represent funds expended from the Diocese's non-endowment funds that are designated for specified purposes by the Diocesan Council. These funds are created from the net proceeds realized from church closings.

### Investment Policy

The Diocese has adopted an investment policy for its endowment funds with an asset allocation of 50% to 70% of portfolio value in stock and equivalents with a target of 60% and 30% to 50% of portfolio value in fixed income with a target of 40%. Movements within the ranges will be based on periodic assessment of the relative valuation of the different asset classes, as well as economic outlook. The Executive Committee of the Diocesan Council can authorize exceptional moves outside the range. As of December 31, 2013 and 2012, the custodian for the majority of the Diocese's investments was the Diocesan Investment Trust ("DIT"). The investments were invested in the DIT's Stock Fund and Income Fund.

The investment performance of the "Stock Fund" is expected to rank consistently in the top half of the Independent Consultants Cooperative ("ICC") Global Equity Funds Universe, while the investment performance of the Income Fund is expected to rank consistently in the top half of the ICC Fixed Income Universe. The performances of managers hired to administer particular Stock Fund and the Income Fund portfolios are evaluated against the performances of other managers with similar styles and benchmarks. Actively managed portfolios are expected regularly to outperform their benchmark indices – e.g., a mid-cap value manager would be expected to outperform the Russell 2000 Value Index.

The investment policies attempt to provide a predictable stream of funding for its funds while seeking to maintain the purchasing power of endowment assets.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES...continued

### Spending Policy

The Diocesan Council has established a spending policy for its endowment funds and those funds for which it is an income beneficiary. The policy establishes a target endowment income. The income used under the spending policy is reflected as release from restriction in the statements of activities. Additionally, the policy establishes an upper and lower limit to keep the target responsive to changes in the market value of the endowment.

During 2013 and 2012, the upper limit was 5.5% and the lower limit was 3.5% of the average three years' fair value of the endowment. Income earned under the policy in excess of targeted earnings is available for distribution under the policy should earned income be less than the target in subsequent years. Amounts earned in excess of the target are included in temporarily restricted net assets in the statements of activities. This is consistent with the Diocese's objective to maintain the purchasing power of the endowment assets held in perpetuity as well as to provide additional real growth through investment return.

### Investments and Investment Income

Investments in equity securities and fixed income mutual funds with readily determinable fair market values and all investments in debt securities are reported at fair value and is based on quoted market prices.

Investment in real estate investment trust represents a real estate partnership which is reported at the lower of cost or market as the investment does not have a readily determinable fair value.

Investment in the Diocesan Investment Trust consists of investments in a stock fund and a bond fund which are reported at fair value using the Net Asset Value ("NAV") as a practical expedient.

Investment income and gains (losses) from unrestricted investments are reported as unrestricted revenue. Investment interest and gains (losses) on investments of temporarily restricted net assets are reported as increases (decreases) in temporarily restricted net assets. Investment income and gains (losses) on investments of permanently restricted net assets are reported as increases (decreases) in temporarily restricted net assets unless permanently restricted by the donor, in which case they are recorded as increases (decreases) in permanently restricted net assets.

Investments, in general, are exposed to various risks, such as interest rate, credit, and overall market volatility. As such, it is reasonably possible that changes in the values of investments will occur in the near term and that such changes could materially affect the amounts reported in the statements of financial position and statements of activities and changes in net assets.

### Advertising

The Diocese's policy is to expense advertising costs as incurred.

### Income Tax Status

The Diocese is a tax exempt organization under Section 501(c)(3) of the Internal Revenue Code, which provides for the exemption of organizations that are organized and operated exclusively for religious, charitable, scientific, literary or educational purposes, and whose net earnings do not inure to the benefit of any private shareholder or individual.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements  
Years Ended December 31, 2013 and 2012

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## 1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES...continued

### Uncertainty of Income Taxes

The Diocese follows FASB ASC 740, *Income Taxes*, which clarifies the accounting for uncertainty in income taxes by prescribing the recognition threshold a tax position is required to meet before being recognized in the financial statements. The Diocese recognizes a tax benefit from an uncertain tax position only if it is more likely than not that the tax position will be sustained on examination by taxing authorities. Management evaluated the Diocese's tax positions and concluded that the Diocese has no material uncertainties in income taxes.

The Diocese is no longer subject to income tax examinations by the U.S. federal, state, or local tax authorities for fiscal years before 2010.

The Diocese will account for interest and penalties related to uncertain tax positions, if any, as part of tax expense.

### Reclassifications

Certain reclassifications have been made to the 2012 financial statements to conform to the 2013 presentation.

### Recently Issued Accounting Pronouncements

In October 2012, the FASB issued ASU 2012-05, "Not-for-Profit Entities: Classification of the Sale Proceeds of Donated Financial Assets in the Statement of Cash Flows". This guidance requires a not-for-profit entity to classify cash receipts from the sale of donated financial assets consistently with cash donations received in the statement of cash flows if those cash receipts were from the sale of donated financial assets that upon receipt were directed without any not-for-profit entity-imposed limitations for sale and were converted nearly immediately into cash. Accordingly, the cash receipts from the sale of those financial assets should be classified as cash inflows from operating activity, unless the donor restricted the use of the contributed resources to long-term purposes, in which case those cash receipts should be classified as cash flows from financing activities. This guidance is effective prospectively for fiscal years, and interim periods within those years, beginning after June 15, 2013. The adoption of this guidance is not expected to have a material impact on the Diocese's financial statements.

In May 2014, the FASB issued ASU 2014-09, "Revenue from Contracts with Customers (Topic 606)", requiring an entity to recognize the amount of revenue to which it expects to be entitled for the transfer of promised goods or services to customers. The updated standard will replace most existing revenue recognition guidance in U.S. GAAP when it becomes effective and permits the use of either a full retrospective or retrospective with cumulative effect transition method. The updated standard will be effective for annual reporting periods beginning after December 15, 2017, and interim periods with annual periods beginning after December 15, 2018. Early implementation is not permitted. The Diocese has not yet selected a transition method and is currently evaluating the effect that the updated standard will have on the financial statements.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 2. INVESTMENTS

As of December 31, 2013 and 2012 the Diocese had approximately 89% and 94% of its investments invested with DIT, an affiliated organization. DIT was established as an investment vehicle for the Diocese, as well as for parishes and other organizations within the Diocese. DIT is managed by Trustees of Donations to the Protestant Episcopal Church. The Diocese receives quarterly income distributions from DIT.

The Diocese's investments consist of the following at December 31:

	<u>2013</u>	<u>2012</u>
Diocesan Investment Trust – Stock Fund	\$ 20,408,504	\$ 17,077,627
Diocesan Investment Trust – Income Fund	10,691,570	11,711,825
Domestic equity securities	1,308,569	1,087,319
Foreign equity securities	-	256,102
Real estate investment trust	34,534	41,063
Mutual funds	-	19,860
Bond funds	<u>2,548,066</u>	<u>491,208</u>
Total investments	<u>\$ 34,991,243</u>	<u>\$ 30,685,004</u>

The investment in the real estate investment trust is illiquid and is carried at adjusted cost at December 31, 2013 and 2012. As of December 31, 2013 and 2012, there were no unfunded commitments outstanding.

Investment return from these investments for the years ended December 31, 2013 and 2012 is summarized as follows:

	<u>2013</u>	<u>2012</u>
Non-endowment return:		
Interest and dividends	\$ 3,275	\$ 10,211
Investment fees	(2,293)	(2,535)
Realized and unrealized gains	<u>52,200</u>	<u>156,281</u>
	<u>\$ 53,182</u>	<u>\$ 163,957</u>
Endowment return:		
Interest and dividends	\$ 505,910	\$ 483,732
Investment fees	(167,877)	(145,831)
Realized and unrealized gains	<u>3,700,179</u>	<u>1,977,384</u>
	4,038,212	2,315,285
Appropriation of spending policy	<u>(830,435)</u>	<u>(802,498)</u>
Investment income from endowment Investments, net of spending policy	<u>\$ 3,207,777</u>	<u>\$ 1,512,787</u>

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 3. FAIR VALUE MEASUREMENTS

Under the FASB's authoritative guidance on fair value measurements, fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. In determining fair value, the Diocese uses various methods including market, income and cost approaches. Based on these approaches, the Diocese often utilizes certain assumptions that market participants would use in pricing the asset or liability, including assumptions about risk and or the risks inherent in the inputs to the valuation technique. These inputs can be readily observable, market corroborated, or generally unobservable. The Diocese utilizes valuation techniques that maximize the use of observable inputs and minimize the use of unobservable inputs. Based on the observability of the inputs used in the valuation techniques the Diocese is required to provide the following information according to the fair value hierarchy. The fair value hierarchy ranks the quality and reliability of the information used to determine fair values. Financial assets and liabilities carried at fair value will be classified and disclosed in one of the following three categories:

- Level 1 - Quoted prices for identical assets and liabilities traded in active exchange markets, such as the New York Stock Exchange.
- Level 2 - Observable inputs other than Level 1 including quoted prices for similar assets or liabilities, quoted prices in less active markets, or other observable inputs that can be corroborated by observable market data. Level 2 can also include derivative contracts whose value is determined using a pricing model with observable market inputs or can be derived principally from or corroborated by observable market data. Level 2 also includes investments carried at the per share net asset value with redemption periods of less than 90 days.
- Level 3 - Unobservable inputs supported by little or no market activity for financial instruments whose value is determined using pricing models, discounted cash flow methodologies, or similar techniques, as well as instruments for which the determination of fair value requires significant management judgment or estimation; also includes observable inputs for nonbinding single dealer quotes not corroborated by observable market data. Level 3 also includes investments carried at the per share net asset value with redemption periods of more than 90 days.

In some instances, the inputs used to measure fair value may fall into different levels of the fair value hierarchy. In such instances, the inputs are based on the lowest level of input that is significant to the fair value measurement.

During the year ended December 31, 2013 and 2012, there were no changes to the Diocese's valuation techniques that had, or are expected to have, a material impact on its statements of financial position or statement of activities.

The Diocese has various process and controls in place to ensure that fair value is reasonably estimated.

While the Diocese believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different estimate of fair value at the reporting date.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

### 3. FAIR VALUE MEASUREMENTS...continued

The following is a description of the valuation methodologies used for instruments measured at fair value:

#### Equity Securities and Bond Funds

The fair value of equity securities and bond funds is the market value based on quoted market prices, when available, or market prices provided by recognized broker dealers. If listed prices or quotes are not available, fair value is based upon externally developed models that use unobservable inputs due to the limited market activity of the instrument.

#### Interests in Charitable Remainder Trusts and Pooled Income Fund

The fair value of interests in charitable remainder trusts and the pooled income fund is based on quoted market prices and present value techniques using a discount rate of 4.85% and 3.90% at December 31, 2013 and 2012, respectively.

The following table summarizes the valuation of the Diocese's assets measured at fair value on a recurring basis by the fair value hierarchy levels as of December 31:

	2013			Total
	Level 1	Level 2	Level 3	
Investments:				
Diocesan Investment Trust				
Stock Fund	\$ -	\$ 20,408,504	\$ -	\$ 20,408,504
Diocesan Investment Trust				
Income Fund	-	10,691,570	-	10,691,570
Domestic equities	1,308,569	-	-	1,308,569
Bond funds	<u>2,548,066</u>	<u>-</u>	<u>-</u>	<u>2,548,066</u>
	3,856,635	31,100,074	-	34,956,709
Beneficial interest in				
perpetual trusts	-	-	32,232,339	32,232,339
Pooled income fund	8,229	-	-	8,229
Interests in charitable				
remainder trusts	<u>-</u>	<u>-</u>	<u>566,254</u>	<u>566,254</u>
	<u>\$ 3,864,864</u>	<u>\$ 31,100,074</u>	<u>\$ 32,798,593</u>	<u>\$ 67,763,531</u>
Total investments at fair value	\$ 34,956,709			
Other investments	<u>34,534</u>			
Total investments	<u>\$ 34,991,243</u>			

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 3. FAIR VALUE MEASUREMENTS...continued

	2012			Total
	Level 1	Level 2	Level 3	
Investments:				
Diocesan Investment Trust				
Stock Fund	\$ -	\$ 17,077,627	\$ -	\$ 17,077,627
Diocesan Investment Trust				
Income Fund	-	11,711,825	-	11,711,825
Domestic equities	1,087,319	-	-	1,087,319
Foreign equities	256,102	-	-	256,102
Mutual funds	19,860	-	-	19,860
Bond funds	491,208	-	-	491,208
	<u>1,854,489</u>	<u>28,789,452</u>	<u>-</u>	<u>30,643,941</u>
Beneficial interest in				
perpetual trusts	-	-	28,012,813	28,012,813
Pooled income fund	8,404	-	-	8,404
Interests in charitable				
remainder trusts	-	-	522,384	522,384
	<u>\$ 1,862,893</u>	<u>\$ 28,789,452</u>	<u>\$ 28,535,197</u>	<u>\$ 59,187,542</u>
Total investments at fair value	\$ 30,643,941			
Other investments	<u>41,063</u>			
Total investments	<u>\$ 30,685,004</u>			

The changes in beneficial interests in perpetual trusts and interests in charitable remainder trusts measured at fair value for which the Diocese has used Level 3 inputs to determine fair value is as follows at December 31:

	2013	2012
Balance, beginning of year	\$ 28,535,197	\$ 26,445,162
Investment income	584,009	612,533
Realized gains	1,263,676	637,552
Unrealized gains relating to instruments		
still held at the reporting date	3,680,574	2,030,075
Investment fees	(217,979)	(201,746)
Sales	(1,046,884)	(989,710)
Contributions	-	1,331
Balance, end of year	<u>\$ 32,798,593</u>	<u>\$ 28,535,197</u>

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

### 3. FAIR VALUE MEASUREMENTS...continued

The following table presents quantitative information about Level 3 fair value measurements as of December 31:

	Fair Value 2013	Valuation Technique	Level 3 Unobservable Input	Range of Inputs
Beneficial interest in perpetual trusts	<u>\$ 32,232,339</u>	Market approach based on underlying securities	None	N/A
Interests in Charitable Remainder Trusts	<u>\$ 566,254</u>	Value of underlying assets and present value techniques	Rate of Return Discount Rate Life Expectancy	5% 4.85% 2.01-4.33 years

	Fair Value 2012	Valuation Technique	Level 3 Unobservable Input	Range of Inputs
Beneficial interest in perpetual trusts	<u>\$ 28,012,813</u>	Market approach based on underlying securities	None	N/A
Interests in Charitable Remainder Trusts	<u>\$ 522,384</u>	Value of underlying assets and present value techniques	Rate of Return Discount Rate Life Expectancy	5% 3.90% 6.68-7.17 years

The Diocese uses the NAV to determine the fair value of all the underlying investments, which (a) do not have a readily determinable fair value and (b) prepare their financial statements consistent with the measurement principles of an investment company. The following table lists investments in investment companies by major category:

	2013 NAV in Funds	2012 NAV in Funds	Number of Funds	Redemption Frequency	Redemption Restrictions
Diocesan Investment Trust Stock Fund (a)	\$20,408,504	\$17,077,627	1	Quarterly	Monthly
Diocesan Investment Trust Income Fund (b)	10,691,570	11,711,825	1	Quarterly	Monthly
Beneficial Interest in Perpetual Trusts (a) (b)	<u>32,232,339</u>	<u>28,012,813</u>	<u>2</u>	Illiquid*	N/A
	<u>\$63,332,413</u>	<u>\$56,802,265</u>	<u>4</u>		

(a) The fund was established to offer a professionally managed investment vehicle within the equity markets and is expected to fluctuate in value over shorter-term horizons, but to provide superior real (after inflation) growth of principle over longer-term horizons. Total return for the fund shall consistently rank in the top half of the Independent Consultants ("ICC") Equity Specialty Fund Universe.



# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements  
Years Ended December 31, 2013 and 2012

### 3. FAIR VALUE MEASUREMENTS...continued

(b) The purpose of the fund is to provide a consistent high level of income over time similar to what may be produced in the broadly defined investment grade taxable bond markets. The fund is expected to earn, net of fees, above the Citicorp Broad Investment Grade (BIG) Index, and to consistently rank in the top half of the ICC Fixed Income Universe.

\* These assets are held by a third-party trustee. The Diocese only receives distributions in accordance with associated trust documents, but has no control over the assets.

There were no unfunded commitments or other redemption restrictions as of December 31, 2013 and 2012.

### 4. MORTGAGES RECEIVABLE AND NOTES RECEIVABLE, AFFILIATED ENTITIES

Mortgages receivable and notes receivable are due from various affiliated organizations and are collateralized by the real estate and consist of the following at December 31:

	<u>2013</u>	<u>2012</u>
Performing loans	\$ 3,103,763	\$ 3,302,188
Nonperforming loans	<u>226,799</u>	<u>294,241</u>
	3,330,562	3,596,429
Less – allowance for doubtful accounts	<u>(71,240)</u>	<u>(95,092)</u>
	<u>\$ 3,259,322</u>	<u>\$ 3,501,337</u>

Performing loans are those which are less than 90 days past due. Nonperforming loans are those which are greater than or equal to 90 days past due.

The aging of the mortgages receivable and notes receivable as of December 31 is presented as follows:

	<u>Current</u>	<u>1-60 Days</u>	<u>60-90 Days</u>	<u>90+ Days Past Due</u>	<u>Total Past Due</u>
2013	<u>\$ 3,045,862</u>	<u>\$ 57,901</u>	<u>\$ -</u>	<u>\$ 226,799</u>	<u>\$ 226,799</u>
2012	<u>\$ 3,057,831</u>	<u>\$ 213,150</u>	<u>\$ 31,207</u>	<u>\$ 294,241</u>	<u>\$ 294,241</u>

Changes in allowance for doubtful accounts on mortgage notes receivable during years ended December 31 is presented as follows:

	<u>2013</u>	<u>2012</u>
Balance, beginning	\$ 95,092	\$ 75,835
Provisions charged to expense	-	34,165
Loans charged off	<u>(23,852)</u>	<u>(14,908)</u>
Balance, ending	<u>\$ 71,240</u>	<u>\$ 95,092</u>

Included in mortgage notes receivable are mortgages of the Stokes Fund, a restricted net asset revolving loan fund, which provides interest-bearing loans to parishes and affiliated organizations for capital improvements and repairs. At December 31, 2013 and 2012, Stokes Fund loans outstanding of \$2,563,260 and \$2,576,357, respectively, bear interest at rates ranging from 3.5% to 3.75% and mature at various dates through 2027. The recorded allowance for uncollectible loans in the Stokes Fund totaled \$10,000 at December 31, 2013 and 2012.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 4. MORTGAGES RECEIVABLE AND NOTES RECEIVABLE, AFFILIATED ENTITIES...continued

The following Stokes loans were made during 2013:

St. Mark's Church - Foxboro	\$ 111,000
St. Christopher's Church – Chatham	100,000
St. Peter's Church – Salem	100,000
Trinity Church – Marshfield Hills	70,000
Parish of the Epiphany - Winchester	65,000
Christ Church – Medway	36,000
Church of the Advent – Medfield	20,000
Church of the Good Shepherd - Acton	<u>15,000</u>
	<u>\$ 517,000</u>

The following Stokes loans were made during 2012:

St. Stephen's - Boston	\$ 90,000
St. Luke's/San Lucas - Chelsea	51,779
St. Peter's – Buzzards Bay	<u>20,000</u>
	<u>\$ 161,779</u>

The Diocese has granted mortgage notes collateralized by real estate, principally from board-designated, unrestricted net assets, to certain clergy on the staff of the Diocese and to three congregations totaling approximately \$767,000 and \$964,000 as of December 31, 2013 and 2012, respectively. These loans bear interest from 4% to 5.5% and mature at various dates through 2039.

## 5. PLEDGES RECEIVABLE, RESTRICTED

During 2011, the Diocese commenced their Together Now capital campaign with the goal of raising \$20 million from donors and is acting as an agent relative to certain initiatives where funds are being raised for the benefit of certain parishes and other entities affiliated with the Diocese. Under the plan of the campaign, the Diocese intends on using the net monies raised and collected to fund various strategic initiatives in accordance with the following percentage breakdown:

Equipping congregations for strategic local mission	45%
Transforming the Cathedral Church of St. Paul	20%
Tithing for mission beyond the Diocese	10%
Environmental initiatives	10%
Endowing the Barbara C. Harris Center	10%
Establishing a mission institute	5%

Parish participation is primarily through means of a collaborative campaign whereby congregations are able to raise funds for their own capital or programmatic needs while supporting the diocesan campaign. The parish collaborative campaign is managed by a consultant from the campaign office with no out-of-pocket costs to the parish. The diocese will receive 30% of all funds collected and the parish will receive the remaining 70% less a 3% charge for administration of pledge processing.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements  
Years Ended December 31, 2013 and 2012

## 5. PLEDGES RECEIVABLE, RESTRICTED...continued

At December 31, 2013 and 2012, the Diocese owed \$9,423,106 and \$7,689,949, respectively, to parishes and other entities from funds raised through the Together Now capital campaign.

Pledges receivable consist of the following as of December 31:

	<u>2013</u>	<u>2012</u>
Pledges receivable:		
In one year or less	\$ 5,164,311	\$ 3,810,602
Between one and five years	<u>8,294,745</u>	<u>8,893,194</u>
	13,459,056	12,703,796
Less - discount to net present value	(124,907)	(139,444)
Less - allowance for estimated uncollectible pledges	<u>(1,345,906)</u>	<u>(1,257,705)</u>
	<u>\$ 11,988,243</u>	<u>\$ 11,306,647</u>

Pledges are recorded at the present value of estimated future cash flows. The present value of estimated future cash flows has been measured utilizing a rate commensurate with the risk involved ranging from 0.13% to 1.75% in 2013 and 2012.

Pledges receivable are primarily from foundations, churches and individuals located throughout Massachusetts.

## 6. PROPERTY, BUILDINGS AND EQUIPMENT

Property, buildings and equipment consist of the following at December 31:

	<u>2013</u>	<u>2012</u>
Land	\$ 113,300	\$ 113,300
Buildings and building improvements	6,177,152	6,177,152
Equipment	167,921	163,018
Furniture and fixtures	58,048	58,048
Motor vehicles	<u>110,512</u>	<u>68,370</u>
	6,626,933	6,579,888
Less - accumulated depreciation	<u>(2,340,142)</u>	<u>(2,113,673)</u>
Property, buildings and equipment, net	<u>\$ 4,286,791</u>	<u>\$ 4,466,215</u>

Depreciation and amortization expense for the years ended December 31, 2013 and 2012 was \$226,469 and \$214,387, respectively.

## 7. DUE TO AND FROM AFFILIATED ENTITIES

Certain officers and employees of the Diocese assist in the management and administration of the funds of Trustees of Donations and other related entities. In addition, the Diocese pays certain administrative and other expenses on behalf of several affiliated entities, for which it is to be reimbursed in full. The amounts due from the affiliated entities totaled \$450,397 and \$254,770 at December 31, 2013 and 2012, respectively. In addition, the Diocese pays the Cathedral for building space and for certain administrative services.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 8. CAPITAL LEASE OBLIGATIONS

The Diocese entered into three capital lease agreements for the financing of computer equipment and telephone equipment. Capital lease obligations at December 31, 2013 and 2012 consist of the following:

	<u>2013</u>	<u>2012</u>
Capital lease obligations for telephone equipment with a net book value of \$15,377 at December 31, 2013. Payments are due in monthly installments of \$837 including interest at 10.8% through December 2014.	\$ 11,999	\$ 17,314
Capital lease obligations for computer equipment with a net book value of \$3,568 at December 31, 2013. Payments are due in monthly installments of \$1,087 including interest at 13.6% through May 2014.	3,694	16,739
Capital lease obligations for computer equipment with a net book value of \$3,851 at December 31, 2013. Payments are due in monthly installments of \$1,173 including interest at 13.55% through May 2014.	<u>3,977</u>	<u>18,059</u>
Capital lease obligations	<u>\$ 19,670</u>	<u>\$ 52,112</u>

The value of minimum future lease payments under the capital lease obligations is as follows for the years ending December 31:

2014	\$ 20,595
Less - amount representing interest	<u>925</u>
Present value of minimum lease payments	<u>\$ 19,670</u>

Amortization of capital lease assets is included in depreciation expense.

## 9. PENSION PLAN

Lay employees of the Diocese are provided pension benefits under a defined contribution plan. The Diocese contributes 10% of employee salaries to the plan. The amounts charged to expense for lay pensions in 2013 and 2012 were \$125,224 and \$109,462, respectively.

## 10. FUNDS HELD FOR OTHER BENEFICIARIES AND AFFILIATED ENTITIES

Funds held for other beneficiaries and affiliated entities consist of the following at December 31:

	<u>2013</u>	<u>2012</u>
Funds held for other beneficiaries	\$ 868,413	\$ 824,569
Society for the Relief of Aged or Disabled Clergy	2,976,345	2,706,691
Society for the Relief of Widows, Widowers and Orphans of Clergy	969,408	902,564
Other funds held	<u>544,777</u>	<u>566,214</u>
	<u>\$ 5,358,943</u>	<u>\$ 5,000,038</u>

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 10. FUNDS HELD FOR OTHER BENEFICIARIES AND AFFILIATED ENTITIES...continued

Changes in funds for other beneficiaries and affiliated entities consist of the following for the years ended December 31:

	<u>2013</u>	<u>2012</u>
Balance, beginning of year	\$ 5,000,038	\$ 4,775,719
Contributions and spending policy draws	176,920	117,848
Funds expended	(293,057)	(203,820)
Investment earnings	<u>475,042</u>	<u>310,291</u>
Balance, end of year	<u>\$ 5,358,943</u>	<u>\$ 5,000,038</u>

## 11. PROPERTY HELD IN TRUST FOR OTHERS

The Diocese has a "remainder interest" in all of the assets including cash, investments and real estate of each of the 181 Episcopal parishes and missions within its borders, such that should an Episcopal congregation cease to function, its assets revert to the control of the Diocese. These properties are not occupied or maintained by the Diocese, nor do the programs of the Diocese derive any direct benefit from its "remainder interest". They are, therefore, not reflected in the Diocese's financial statements, unless the Episcopal congregation ceases to function and title has been given to the Diocese.

## 12. INVESTMENT IN PROPERTY AND BUILDINGS AND LEASE AGREEMENT WITH AFFILIATE

In 1989, a major renovation of the Sears and Clark Building and The Cathedral Church of St. Paul (the "Cathedral") was completed. This renovation was made pursuant to an agreement between the Cathedral and the Diocese for the renovation of these buildings for joint occupancy by the Cathedral and the Diocese under a lease from the Cathedral to the Diocese. In 2006, a new lease was signed for the facilities used by the Diocese, which requires the Diocese to make rental payments of \$1 per year plus a prorated share of the operating and maintenance expenses.

The Diocese recorded its cost of this renovation as a part of building improvements in its financial statements. The agreement between the Diocese and the Cathedral provides that should the Sears and Clark Building be sold, the Diocese and the Cathedral would share in the proceeds of the sale in the proportion that each entity's direct contribution bears to the total amount contributed by the two entities. The Diocese's direct contribution to the improvements totaled \$4,085,482 at both December 31, 2013 and 2012 (including the appraised value of the Sears and Clark Building prior to renovation) which is approximately 48% of the total amount contributed of \$8,514,496. Subsequent capital improvements to the buildings by either party will adjust their contribution basis.

During 2013 and 2012, the Diocese made \$451,600 and \$441,600, respectively, in payments in lieu of rent to the Cathedral under a verbal agreement between the two parties. In addition, during 2013 and 2012, the Cathedral made \$103,200 in payments to the Diocese to cover its share of administrative costs. During 2013 and 2012, the Cathedral contributed \$30,000 to the Diocese in support of its mission.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 13. GAIN FROM SALE OF PROPERTY FROM CLOSED PARISHES

During 2013 and in prior years, various churches were closed. In accordance with Canon Law, any property of the closed churches has reverted to the control of the Diocese once title to the property is passed to the Diocese. During 2013 and 2012, the real estate of two churches that had been previously closed were sold by the Diocese, which recognized approximately \$1,200,000 and \$500,000 in net proceeds, respectively.

## 14. NET ASSETS

Temporarily restricted net assets consist of the following at December 31:

	<u>2013</u>	<u>2012</u>
Accumulated appreciation on permanently restricted net assets	\$ 10,078,351	\$ 8,287,402
Endowment funds restricted by donors for various programs	1,594,676	1,404,765
Bishop's discretionary trust funds restricted for various programs	108,118	18,536
Funds for support of programs	416,358	130,349
Together Now Campaign	<u>7,148,768</u>	<u>6,265,375</u>
	<u>\$ 19,346,271</u>	<u>\$ 16,106,427</u>

Temporarily restricted net assets were released from restrictions as follows:

	<u>2013</u>	<u>2012</u>
Capital campaign expenses	\$ 1,429,956	\$ 2,088,749
Strategic ministries	455,593	587,618
Bishop's discretionary funds	77,080	411,581
Development grants	171,724	156,474
Diocesan staffing	92,959	88,091
Facilities	29,737	28,090
Support for retired clergy	21,325	20,306
Clergy programs	54,614	56,524
Miscellaneous	6,639	14,479
Scholarships	1,078	1,078
Sabbaticals	<u>7,431</u>	<u>7,065</u>
	<u>\$ 2,348,136</u>	<u>\$ 3,460,055</u>

Permanently restricted net assets consist of the following at December 31:

	<u>2013</u>	<u>2012</u>
Funds to be held in perpetuity - Endowment Funds	\$ 6,960,849	\$ 6,744,529
Stokes revolving loan fund	4,173,584	4,124,234
Split interest agreements	<u>32,806,822</u>	<u>28,543,601</u>
	<u>\$ 43,941,255</u>	<u>\$ 39,412,364</u>

The Diocesan Council has designated certain unrestricted net assets as a Diocesan Council designated endowment fund. The endowment is invested in the DIT.

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 14. NET ASSETS...continued

### Endowment Net Assets

Endowment net asset composition by type of fund as of December 31, 2013 were as follows:

	Designated by Diocesan Council <u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
Donor restricted endowment funds	\$ -	\$ 11,673,027	\$ 6,960,849	\$ 18,633,876
Diocesan Council designated endowment funds	<u>9,230,909</u>	<u>-</u>	<u>-</u>	<u>9,230,909</u>
Total endowment net assets	<u>\$ 9,230,909</u>	<u>\$ 11,673,027</u>	<u>\$ 6,960,849</u>	<u>\$ 27,864,785</u>

Changes in endowment net assets for the year ended December 31, 2013 were as follows:

	Designated by Diocesan Council <u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
Endowment net assets at beginning of year	\$ 7,974,595	\$ 9,692,167	\$ 6,744,529	\$ 24,411,291
Contributions	245,717	-	-	245,717
Dividend and interest income	178,763	327,147	-	505,910
Realized and unrealized gains, net of investment fees	1,118,603	2,197,379	216,320	3,532,302
Appropriation of endowment net assets for expenditure	<u>(286,769)</u>	<u>(543,666)</u>	<u>-</u>	<u>(830,435)</u>
Endowment net assets at end of year	<u>\$ 9,230,909</u>	<u>\$ 11,673,027</u>	<u>\$ 6,960,849</u>	<u>\$ 27,864,785</u>

Endowment net asset composition by type of fund as of December 31, 2012 were as follows:

	Designated by Diocesan Council <u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
Donor restricted endowment funds	\$ -	\$ 9,692,167	\$ 6,744,529	\$ 16,436,696
Diocesan Council designated endowment funds	<u>7,974,595</u>	<u>-</u>	<u>-</u>	<u>7,974,595</u>
Total endowment net assets	<u>\$ 7,974,595</u>	<u>\$ 9,692,167</u>	<u>\$ 6,744,529</u>	<u>\$ 24,411,291</u>

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements  
Years Ended December 31, 2013 and 2012

## 14. NET ASSETS...continued

### Endowment Net Assets...continued

Changes in endowment net assets for the year ended December 31, 2012 were as follows:

	Designated by Diocesan Council	Temporarily Restricted	Permanently Restricted	Total
	<u>Unrestricted</u>	<u>Restricted</u>	<u>Restricted</u>	<u>Total</u>
Endowment net assets at beginning of year	\$ 4,602,025	\$ 8,610,753	\$ 6,725,649	\$ 19,938,427
Contributions	2,960,077	-	-	2,960,077
Dividend and interest income	146,603	337,129	-	483,732
Realized and unrealized gains, net of investment fees	537,088	1,275,585	18,880	1,831,553
Appropriation of endowment net assets for expenditure	<u>(271,198)</u>	<u>(531,300)</u>	<u>-</u>	<u>(802,498)</u>
Endowment net assets at end of year	<u>\$ 7,974,595</u>	<u>\$ 9,692,167</u>	<u>\$ 6,744,529</u>	<u>\$ 24,411,291</u>

### Unrestricted Net Assets Designated by Diocesan Council

Unrestricted net assets designated by Diocesan Council for specified purposes consist of the following, as of December 31:

	<u>2013</u>	<u>2012</u>
Funds available for Diocesan Council recommendations	\$ -	\$ 1,573,244
Future plans for ministry in Brockton	307,699	421,301
Chelsea project	1,200,000	-
Allston SLAM project	<u>50,000</u>	<u>-</u>
	<u>\$ 1,557,699</u>	<u>\$ 1,994,545</u>

During 2011, the Diocesan Council authorized the creation of two funds designated for specified purposes from the net proceeds that were realized from past church closings. Under the authorization, 50% of the net proceeds were used to establish an endowment fund for congregational vitality at DIT and the other 50% of the net proceeds will be designated for future use in accordance with recommendations from the Diocesan Council. In early 2013, the Diocesan Council approved the appropriation of \$1.2 million to go towards a renovation project at St. Luke's/San Lucas in Chelsea for its feeding and clothing program. Additionally, the fund entrusted to the Diocesan Council and invested at the DIT was expended for this renovation project. At December 31, 2013 and 2012, the endowment fund for congregational vitality was fully funded in the DIT.

During 2013 and 2012, \$146,154 and \$244,376, respectively was authorized and expended from the non-endowment unrestricted funds available for recommendations from the Diocesan Council.



# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

## 15. INTERESTS IN SPLIT-INTEREST AGREEMENTS

### Interests in Charitable Remainder Trusts

The Diocese has been named as a beneficiary of an irrevocable charitable remainder trust and pooled income fund. The fair value of these assets are calculated using present value techniques and are \$574,483 and \$530,788 at December 31, 2013 and 2012, respectively. These values have been reflected as assets in the accompanying statements of financial position as Interests in Charitable Remainder Trusts and Pooled Income Fund. These trusts have underlying assets with aggregate market values of \$603,765 and \$552,328 at December 31, 2013 and 2012, respectively. These assets will be donated to the Diocese upon the death of the income beneficiary in accordance with each individual trust agreement.

The net change in the interests in charitable remainder trusts is reflected in the accompanying statements of activities under the caption "changes in split interest agreements" and totaled \$43,695 and \$53,326 in losses for 2013 and 2012, respectively.

### Beneficial Interest in Perpetual Trusts

The Diocese has a 100% beneficial interest in 54 perpetual trusts and 50% beneficial interest in 1 perpetual trust held by third parties at December 31, 2013 and 2012. The principal as well as annual gains or losses on the trust investments are restricted in perpetuity. The interest and dividend income generated by the trust investments is distributed each year to the Diocese. Distributions received by the Diocese from the trusts were \$1,046,884 and \$989,710 during the years ended December 31, 2013 and 2012, respectively.

## 16. LITIGATION

In accordance with generally accepted accounting principles, certain claims, suits and complaints arising in the ordinary course of business have been filed or are pending against the Diocese. In the opinion of management, all such matters are adequately covered by insurance, or if not so covered, are without merit or are of such kind, or involve such amounts, as would not have a significant effect on the financial position or activities of the Diocese if disposed of unfavorably. Management's estimate of liabilities from these claims may change in the near term depending upon the ultimate outcome of these proceedings.

## 17. FUNCTIONAL CLASSIFICATION OF EXPENSES

Expenses by functional classification for the years ended December 31 are as follows:

	<u>2013</u>	<u>2012</u>
Program	\$ 8,569,792	\$ 8,118,925
Management and general	2,010,115	2,328,884
Fundraising	<u>319,739</u>	<u>196,195</u>
	10,899,646	10,644,004
Capital Campaign	<u>215,520</u>	<u>1,139,331</u>
	<u>\$ 11,115,166</u>	<u>\$ 11,783,335</u>

# The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Years Ended December 31, 2013 and 2012

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## 18. COMMITMENTS

The Diocese contributes to a non-contributory defined benefit plan, the Clergy Plan, administered by the Church Pension Fund (the "Fund"). The Fund was established by the General Convention of the Episcopal Church; the Fund and its affiliates are official agencies of the Episcopal Church for these purposes and operate under the Canons of the Episcopal Church. The Fund was established to administer the clergy pension system of the Episcopal Church, including pensions, insurance, annuities, health and other programs. The plan is a single employer plan, where the Protestant Episcopal Church is the employer.

The Clergy Plan is a defined benefit plan providing retirement, death and disability benefits to eligible clergy of the Episcopal Church. The Diocese contributes to the plan at an assessed rate of 18% of total clergy compensation for clergy employed by the Diocese. Contributions to this plan totaled \$244,377 and \$216,768 for the years ended December 31, 2013 and 2012, respectively.

## 19. SUBSEQUENT EVENTS

The Diocese has evaluated subsequent events through February 13, 2015, the date the financial statements were available to be issued.

**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Anoma Abeyaratne	Elizabeth S. Berman
Thomas E. Adams Jr.	Daniel L. Bernier
Ellen B. Aitken	Alden Besse
Abraham C. Allen	Karen Z. Bettacchi
David Eastman Allen SSJE	Christiaan A. Beukman
David Edward Allen	Michael Billingsley
Joel Almono	Harold G. Birkenhead
Curtis G. Almquist SSJE	Katharine C. Black
Rospignac Ambroise	Rebecca Black
Juliana C. Anderson	Rebecca H. Blair
Shirley M. Andrews	Barry M. Bloom
David M. Angelica	W. E. Douglas Bond
Holly L. Antolini	Anne B. Bonnyman
Robert B. Appleyard Jr.	Steven C. Bonsey
Richard S. Armstrong	Dean W. Borgman
Zenetta M. Armstrong	Jeffrey H. Boyd
Margaret L. Arnold	Stephanie Chase Bradbury
Stephen P. Austill	William J. Bradbury
Russell C. Ayers	Lyn G. Brakeman
Ramon I. Aymerich	James P. Breeden
Stephen T. Ayres	Paul B. Bresnahan
Robert Bacon Jr.	Christian F. Brocato
Robert R.M. Bagwell	R. John Brockmann
Frank D. Baker	Sarah J. Brockmann
John M. Balcom	Henderson L. Brome
Grant W. Barber	Harold R. Bronk Jr.
Richard E. Bardusch	Clifford R. Brown
David M. Barney	R. Mark Brown SSJE
G. Stewart Barns	Thomas J. Brown
Johanna E.L. Barrett	Gwen L. Buehrens
Patricia R. Barrett	Margaret M. Bullitt-Jonas
E. Tom Barrington Jr.	Anthony F. Buquor
Charles D.H. Barton	Richard Burden
Jane Bostick Bearden	Alden R. Burhoe
Robert J. Bela	Richard E. Burke
Cynthia Bell	Whitney H. Burr
Robert A. Bennett	Matthew Cadwell
Bruce L. Benschhoff	Joyce C. Caggiano
Carl E. Bergstrom	Lynn Campbell

**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Judith P. Carpenter	Timothy E. Crellin
Julie A. Carson	Kate Cress
Frank S. Caruso	Margot Critchfield
Roy F. "Bud" Cederholm Jr.	Daniel F. Crowley
R. Arrington Chambliss	Joao A.A. d'Alcaravela
Susan Esco Chandler	Alexander S. Daley
Constance Chandler-Ward	Jennifer Grumhaus Daly
George M. Chapman	Rainey Dankel
Tansy Chapman	Charles Laskin David
Peter G. Chase	E. Gale Davis
Randall Chase Jr.	Judith A. Davis
Alison Cheek	Robert C. Day
Michael R. Cheney	John de Beer
Kendrick H. Child	Patricia J. de Beer
Sharon L. Ciccarelli	Chitral S. de Mel
Scott A. Ciosek	Marya L. DeCarlen
Bradford Clark	Laurel P. Deery
Jacqueline Clark	Lily A. DeYoung
Judith F. Clark	E. Robert Dickson Jr.
Richard T. Clark	Edith W. Dolnikowski
John R. Clarke	Mary Jane Donohue
Thomas G. Cleveland	Richard H. Downes
Ann S. Coburn	Donald M. Dunbar
Suzanne F. Colburn	Julia Dunbar
Theodore Cole Jr.	Marc G. Eames
Karen Coleman	Richard F. Ebens
Jeremi A. Colvin	Malcolm D. Eckel
Louise R. Conant	William W. Eddy
John H. Conn	Jonathan T. Eden
Walter J. Connelly Jr.	Mark D.W. Edington
Sarah Amy Conner	Robert D. Edmunds
Joseph M. Constant Jr.	Robert B. Edson
Michael Corrigan	Katherine B. Ekrem
Gay P. Cox	C. Clyde Elledge II
Roger Weldon Cramer	Kathryn N. Elledge
John D. Crandall	Anne Emry
Rebecca M. Crane	jimichael Engels
Marcus T. Crapsey II	Gareth C. Evans
Malia Crawford	Katharine C. Evans

**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Noah H. Evans	Patricia D. Gober
Norman J. Faramelli	Wallace G. Gober
Manuel P. Faria III	Michael J. Godderz
John A. Fesq	Andrew Goldhor
Heidi A. Fieldston	Mary M. Gonzalez
Christopher J. Fike	Elizabeth Good
John H. Finley IV	Billie Mae Gordon
Paige F. Fisher	Martin J. Goshgarian
Sue Fisher Seeger	Jane S. Gould
Jessica Flaherty	Eleanore L. Gowen
Alden B. Flanders	Colin B. Gracey
Francis Fornaro	Patrick T. Gray
E. Louise Forrest	Gretchen Grimshaw
Lisa R. Fortuna	Elizabeth Anne Grundy
Virgilio Fortuna BSG	Margaret B. Gunness
Dwight C. Fortune	Edgar Gutierrez-Duarte
Pamela L. Foster	Douglas Hale
Anne C. Fowler	Addison C. Hall
L. Nelson Foxx	Lisbeth J. Hall
Ann H. Franklin	Lyle G. Hall
Julian K. Freddie Jr.	W. Michael Hamilton
David A. Fredrickson	Robert L. Hammett
Warren G. Freeman	Patricia Handloss
William H. Freeman	Kim E. Hardy
Stephen A. Fregeau	Stanley P. Hardy
Christen S. Frothingham	Catherine A. Harper
Harold W. Garbarino	Barbara C. Harris
Anne E. Gardner	Gayle Elizabeth Harris
G. Kenneth Garrett	Merritt R. Harrison
Judith S. Gay	Holly Hartman
Susan L. Geissler-O'Neil	Michael Hartwell
Miriam C. Gelfer	Cornelius Hastie
Maggie Geller	Bret B. Hays
Cathy H. George	Charles C. Hefling
Rebecca B. Gettel	Scott H. Helferty
Elizabeth Gibson	Robert E. Hensley
Martha H. Giltinan	Alan R. Hesse
James K. Githitu	William B. Heuss
Charles L. Glenn	Carter Heyward

**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Eric M. Hillegas  
Edward H.C. Ho  
Michael J. Hodges  
Marsha H. Hoecker  
Therese Hofmann  
David L. Holt  
John Leon Hooker  
Daniel E. Horgan  
Sharon Hornberger-Brown  
James H. Hornsby  
Alanson B. Houghton II  
Marguerite A. Howell  
Cynthia P. Hubbard  
Martha L. Hubbard  
Jennifer S. Hughes  
E. Bradlee Hultman  
Donald A. Hunt  
Marshall W. Hunt  
Victoria Wells Hunt  
Carl P. Ijams  
Sara H. Irwin  
Donald T. Isaac  
Joel M. Ives  
Robert S. Jackson  
Philip C. Jacobs III  
Donald W. Jaikes  
F. Washington Jarvis  
Peter L. Jeffrey  
Philip E. Jerauld  
Edwin D. Johnson  
Joan Cotrell Johnson  
Kenneth W. Johnson  
David K. Johnston  
Kenneth L. Jones  
Rosanna Case Kazanjian  
Victor H. Kazanjian  
Diane Dorothea Keith-Lucas  
Sarah D. Kelb  
Brian S. Kelley

Maureen Dallison Kemeza  
Thomas B. Kennedy  
Margery Kennelly  
Edward C. Kienzle  
David A. Killian  
Allan B. King Jr.  
Benjamin J. King  
Elise Kinney  
Hall Kirkham  
James C. Knudson  
T. James Kodera  
William M. Kondrath  
Beulah C. Koulouris  
Armand Kreft  
Matthew C. Kruger  
Judith S. Krumme  
Philip J. Kuhn  
Philip N. LaBelle  
James R. LaMacchia  
Robert D. Landreth  
Gerard M. Lawrence  
Susan Lederhouse  
Susan H. Lee  
Kenrick Lewis  
Adam S. Linton  
Dorothella Littlepage  
Mally Ewing Lloyd  
Samuel T. Lloyd III  
Bruce A. Lomas  
Kathleen G. Lonergan  
Richard T. Loring  
Raymond A. Low  
Denzil J. Luckritz  
Daniel K. MacDonald  
Robert A. Mackie  
Katherine M. Malin  
Alice B. Mann  
Louise Mann  
Michael J. Marrone

**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Elizabeth Marsh	James L. Nelson
Robert K. Massie	Roger E. Nelson
Ranjit K. Mathews	Jay L. Newberry
Beth H. Maynard	Connie Miu Sheung Ng-Lam
Kathleen A. McAdams	Bruce E. Nickerson
James P. McAlpine	Daphne Bess Noyes
Terry A. McCall	Jean Baptiste Ntagengwa
Amy McCreath	Audrey L. O'Brien
A. Homer McCue	Kevin O. Olds
Eugene C. McDowell	Robert E. Outman-Conant
Robert B. McFarlane	W. Russell Page Jr.
Jacqueline McGrady	Eleanor J. Panasevich
Brian W. McGurk	Pui-kong Thomas Pang
Mark C. McKone-Sweet	Terry R. Pannell
Devin McLachlan	Cynthia D. Pape
John N. McLaughlin	Scott I. Paradise
Michael P. Melendez	Barbara D. Parini
Jeffrey W. Mello	Donald H. Parker
William G. Messenger	Roy E. Parker OHC
Wendel W. Meyer	Charles F. Parthum III
David R. Milam	Cameron E. Partridge
Nancy Elizabeth Milholland	Richard L. Payne
Donald P. Miller	Edwin C. Pease
Todd L. Miller	Eldridge Pendleton SSJE
Donald A. Milligan	Catherine Louise Perkins SSM
Lorraine M. Mills-Curran	Barbara Ann Peterson
Cheryl V. Minor	Deborah A. Phillips
Paul L. Minor	Kathryn Ann Piccard
Anne M. Minton	Joseph T. Pinho
Karen Brown Montagno	Geoffrey T. Piper
Eduardo Monzon	Louis W. Pitt Jr.
Christopher R. Morck	Wanda Pizzonia
Nicholas M. Morris-Kliment	John Michael Povey
Jerry D. Morrow	Rita Powell
Frederick P. Moser	Sharon K. Powers
Roger C. Moulton	Victoria A. Pretti
Thomas N. Mousin	Phyllis A. Price
Thomas P. Mulvey Jr.	Warren R. Radtke
Brian J.P. Murdoch	S. Lester Ralph

**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Ronald E. Ramsey	Michael O. Shirley
Sarah A. Randall SSM	David J. Siegenthaler
Cristina Rathbone	Richard S. Signore
Brian Rebholtz	Richard J. Simeone
Nathaniel T. Reece	John E. Simson
Jennifer B. Reiley	Herbert C. Skelly
Maria Regina Retamal	Claude A. Smith
William W. Rich	Gail S. Smith
Susan O. Richmond	Geoffrey T. Smith
Linda H. Ricketts	H. Mark Smith
Kathleen Pakos Rimer	John F. Smith
Adrian Robbins-Cole	Nancy S. Smith
Joseph O. Robinson	Stephen V. Smith
Paul B. Rodgers	Barbara P. Smith-Moran
Edward W. Rodman	Susanna J. Snyder
Samuel S. Rodman	Tara K. Soughers
Michael J. Roeske	Adrian Stair
Laurie Ann Rofinot	Elizabeth Steinhauser
Timothy James Rogers	Leslie K. Sterling
Suzan J. Rolfe-Boutwell	George R. Stevens
Ema Rosero-Nordalm	Matthew W. Stewart
Carlton T. Russell	Natasha F. Stewart
Susan H. Russell	Andrew J. Stoessel
Adele Marie Ryan SSM	Barbara E. Stowe
Noble Scheepers	Jon C. Strand
Timothy E. Schenck	John P. Streit Jr.
Joyce L. Scherer-Hoock	Judith L. Stuart
Joyce M. Scheyer	David P. Sullivan
Kenneth Schmidt	Maryalice Sullivan
William J. Schneider	Meghan T. Sweeney
Susan M.B. Schwab	Mark A. Templeman
Margaret K. Schwarzer	Evan L. Thayer
Paul M. Schwenzfeier	John H. Thomas
Vincent Seadale	Owen C. Thomas
Albert N. Sears III	Ronald Creighton Tibbetts
M. Thomas Shaw SSJE	Robert W. Tobin
Nancy H. Shepherd	Paula J. Toland
Thomas C. Shepherd	Michele A. Torres
Robert L. Sherwood	John T. Townsend



**Clergy Canonically Resident and Eligible For Seat  
and Vote at April 2014 Diocesan Election  
Convention**

Stephen C. Trever	Colette Bachand Wood
Roy Tripp	Priscilla Wood
Geoffrey R. Tristram SSJE	Sammy L. Wood
David B. Van Dusen	J.C. Woods Jr.
Dale L. Van Meter	James Christopher Woods
Stephen O. Voysey	Deborah M. Woodward
David B. Vryhof SSJE	Roger W. Wootton
Karin E. Wade	Bruce A. Young
Suzanne B. Wade	Herbert B. Zalneraitis
Mary Scott Wagner	Luther Zeigler
Elsa Ph. Walberg	Patricia Zifcak
Janice Walden	
Regina Laba Walton	
Sze-kar Wan	
Patrick C. Ward	
Deborah M. Warner	
Allan B. Warren III	
Russell Way	
James M. Weiss	
G. Truman Welch	
George H. Welles Jr.	
Christopher Wendell	
Peter W. Wenner	
Pamela L. Wertz	
George A. Westerberg	
Elizabeth Wheatley-Dyson	
James S. Whitaker	
Bailey O. Whitbeck	
K. Gordon White	
Elizabeth Whitmore	
Christine R. Whittaker	
Joseph W. Wilkes	
Monrelle T. Williams	
Sandra Williams	
Barbara S. Williamson	
Donald R. Wilson	
Robert G. Windsor	
Diane Wong	
Gloria L. Wong	

**ORDER OF BUSINESS for the  
ELECTION of a BISHOP DIOCESAN  
April 5, 2014**

- 7:30 – 9:30 a.m. REGISTRATION in Sproat Hall
- 9:00 PROCESSION
- HOLY EUCHARIST
- Announcements and Welcome from the Dean
- 9:45 CALL TO ORDER  
Declaration of Constitutional Quorum  
Report of the Qualifications Committee  
Invitation to Honorary/Special Seats
- Acceptance of the Special Rules of Order &  
Order of Business
- Presentation from the Standing Committee  
Explanation of Discernment & Petition Processes  
Presentation of the Candidates and Nomination Documentation
- Election Overview  
Explanation of Balloting Procedures
- 10:30 FIRST BALLOT
- First Ballot Results
- Subsequent Ballots as needed
- 12:30 RECESS for Lunch (1 hour)
- 1:30 RECALL to Order
- Subsequent Ballots as needed
- Signing of the Testimonials
- ADJOURNMENT\*

\*Balloting will end at 7 p.m., unless, at the discretion of the presiding officer, an election seems imminent. Saturday, April 12 has been set aside for reconvening, at 8:30 a.m., should the electing convention not complete its business on April 5.

**MINUTES for the SPECIAL SESSION of CONVENTION  
to ELECT a BISHOP DIOCESAN  
SATURDAY, APRIL 5, 2014  
CATHEDRAL CHURCH of SAINT PAUL, BOSTON**

CONVENTION EUCHARIST

The Convention Eucharist was held at 9:00am with Bishop M. Thomas Shaw, SSJE, as the presider.

Bishop Shaw called the Convention to order at 10:15am. He then recognized and thanked all members of the Standing Committee, Discernment Committee and Transition Committee for their hard work throughout this process.

DECLARATION OF CONSTITUTIONAL QUORUM PRESENT

The Chair, Bishop Shaw, recognized the Secretary, Mr. Leon Brathwaite, who declared a constitutional quorum present in both the lay and clerical orders.

REPORT OF THE COMMITTEE ON QUALIFICATIONS

The Chair recognized Ms. Suzette Phillips from the Qualifications Committee. She reported that there were no contested seats and that all lay delegates were properly certified.

INVITATION TO SPECIAL SEATS

The Chair recognized Mr. Brathwaite, who moved the Invitation to Special Seats as follows:

*It was moved, seconded and unanimously VOTED that the following be entitled to seat and voice, without vote, in the Convention: officers of the Corporation; lay members of the Standing Committee; lay members of the Discernment Committee; lay members of the Transition Committee.*

INTRODUCTIONS

The Chair recognized Bishop Gayle Harris who introduced the Rev. Laura Everett, Executive Director of the Massachusetts Council of Churches, and her guests.

Bishop Shaw then introduced retired bishops Bud Cederholm and Barbara Harris.

ACCEPTANCE OF SPECIAL RULES OF ORDER AND AGENDA FOR THE DAY

The Chair recognized Standing Committee President, James Wagner, Esq.

*It was moved, seconded and unanimously VOTED to approve the Special Rules of Order for the Special Convention to elect a Bishop Diocesan with the following change to Rule III:  
Persons will be placed in nomination at the Convention by the Standing Committee from both the discernment process or the petition process as defined by the Standing Committee. (Words underlined have been changed from the previous version).*

*It was then moved, seconded and unanimously VOTED to approve the Order of Business for April 5, 2014.*

PRESENTATION FROM THE STANDING COMMITTEE

Mr. Wagner gave the presentation and explanation of the Discernment and Petition Processes.

## PRESENTATION OF NOMINEES AND NOMINATION DOCUMENTATION

Mr. Wagner presented the following nominees while their picture was projected on the screen:

The Rev. Holly Lyman Antolini  
 The Rev. Timothy E. Crellin  
 The Rev. Ronald D. Culmer  
 The Rev. Alan M. Gates  
 The Rev. Ledlie I. Laughlin  
 The Rev. Canon Margaret “Mally” Ewing Llyod  
 The Rev. Samuel S. Rodman III

He then gave the official nomination documentation to the Chair.

## ELECTION OVERVIEW/EXPLANATION OF BALLOTING PROCEDURES

The Chair recognized Mr. Harry Walton, Chair of the Elections Committee, who explained balloting procedures. Mr. Walton then directed attention to the screen for a brief video tutorial. Following the tutorial, Mr. Walton made his concluding remarks, including instructions that after an election has occurred, all clergy and lay delegates must sign the testimonials before they leave as is required by the national canons.

After all ballots were in order, the Chair said a few words about maintaining a respectful environment for the day.

## FIRST BALLOT

The Chair requested that the tellers take their places and that ballot #1 be cast. The tellers collected the ballots and removed them from the floor for counting. After a time of caucusing and hymn singing, the results were announced.

## FIRST BALLOT RESULTS

The following are the results of the first ballot:

<u>Ballot Number 1</u>	<u>Clergy</u>	<u>Lay</u>
Antolini	23	12
Crellin	31	62
Culmer	23	41
Gates	84	109
Laughlin	44	62
Lloyd	17	24
Rodman	75	63
Valid Ballots Cast This Round	297	373
Needed to Elect	<b>150</b>	<b>188</b>

## SECOND BALLOT

There being no election on the first ballot, the Chair requested that the tellers take their places and that ballot #2 be cast. The tellers collected the ballots and removed them from the floor for counting. After a time of caucusing and hymn singing, the results were announced.

SECOND BALLOT RESULTS

The following are the results of the second ballot:

<u>Ballot Number 2</u>	<u>Clergy</u>	<u>Lay</u>
Antolini	5	9
Crellin	26	48
Culmer	11	8
Gates	120	154
Laughlin	30	41
Lloyd	6	4
Rodman	90	72
Valid Ballots Cast This Round	288	336
Needed to Elect	<b>145</b>	<b>169</b>

Following the results of the second ballot, the Rev. Ronald Culmer, the Rev. Mally Lloyd, the Rev. Tim Crellin and the Rev. Holly Antolini withdrew from the election. Bishop Shaw thanked each candidate and they received a standing ovation. The remaining candidates were the Rev. Sam Rodman, the Rev. Ledlie Laughlin and the Rev. Alan Gates.

THIRD BALLOT

Following the announcement of withdrawals, the Chair requested that the tellers take their places and that ballot #3 be cast. The tellers collected the ballots and removed them from the floor for counting. The convention was recessed for lunch at 1:05pm while the results were being tallied. The convention was recalled to order at 2:00pm.

After a period of discussion between the Bishops, candidates, Standing Committee and Officers of the Diocese, Parliamentarian, Byron Rushing, explained the following:

Members of the convention noticed a discrepancy in the total number of votes recorded in the first lay ballot from the total number of credentialed lay delegates reported at the beginning of the convention. After further investigation, it was discovered that the source of the error was in the mathematical tally of the lay vote in the first ballot. Byron Rushing read the discrepancies aloud and the correct tally results for the first ballot was displayed as following:

<u>Ballot #1 CORRECTED</u>	<u>Clergy</u>	<u>Lay</u>
Anotlini	23	12
Crellin	31	57
Culmer	23	35
Gates	84	100
Laughlin	44	53
Lloyd	17	23
Rodman	75	54
Total Valid Ballots Cast	297	334
Needed to Elect	<b>150</b>	<b>168</b>

Byron Rushing then recommended that the second and third ballots be declared invalid and that the only correct ballot be the corrected first ballot. Because of this, none of the withdrawals are considered valid and all seven candidates will be on the next ballot.

*It was moved, seconded and unanimously VOTED that the convention approve the recommendation of the Parliamentarian.*

#### FOURTH BALLOT

Following the motion, the Chair requested that the tellers take their places and that ballot #4 be cast with all original seven candidates eligible to receive votes. The tellers collected the ballots and removed them from the floor for counting. After a time of caucusing and hymn singing, the results were announced as follows:

#### FOURTH BALLOT RESULTS

<u>Ballot Number 4</u>	<u>Clergy</u>	<u>Lay</u>
Holly Antolini	6	4
Tim Crellin	19	28
Ronald Culmer	5	0
<b>Alan Gates</b>	<b>157</b>	<b>188</b>
Ledlie Laughlin	16	34
Mally Lloyd	4	2
Sam Rodman	80	69
Total Valid Ballots Cast	287	325
Needed to Elect	<b>145</b>	<b>164</b>

#### ELECTION

At the conclusion of the fourth ballot, Bishop Shaw declared that an election had been achieved in that the Reverend Alan Gates had received a majority of votes in both orders. Bishop Shaw thanked the other candidates for putting themselves forward. The Testimonials of Election were then prepared.

#### ADJOURNMENT

After the election has been announced and verified, the Chair said a blessing and adjourned the convention at 3:45pm.

#### SIGNING OF THE TESTIMONIALS

After the adjournment, the Chair announced that in order to certify the election in accordance with the canons, all clerical members and lay delegates of Convention must sign the Testimonials of Election. The Chair asked the marshals to be in place to make the testimonial forms available for signing.

Respectfully submitted by,

Laura Simons  
*Assistant Secretary of the Diocese*

**EPISCOPAL DIOCESE OF MASSACHUSETTS****Special Convention for the Election of a Bishop Diocesan**

In accordance with the Rules of Order of the Convention, Rule XVI, the Standing Committee proposes these

**SPECIAL RULES OF ORDER****RULE I - DELEGATES**

A. No person shall be admitted to the Convention floor after balloting begins without an authorized, identifying badge.

B. Badges shall identify persons as:  
blue - clerical members of Convention  
salmon - lay delegates of Convention  
pink - persons with special floor access  
green – tellers  
red – marshals  
yellow – media  
white – guests (Balcony or Sproat Hall only)

C. Clerical members and lay delegates of Convention will be issued a ballot book and identification badge upon registration. In the event of the loss of an identification badge and/or ballot book, application for re-issue may be made to the Qualifications Committee Chair or his/her designee. There will be no absentee ballots, no substitute, or transferable ballots (other than properly certified alternates for lay delegates).

**RULE II - RESOLUTIONS**

Only resolutions pertaining to the election of a Bishop Diocesan shall be considered at the Special Convention for the Election of a Bishop Diocesan. These Special Rules of Order may be amended with the consent of two-thirds of the members present.

**RULE III - NOMINATIONS**

Persons may be placed in nomination at the Convention by the Standing Committee from either the discernment process or the petition process as defined by the Standing Committee.

**RULE IV - INTERVALS BETWEEN BALLOTING**

After each result is announced and prior to each subsequent ballot, prayers and hymns shall be offered. There will be an opportunity for recess not to exceed twenty (20) minutes after each ballot.

**RULE V-WITHDRAWAL OF NOMINEES**

The name of a nominee may be withdrawn from further consideration by the Convention by delivery to the Secretary of Convention of a written statement by the nominee or by a voting member of Convention designated by the nominee in writing to the Secretary.

**RULE VI - CERTIFICATION OF THE ELECTION**

No member of Convention shall be excused until the Convention is either recessed or until the election is announced and the SIGNATURE of each voting member is obtained for the Testimonial of the Election. Delegates must sign by orders (clergy and lay) before leaving.

**RULE VII - APPOINTMENTS**

The Chair shall appoint marshals, aides and other personnel to assure compliance with the Rules of the Convention and to assist and complete the process of formally notifying the Bishop Diocesan-elect.

**RULE VIII - RECESS OF CONVENTION**

No balloting shall commence after 7:00 p.m. on Saturday, April 5, 2014, unless, at the discretion of the Chair, an election seems imminent. If no Bishop Diocesan shall have been elected upon completion of the last ballot commenced prior to that time, the Convention shall recess and shall reconvene at 8:30 a.m. on Saturday, April 12, 2014, at which time balloting shall be resumed after celebration of the Eucharist.



## **DIOCESAN COUNCIL REPORT TO CONVENTION SEPTEMBER 2013 - JUNE 2014**

The Diocesan Council met eight times during the 2013-2014 program year. On a regular basis Council received reports from the bishops and updates from committees and task forces. The following summarizes particular issues Council considered or discussed at each meeting. All meetings were held at the Cathedral Church of St. Paul in Boston, unless otherwise noted.

### September 14, 2013, at the SLAM Property, Allston, MA

- Heard an overview from chief business officer and assistant treasurer Rick Strout on the proposed 2014 diocesan budget and voted to approve recommendation of the proposed budget to Diocesan Convention.
- Voted to join with the Jorge Fuentes Antiviolence Task Force and Bishop Shaw in supporting and joining the efforts of the Massachusetts Coalition to End Gun Violence.
- Heard a report from the Assessment Coordinating Committee and voted to approve adjustments for All Saints' Church, Attleboro; St. Elizabeth's Church, Wilmington; Trinity Church, Woburn; and St. Mark's Church, Foxborough.
- Heard a progress report from Diocesan Council member John Iredale on the building project at St. Luke's/San Lucas Church in Chelsea.
- Heard a report from the Rev. Canon Mally Lloyd, Canon to the Ordinary, about the upcoming Diocesan Convention.
- Heard a presentation from the Rev. Cameron Partridge, Episcopal Chaplain at Boston University, and other project representatives on a proposal to rehabilitate the property of the closed Church of St. Luke and St. Margaret in Allston for multipurpose use, and voted to approve expenditure of up to \$50,000 from the Proceeds from Sales of Closed Parishes Fund, for the purposes of hiring architectural and engineering services and, as needed, for clarifying legal and operating relationships.
- Heard an update from Standing Committee member James Wagner on the bishop coadjutor election process.

### October 17, 2013

- Heard a report from Jack Roll on behalf of the American Friends of the Episcopal Diocese of Jerusalem about the Mission Tithe Grant received for vocational training and healthcare ministry.
- Heard a report from the Rev. Stephen Voysey, Chair of the Budget Committee, on the budget for the bishop search, election and transition process, and voted: to approve a total budget of \$290,500, with the contingency that no budget item may be expended for another purpose without approval of the Budget Committee; to approve related costs in the budget for the celebration of the retiring bishop of up to \$18,000, and nine months of salary and other expenses of up to \$150,000; and to approve the Budget Committee's pursuit of funding from: a potential anonymous donor willing to match voluntary contributions from congregations, organizations and agencies; \$50,000 in the proposed 2014 budget assigned to the new bishop transition reserve; and the unrestricted endowment.
- Heard a report from staff members of the Office of Development that included plans and proposals for the Annual Fund.
- Heard a report from Esther Powell, Grants and Events Administrator, on Creation Care Initiative grants and a new loan program still under development.
- Voted to approve the Merrimack Valley and Plymouth, Cape and the Islands as two new mission hub sites.
- Voted to accept the recommendation that Foundation Cristosal receive this year's Mission Tithe Council Grant in the amount of \$25,000.
- Heard an update that Grace Church in North Attleboro has had its Diocesan Convention vote restored.
- Heard an update on the St. Luke's/San Lucas, Chelsea construction project.

### December 5, 2013

- Heard a presentation from Christ Church/Iglesia San Juan, Hyde Park.

- Heard a report from treasurer, Jim Gammill, and voted to approve and accept the Investment Policy Statement as prepared by the Financial Advisory Committee.
- Voted that the treasurer identify readily available funds for the ongoing bishop search and transition activities, and that the treasurer be authorized to withdraw from the unrestricted diocesan endowment any additional funds (not to exceed \$375,000) required to fund the search and transition budget.
- Voted to authorize signers on diocesan Eastern Bank and Fidelity cash reserves accounts.
- Voted to approve clergy housing allowances.
- Voted a resolution expressing gratitude to former chief business officer Richard Strout.
- Voted its intention that the funds from the sale of the former St. Paul's Church, Brockton continue to be held in reserve outside of the process for use of proceeds from the sale of closed churches, and the intention that the funds may be used to support the developing ministry of Grace Chapel in Brockton, with stipulations for requesting and granting the funds.
- Heard a report from the chair of the Transition Committee, the Rev. Julian Freddie.
- Heard a report from the Rev. Sam Rodman on budgets for the Plymouth, Cape and Islands Mission Hub and the Merrimack Valley Mission Hub, and voted to authorize up to \$25,000 for start-up costs for Merrimack Valley.
- Heard a presentation and update on redevelopment plans for the property of the former Church of St. Luke and St. Margaret in Allston.
- Voted to reappoint the Rev. Jane Bearden, Lisa Garcia and the Rev. Stephen Voysey to the Budget Committee.
- Voted to reappoint the Rev. George Stevens and Jane White to the Financial Advisory Committee.
- Voted to approve a 2 percent raise for the diocesan staff.

January 25, 2014, at the Barbara C. Harris Camp and Conference Center, Greenfield, NH

- Heard a report from treasurer, Jim Gammill, including implementation steps on the recently voted Investment Policy Statement.
- Voted to re-elect the Rev. Chris Wendell and Chris Trahan to the Executive Committee.
- Voted to approve the budget for the Plymouth, Cape and Islands Mission Hub.
- Heard an update on the project plans for the property of the former Church of St. Luke and St. Margaret in Allston.

February 27, 2014

- Heard a presentation from members of the Trustees of Donations regarding concerns about the Investment Policy Statement approved by Diocesan Council on Dec. 5, 2013.
- Heard a report from the chair of the Compensation and Benefits Committee, Jeff Tyrakowski, and voted to elect the Rev. Andy Stoessel to the Compensation and Benefits Committee.
- Heard a report from treasurer, Jim Gammill, regarding the 2015 assessment formula and 2013 year-end financials.
- Voted to approve the Merrimack Valley Hub budget for the 2014-2015 program year.
- Voted to encourage the Executive Committee to make time on the Council agenda for monthly deanery representative reports.
- Voted to approve a new process for allocating proceeds from the sale of closed churches that allows for proposals which will be considered by the Executive Committee and given final approval by the full Diocesan Council.
- Voted to authorize the Treasurer to make payment to the Town of Lexington up to \$40,000 for the purpose of satisfying any and all outstanding claims and liens that the Town has on the property, and add the amount paid to the outstanding principal balance of the Note.
- Heard an Executive Committee report which included a vote to approve housing allowances for the Rev. Dorothea Littlepage and the Rev. Moses Sowale.

March 27, 2014

- Heard a presentation from Dean Jep Streit on renovation plans for the Cathedral Church of St. Paul.
- Heard a report from the Diocesan Loan Committee and voted to approve the 2014 Diocesan Loan/Green Loan Application.
- Heard a report from the chair of the Audit Committee, John Woodward, and voted to accept the audit of 2012 financial statements dated Feb. 20, 2014.
- Heard a report from the vice chair of the Transition Committee, Angela McConney Scheepers.
- Heard a report from the treasurer, Jim Gammill, and voted the 2015 parish assessment formula: assessment due = 15.5 percent \* BASE - \$6,000 (subject to a floor of 0) where the BASE for 2015 is equal to line 14 ("all other operating expenses") from the 2012 parochial report, less line 7 ("assistance from diocese"). For a mission, the 2015 assessment is two-thirds the amount that would be assessed if the congregation were a parish.
- Voted to authorize the diocesan treasurer, diocesan assistant treasurer, canon to the ordinary and vicar for St. Stephen's Church in Boston, acting singly, to execute on behalf of the diocese any and all documents related to the construction of a small addition to the rear of the parish hall, relocate and expand the kitchen and enlarge the parish hall, subject to periodic reporting to the satisfaction of the diocesan treasurer.

May 15, 2014 at Church of the Advent, Boston, MA

- Heard an update about the plans for the consecration of the bishop-elect, the Rev. Alan M. Gates, and a transition budget report.
- Heard an update about the construction project at St. Luke's/San Lucas Church in Chelsea.
- Heard a report from Laura Walta, the project director for global mission, and the Rev. Holly Hartman, deacon for global partnerships, on the proposed Global Mission Network.
- Heard a report from the treasurer, Jim Gammill, and voted to authorize the Assessment Coordinating Committee to receive and consider requests from congregations for adjustments to the 2015 scheduled assessments (not to exceed a total of \$50,000).
- The Assessment Coordinating Committee will present its recommendations to Council for final action.
- Voted to endorse and accept the "Charter of Collaboration and Partnership Between the Trustees of Donations and the Diocesan Council," dated May 2014.
- Heard an update about the Use of Proceeds Fund application process.
- Heard a report from Alewife Deanery representatives Ted Ts'o and the Rev. Joe Robinson.

June 19, 2014, Emmanuel Church, Boston, MA

- Voted to approve the proposal from the Jubilee Committee, dated June 5.
- Heard a report from the Rev. Sam Rodman about 2014 mission hub applications and voted to approve Metrowest and North Shore sites as new mission hubs.
- Heard a report from the treasurer, Jim Gammill, and voted to approve a grant agreement with Episcopal City Mission for the purpose of funding mission redevelopment at the property of the former Church of St. Luke and St. Margaret in Allston.
- Voted to approve the sale of the property of the former St. David's Mission in Pepperell.
- Heard an update on the 2015 budget process to date.
- Heard an update about the Use of Proceeds Fund applications which were reviewed by the Executive Committee on June 12, and decided to postpone all application decisions until September. All materials and information can be found here: [www.diomass.org/funding-church-property-sale-proceeds](http://www.diomass.org/funding-church-property-sale-proceeds).
- Heard a Boston Harbor Deanery report from the Rev. Tom Mousin.
- Heard an update about the St. Luke's/San Lucas, Chelsea construction project.
- Heard an update about plans for the Sept. 13 consecration of the new bishop.

Submitted by: Laura Simons, Assistant Secretary

**STANDING COMMITTEE REPORT TO CONVENTION  
SEPTEMBER 2013 – AUGUST 2014**

The Standing Committee's work includes matters pertaining to real estate, Stokes Loans, parish by-laws and/or constitution revisions, and the ordination process. The Standing Committee has also been responsible for organizing and overseeing the process for election of a bishop diocesan. The following is a summary of the votes taken by the Standing Committee over the past year.

*On September 12, 2013:*

- VOTED to accept the budgets as proposed by the Discernment and Transition Committees.
- VOTED to hire the Very Rev. Ron Clingenpeel as consultant to the Bishop's election process to replace Ms. Suzanne Foucault who has had unforeseen and serious health related issues.
- VOTED to consent the Election of a Bishop Coadjutor for the Episcopal Diocese of Mississippi.
- VOTED to consent to the Election of Whyne M. Hougland, Jr. as Bishop Diocesan of the Diocese of Western Michigan.

*On October 10, 2013:*

- VOTED to recommend Andrew Goldhor, Sarah Kelb, Paula Toland and Stephen Trever for ordination to the priesthood.
- VOTED that the Standing Committee provide its advice and consent, pursuant to Diocesan policy, for the Church of the Holy Spirit, Mattapan, to purchase the residential property located at 23 Clearwater Drive, Boston, for clergy housing.
- VOTED that the treasurers for each committee, Rick Strout, someone from SC (Mark McKone-Sweet) and someone from the Budget Committee should meet once a month to make sure the election and transition budgets are on track.
- VOTED by orders with 2/3 vote in each, that the Standing Committee gives its consent to the remittance and termination of the suspension of the Rev. Robert Bacon, Jr. thereby restoring his right to exercise the gifts and spiritual authority as a priest in this church.

*On November 14, 2013:*

- VOTED to elect James Wagner as the President, Mark McKone-Sweet as Vice President, and Marya DeCarlen and Blanca Silvestrini as Co-Secretaries of the Standing Committee for 2013-2014.
- VOTED as provided under Canon 14, section 4(1) of the Protestant Episcopal Diocese of Massachusetts ("Diocese"), the Standing Committee acting at the request of Christ Church, Somerville, Mass, a Massachusetts corporation, provides its advice and consent to the Bishop for the closing of the Mission, liquidation and transfer of its remaining assets to the "Diocese", and its dissolution.
- VOTED to approve a Stokes Fund Loan in the amount of \$15,000 at 3.75% interest for 3 years and to provide its advice and consent, pursuant to Diocesan Canon 18, for the encumbrance of the property at 164 Newtown Road, Acton, with a customary lien for such loans.
- VOTED to approve the recommendation that the revised by-laws of St. Peter's Church, Cambridge be approved as submitted.
- VOTED to approve the recommendation that the revised by-laws of Church of Our Saviour, Arlington be approved as submitted.
- VOTED to approve the recommendation that the revised by-laws of St. Luke's Church, Scituate be approved as submitted.
- VOTED to accept the resignation date of September 13, 2014 for Diocesan Bishop M. Thomas Shaw, SSJE, and to convert, therefore, the April 5, 2014 election of a new bishop from an election for a bishop coadjutor to an election for a bishop diocesan.
- VOTED that the Standing Committee of the Episcopal Diocese of Massachusetts gives its advice and consent to the Bishop, pursuant to Diocesan Canon III.9.8, that he may pronounce that The Rev. Steven Maki is released and removed from the ordained Ministry of this Church and from the obligations

attendant thereto, and is deprived of the right to exercise in The Episcopal Church the gifts and spiritual authority as a Minister of God's Word and Sacraments conferred in Ordination.

*On December 12, 2013:*

- VOTED to approve the documents titled "MA Diocesan Bishop Election - Proposed Petition Process" and "Information on Petition Process" presented to the Standing Committee on December 12, 2013, with the edits discussed and agreed upon.
- VOTED, to approve a Stokes Fund Loan in the amount of \$36,000 at 3.75% interest for 3 years, and to provide advice and consent, pursuant to Diocesan Canon 18, for the encumbrance of the property at 14 School Street, Medway, with a customary lien for such loans.
- VOTED, to approve a Stokes Fund Loan in the amount of \$100,000 at 3.75% interest for 15 years, and to provide advice and consent, pursuant to Diocesan Canon 18, for the encumbrance of the property at 24 St. Peter Street, Salem, with a customary lien for such loans.
- VOTED, to approve the purchase of residential property for use as a rectory in the amount of \$3,600,000 and to provide advice and consent, pursuant to Diocesan Canon 18, for the encumbrance of the property at 20 Chestnut Street, Unit 1, Boston, with a lien or liens to secure a \$1,500,000 loan from RBS Citizens Bank and a \$300,000 private loan.
- VOTED to consent to the election of Matthew Alan Gunter as Bishop Diocesan of the Diocese of Fond du Lac.

*On December 13, 2013 electronically:*

- VOTED, that the Standing Committee of the Episcopal Diocese of Massachusetts gives its advice and consent to the Bishop that he may pronounce that The Rev. Dr. Robert B. Tobin, is released and removed from the ordained Ministry of this Church and from the obligations attendant thereto, and is deprived of the right to exercise in The Episcopal Church the gifts and spiritual authority as a Minister of God's Word and Sacraments conferred in Ordination.
- VOTED, that the Standing Committee of the Episcopal Diocese of Massachusetts gives its advice and consent to the Bishop that he may pronounce that The Rev. Francois Trottier is released and removed from the ordained Ministry of this Church and from the obligations attendant thereto, and is deprived of the right to exercise in The Episcopal Church the gifts and spiritual authority as a Minister of God's Word and Sacraments conferred in Ordination.

*On January 3-4, 2014:*

- VOTED, to provide advice and consent, pursuant to Diocesan Canon 18, for the sale of the property at 146 Court Street, Unit B101, Brockton, for an amount not less than 85% of its appraised value of \$98,000.
- VOTED to appoint Colin Johnstone as a new member of the Real Estate Advisory Committee.
- VOTED to approve the by-laws of St. Mary's Church, Dorchester as submitted.
- VOTED that the Standing Committee consents to the election of a Bishop Coadjutor for the Episcopal Diocese of Southeast Florida.
- VOTED that the Standing Committee consents to the election of Allen K. Shin as Bishop Suffragan of the Diocese of New York.

*On January 13, 2014 via telephone:*

- VOTED to approve the Bishop Diocesan Election Slate listed below, as submitted by the Discernment Committee: The Rev. Holly Lyman Antolini, Rector, St. James's Church, Cambridge, Mass.; The Rev. Ronald Culmer, Rector, St. Clare's Church, Pleasanton, Calif.; The Rev. Alan Gates, Rector, St. Paul's Church, Cleveland Heights, Ohio; The Rev. Ledlie Laughlin, Rector, St. Peter's Church, Philadelphia; The Rev. Sam Rodman, Project Manager for Campaign Initiatives, Episcopal Diocese of Massachusetts.

*On February 13, 2014:*

- VOTED to approve the following postulants for candidacy: Vincent Michael Bousquet, James Chapman, Patrick Cheng, Aileen DiBenedetto, Eric Litman, David Prentice, Yolanda Rolle, Sarah van Gulden.
- VOTED to approve the by-laws of All Saints' Church, Brookline as submitted.

- VOTED to approve the Special Rules of Order for the Electing Convention of April 5, 2014 as submitted.
- VOTED that the Standing Committee of the Episcopal Diocese of Massachusetts gives its advice and consent to the Bishop, pursuant to Diocesan Canon III.9.8, that he may pronounce that The Rev. Dana Boynton is released and removed from the ordained Ministry of this Church and from the obligations attendant thereto, and is deprived of the right to exercise in The Episcopal Church the gifts and spiritual authority as a Minister of God's Word and Sacraments conferred in Ordination.

*On February 24, 2014*

- VOTED to accept the following petition candidates to the slate for Bishop Diocesan: The Rev. Timothy E. Crellin, Vicar, St. Stephen's Church, Boston; and The Rev. Canon Mally Lloyd, Canon to the Ordinary, Episcopal Diocese of Massachusetts

*On March 13, 2014:*

- VOTED to approve the following candidates for ordination to the Transitional Diaconate: Patrick Cheng, Jeffrey Hodge, Megan Holding, Christen Mills, Rachael Pettengill-Rasure, David Prentice, Robert Schoeck, Sarah van Gulden, Harry Walton.
- VOTED to approve the following elections to the Old North Church Vestry: Senior Warden: Kit Williams (1 year term), Junior Warden: Jerome Malczewski (1 year term), Chancellor: Judy Porteus (1 year term), Treasurer: Wayne Webster (1 year term), Clerk: Bruce Shaw (1 year term), Vestry Member: Christine Clements (3 year term – renewable), Vestry Member: Bruce Brooksbank (3 year term – renewable)
- VOTED that the Standing Committee consents to the election of a Bishop Coadjutor for the Diocese of Western Texas.

*On April 10, 2014:*

- VOTED to remove the Consecration from the Transition Committee's charge with Pam Werntz as the liaison to a newly formed Consecration Committee with current Consecration subcommittee chair, Rev. Karen Coleman, and members, Rev. Alan Hesse and Mr. Jeffrey Mills. And further, that Colin Johnston be liaison to the Transition Committee with Angela McConney-Scheepers as chair.
- VOTED that the Standing Committee provide its consent in recognition of the request from St. David's Episcopal Mission to (i) close, (ii) liquidate its remaining assets, and (iii) transfer all of its assets to the Protestant Episcopal Diocese of Massachusetts, and (iv) dissolve. It was further VOTED that the Bishop and the Standing Committee consents to reclassify the Mission as a Closing Mission, as provided under Canon 14, Section 4(1) of the Diocese. It was further VOTED to approve the adoption of the Closing Mission by-laws of St. David's Episcopal Mission, such by-laws being prescribed by the Diocese.

*On May 8, 2014:*

- VOTED that the Standing Committee provides its advice and consent, pursuant to Diocesan Canon 18, for the encumbrance by Trinity Church, Concord, of the property at 81 Elm Street, Concord, with a mortgage lien for a construction loan up to an amount of \$2.3 million, consistent with Trinity's Construction Loan Proposal.
- VOTED that the Standing Committee agrees to allow St. Thomas's, Taunton to acquire the land and enter into the proposed reciprocal easements.
- VOTED, as provided for under Canon 14, Section 4(1) of the Protestant Episcopal Diocese of Massachusetts ("Diocese"), that the Standing Committee acting at the request of St. Paul's Episcopal Church, a Massachusetts corporation, provides its advice and consent to the Bishop for the closing of the Mission, liquidation and transfer of its remaining assets to the "Diocese", and its dissolution.
- VOTED that the Standing Committee provides its advice and consent to the Bishop for the sale of the properties owned by The Cathedral Church of St. Paul in the Diocese of Massachusetts located at 33 and 35 Bowdoin Street, Boston, known as the Church of St. John the Evangelist, as provided for under Canon 18, Section 1 of the Diocese, at a price of not less than \$3,400,000 for both parcels OR \$1,650,000 for the property at 33 Bowdoin Street (the Parish House) and \$1,750,000 for the property at 35 Bowdoin Street (the Church).

- VOTED to approve the recommendation that the by-laws for Epiphany Parish, Walpole, be approved with the agreed upon changes.
- VOTED that the Standing Committee approve the recommendation that the by-laws for St. Michael's Church, Holliston, be approved as submitted.
- VOTED to approve the recommendation that the by-laws for St. David's Church, South Yarmouth, be approved with the agreed upon changes.

*On June 18, 2014:*

VOTED that the Standing Committee provides its advice and consent to the granting of a Diocesan loan for St. Andrew's Church, New Bedford in the amount of \$60,000 for up to 15 years at 3.75% interest to identify the source of water leaks in the tower and fix, and to provide advice and consent, pursuant to Diocesan Canon 18, for the encumbrance of the property at 169 Belleville Rd, New Bedford, with a customary lien for such loans.

VOTED that the Standing Committee provide its advice and consent to the granting of a Diocesan loan for St. Martins, New Bedford in the amount of \$63,750 for 15 years at 3.75% interest for upgrading the church hall, refurbish 6 bad radiators and replace asbestos floor tiles, and to provide advice and consent, pursuant to Diocesan Canon 18, for the encumbrance of the property at 136 Rivet St, New Bedford, with a customary lien for such loans.

- VOTED that the Standing Committee approves the merger of St. Mark's Episcopal Church, North Easton; Church of St. John the Evangelist, Mansfield; and St. John's Parish Corporation, Taunton, using the existing St. John's Parish Corporation entity for the combined parishes. And further VOTED, that these combined parishes will take the name Bristol Trinity Episcopal Church. And further VOTED, that the Standing Committee recommends to the Diocesan Bishop that he approve this merger and the naming of the combined parishes. And further VOTED that the Standing Committee approves the adoption of the by-laws for Bristol Trinity Episcopal Church, such by-laws being prescribed by the Diocese.
- VOTED to consent to the election of Rev. Heather Elizabeth Cook as Bishop Suffragan of the Diocese of Maryland.

*On July 22, 2014:*

- VOTED to endorse and bless the work of the Consecration Committee to date.
- VOTED, that the Standing Committee provides its advice and consent, pursuant to Diocesan Canon 18, for the sale of the property at 180 South Road, Pepperell, formerly known as St. David's Mission, at a price not less than \$125,000.
- VOTED, that the Standing Committee provides its advice and consent, pursuant to Standing Committee policy, for the acceptance or acquisition by St. Augustine and St. Martin Church, Boston, of an easement over property at 29 -31 Lenox, Boston, using instruments approved by the Chancellor's Office.
- VOTED, to approve a Green Loan of \$100,000 at 2.75% for 15 years and to provide its advice and consent, pursuant to Diocesan Canon 18, for the encumbrance by St. John's Church, Charlestown, of the property at 27 Devens Street, Boston (Charlestown) with a customary lien.
- VOTED, that the Standing Committee provides its advice and consent, pursuant to Diocesan Canon 18, for the encumbrance by St. Stephen's Church, Cohasset, of the property at 16 Highland Avenue, Cohasset, with a long-term lease for cellular communications equipment, pursuant to draft lease instruments submitted for review.
- VOTED with 4 yeses and 1 no, to approve a modification of an existing Stokes Loan for Christ Church, Hyde Park, to allow for an 18-month period of payment of interest only, after which a reevaluation will be made of the loan.
- VOTED to consent to the election of Brian Richard Seage as Bishop Coadjutor of the Diocese of Mississippi.
- VOTED to consent to the election of Robert Stuart Skirving as Bishop Diocesan of the Diocese of East Carolina.

Respectfully Submitted,  
Rev. Marya DeCarlen & Blanca Silvestrini, co-secretaries

## **COMMISSION ON MINISTRY REPORT TO CONVENTION 2014**

The Commission on Ministry (COM) has the privilege of working with the bishops as they select and guide the formation of postulants and candidates in preparation for ordination to both the diaconate and priesthood. Our work is supported by many others, including sponsoring parishes and clergy, parish discernment committees, internship and field education parishes, seminaries, spiritual directors, and the families and friends of postulants and candidates.

Members of the COM serve as liaisons to parish discernment committees, advisors to postulants and candidates, and meet monthly with the bishop and canon for ordained vocations. They work in collaboration with the Standing Committee to make the ordination process accessible and to improve coordination and communication among all those who participate in the work of discernment in this diocese.

We gratefully acknowledge the assistance and guidance of many in this diocese and beyond who help to form the women and men who are called to ordained leadership in the church. We particularly value the contributions of clergy and laity in preparing postulants and candidates for diaconal ministry and for the support of divinity school faculty.

This past year continued to be a time of transition as we welcomed Rev. Dr. David Killian as the new Chaplain to our postulants and candidates. We are very grateful to Mr. Eric Kimball, Rev. Katie Rimer and Dr. David Urion, who completed terms of service on the Commission on Ministry in 2013. We are also pleased to welcome Rev. Sara Irwin, Mr. Graeme Mills and Mr. David Varner to the COM. We wish Bishop Tom Shaw every blessing as he begins his retirement, and thank him deeply for his leadership over these past two decades, as we are eager to continue our work with Bishop Alan Gates.

### **COM Statistics for 2014**

In 2014 the commission received commitment forms from 12 inquirers, of which 6 filed applications for postulancy after having worked with their parish discernment committees. Of those 6, 2 were accepted as postulants for the priesthood and 2 for the diaconate effective June 1, 2014.

The COM continues to award scholarship assistance to those preparing for Holy Orders. Funding for this assistance comes from a diocesan endowment created in 2001 to support theological education and from donations to the bishops' discretionary funds received during parish visitations. This year \$52,000 was awarded to postulants and candidates. Scholarships ranged from \$4,000 to \$8,000 per person. These scholarships help to address the significant amount of debt incurred by those in the ordination process, which has long-term effects on deployment decisions.

The commission reports the following data for the past year:

In January 2014, 4 transitional deacons were ordained priests. In June 2014, 9 candidates were ordained transitional deacons.

As of July 1, 2014 there were 40 people in the ordination process as postulants, candidates and transitional deacons – 31 for the priesthood and 9 for the diaconate. They come from 32 sponsoring congregations throughout 11 deaneries in the diocese.



The average age of new postulants this year:

<b>Year</b>	<b>Priesthood</b>	<b>Diaconate</b>	<b>Combined</b>
2014	37	63	50

The average age of new postulants over the preceding five years:

<b>Year</b>	<b>Combined</b>
2013	43
2012	41
2011	36
2010	47
2009	45
2008	No new postulants accepted

Our current membership roster is as follows (as of September 2014) : Ms. Ella Davila Auchincloss, Ms. Karon Gibson-Mueller, The Rev. Miriam Gelfer, The Rev. Dr. Libby Gibson, The Rev. Edgar Gutierrez-Duarte, The Rev. Sara Irwin, The Rev. Edwin Johnson, Mr. Graeme Mills, The Rev. Geoffrey Piper, Ms. Kay Ridgard, Mr. David Varner, The Rev. Patricia Zifcak. The Rev. Dr. David Killian serves as Chaplain to our postulants and candidates.

We want to thank the members of the COM for their deep commitment to this ministry. Your diocese is blessed to have these wonderful souls at work, discerning the future leadership of the church. It is our privilege and joy to work with them.

Faithfully Submitted by:  
 Ella Davila Auchincloss and Karon Gibson-Mueller  
 Co-chairs, Commission on Ministry

## Report of the Diocesan Loan Committee 2014

Year 2014, the Diocesan Loan Committee approved the following loans:

Congregation:	Date of Loan	Rate/Amount/Term of Loan
St. Andrews, New Bedford	06/26/2014	3.75% \$ 60,000.00 – 15 years
St. Martins, New Bedford	07/17/2014	3.50% \$ 63,750.00 – 15 years
St. Peters, Cambridge	09/24/2014	3.50% \$ 48,351.00 – 15 years
St. Andrews, New Bedford	10/29/2014	3.75% \$ 40,000.00 – 15 years
St. James, Cambridge	11/19/2014	3.75% \$ 15,000.00 – 15 years
St. Mary of the Harbor, Provincetown	12/19/2014	3.50% \$ 100,000.00 – 15 years
		<b>TOTAL \$327,101.00</b>

As of December 31, 2014, the outstanding loan portfolio was 2,536,009.54 representing 89 loans.

**The SOCIETY for the RELIEF of AGED or DISABLED  
EPISCOPAL CLERGY**

and

**The SOCIETY for the RELIEF of WIDOWS, WIDOWERS and ORPHANS  
of CLERGY of the DIOCESE of MASSACHUSETTS**

Annual Meeting Minutes - March 11, 2014

The annual meetings of the Officers, Trustees and Directors of the Societies were held jointly on Tuesday, March 11, 2014, in the Lawrence Room at the Diocese. The Rt. Rev. Gayle E. Harris opened the meeting with prayer at 12:40 pm. Present were: Bishop Harris, the Rev. Robert Edson, the Rev. Marshall Hunt, Tim Hunt, Catherine Menard, Suzette Phillips, and Alan West.

The minutes of the annual meetings of the Societies held on March 5, 2013 were presented by Bishop Gayle Harris. The acceptance of the Minutes was moved, seconded and unanimously voted:

*That the minutes of the March 5, 2013 Annual meeting of the Society for the Relief of Aged or Disabled Episcopal Clergy and the Annual Meeting of the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Diocese of Massachusetts be accepted as distributed and placed on file. (Attachment A)*

The deaths of the Rev. Gary Rundle, and, Mrs. Madeline (the Rev. Donald) Woodward were noted by Suzette Phillips and a prayer for them and their families was offered by Bishop Harris.

The report of the 2013 distribution of grants for the relief of aged or disabled Episcopal clergy was presented by Bishop Harris, showing \$52,415 in Relief Assistance Grants, and \$68,625 in Insurance Preference Grants. It was moved, seconded and unanimously voted:

*That the Report of 2013 Distribution of Grants by the Society for the Relief of Aged or Disabled Episcopal Clergy be accepted and placed on file. (Attachment B, Green)*

The report of the 2013 distribution of grants for the relief of widows, widowers and orphans was presented by Bishop Harris, showing \$33,524 in Relief Assistance Grants, and \$40,625 in Supplemental Insurance Preference Grants. It was moved, seconded and unanimously voted:

*That the Report of 2013 Distribution of Grants by the Society for the Relief of Widows, Widowers and Orphans be accepted and placed on file. (Attachment C, Pink)*

Catherine Menard presented the treasurer's report for the Society for the Relief of Aged or Disabled Episcopal Clergy. She noted the new 4% draw formula and that the Sears Fund has declined to give a grant for 2014 due to focusing on youth ministry. It was moved, seconded and unanimously voted:

*That the Treasurer's Report for the Society for the Relief of Aged or Disabled Episcopal Clergy for 2013 be accepted as presented and placed on file. (Attachment D, Green)*

The Treasurer's report for the Society for the Relief of Widows, Widowers, and Orphans of Clergy was reviewed. It was noted that the Widows fund is spending down at a higher rate than the Aged. It was moved, seconded and unanimously voted:

*That the Treasurer's Report for the Society for the Relief of Widows, Widowers, and Orphans of Clergy for 2013 be accepted as presented and placed on file. (Attachment E, Pink)*

Cathy Menard then presented the auditor's reports and financial statements prepared by Milton Boyd for both societies, for the year 2013. It was noted that the error noted in Mr. Boyd's Appendix comments was due to an incorrect ledger formula which has been corrected. All the records were found in good order. It was moved, seconded and unanimously voted:

*That the report of the auditor for the Society for the Relief of Aged or Disabled Episcopal Clergy be accepted and placed on file. (Attachment F, Green)*

And:

*That the report of the auditor for the Society for the Relief of Widows, Widowers and Orphans of Clergy be accepted and placed on file. (Attachment G, Pink)*

Bishop Harris presented the nominations for Officers and Trustees of the Society for the Relief of Aged or Disabled Episcopal Clergy. There being no further nominations, it was moved, seconded and unanimously voted:

*That nominations be closed.*

It was moved, seconded and unanimously voted:

*That the following persons be elected Officers and Directors of the Society for the Relief of Aged or Disabled Episcopal Clergy and that one vote be cast by the Secretary for their election.*

Officers:                   The Right Reverend M. Thomas Shaw, SSJE, President  
                                   The Right Reverend Gayle E. Harris, Vice President  
                                   Mr. Timothy Hunt, Treasurer  
                                   Ms. Catherine Menard, Assistant Treasurer  
                                   The Reverend Deborah M. Woodward, Secretary  
                                   Ms. Suzette Phillips, Assistant Secretary

Directors:                   Ms. Barbara Durland  
                                   The Reverend Robert Edson  
                                   The Reverend Marshall W. Hunt  
                                   Mr. Alan West

(Attachment H, Green)

Bishop Harris presented the nominations for Officers and Trustees of the Society for the Relief of Widows, Widowers and Orphans. It was moved, seconded and unanimously voted

*That the nominations be closed.*

It was moved, seconded and unanimously voted:

*That the following persons be elected Officers and Trustees of the Society for the Relief of Widows, Widowers and Orphans of Clergy, and that the Secretary cast one vote for their election.*

Officers:                   The Right Reverend M. Thomas Shaw, SSJE, President  
                                   The Right Reverend Gayle E. Harris, Vice President  
                                   Mr. Timothy Hunt, Treasurer  
                                   Ms. Catherine Menard, Assistant Treasurer  
                                   The Rev. Deborah Woodward, Secretary  
                                   Ms. Suzette Phillips, Assistant Secretary

Trustees                    Ms. Barbara Durland  
                                   The Reverend Robert Edson  
                                   The Reverend Marshall W. Hunt  
                                   Mr. Alan West

(Attachment I, Pink)

It was moved, seconded and unanimously voted:

*That the following Directors and Officers serve on the emergency Finance and Grants Committee for the Society for the Relief of Aged or Disabled Episcopal Clergy during 2014.*

The Right Reverend Gayle E. Harris	Ms. Catherine Menard
The Rev. Marshall Hunt	Mr. Timothy Hunt
Mr. Alan West	

It was moved, seconded and unanimously voted:

*That the following Officers and Trustees serve on the emergency Finance and Grants Committee for the Society for the Relief of Widows, Widowers and Orphans during 2014.*

The Right Reverend Gayle E. Harris	Ms. Catherine Menard
The Rev. Marshall Hunt	Mr. Timothy Hunt
Mr. Alan West	

Cathy Menard informed the board that Milton Boyd has retired as Diocesan Parish Audit Report Coordinator and was succeeded by Mr. Jay Stott. Mr. Stott was proposed as the auditor for both Societies. It was moved, seconded and unanimously voted:

*That the Society for the Relief of Aged and Disabled Episcopal Clergy appoint Mr. Jay Stott as the auditor for 2014.*

And:

*That the Society for the Relief of Widows, Widowers and Orphans of Clergy appoint Mr. Jay Stott as the auditor for 2014.*

Bishop Harris presented the proposed 2014 Relief Assistance and Insurance Preference Grants. The board was informed about pension amounts no longer being available due to the Church Pension Group's decision that this is a breach of confidentiality. It was also noted that two priests - the Rev. Dana Boynton and the Rev. Roger Wootton - are voluntarily requesting release from the ordained ministry of The Episcopal Church. If those actions are finalized we will not include them in these grants. The board was asked to consider a relief grant for the Rev. Victoria Hunt for one year due to excessive dental expenses. The increase was approved with the Rev. Marshall Hunt abstaining. It was moved, seconded and unanimously voted:

*That the proposed 2014 Relief Grants and Supplemental Health Insurance Preference Grants for the Society for the Relief of Aged or Disabled Clergy as outlined in Bishop Harris's Memorandum to the Society with the approved increase be accepted.*

(Attachment J, Green)

It was moved, seconded and unanimously voted:

*That the proposed 2014 Relief Grants and Supplemental Health Insurance Preference Grants for the Society for the Relief of Widows, Widowers and Orphans of Clergy as outlined in Bishop Harris's Memorandum to the Society be accepted with the addition of Ruth Stiess who was omitted on the list be accepted.*

(Attachment K, Pink)

Cathy Menard reviewed the 2014 budget for the Society for the Relief of Aged and Disabled Episcopal Clergy. It was moved, seconded and unanimously voted:

*That the proposed 2014 budget, for the Society for the Relief of Aged and Disabled Episcopal Clergy with the additional grant be approved.*

(Attachment D, Green)

The budget for the Society for the Relief of Widows, Widowers and Orphans of Clergy was presented. It was moved, seconded and unanimously voted with the approved addition:

*That the 2014 budget for the Society for the Relief of Widows, Widowers and Orphans of Clergy be approved.*

(Attachment E, Pink)

Suzette Phillips informed the board that in May of 2013 the Society for the Relief of Aged and Disabled Clergy received the final disbursement of \$3,750.73 from the estate of the Rev. Rudolph Roell. This brings the total of his bequest to \$90,750.73.

Suzette also noted that the Clergy report for 2014 indicates that over 50% (23 of the 42 recipients) are aged 80-95.

There was a discussion about the best way for the board to obtain the yearly pension amounts from recipients. It was voted and seconded that a form be sent to all recipients in December asking for their yearly CPG benefit amount.

We set March 10, 2015 at noon as the Annual Meeting date.

There being no further business, the meeting was adjourned.

Respectfully submitted,

Suzette Phillips, Assistant Secretary

## 2014 REPORT OF THE BOSTON EPISCOPAL CHARITABLE SOCIETY

On Easter Monday, 1724, a little company of Church of England men founded the Boston Episcopal Charitable Society. The mission of the Society is to carry on the vision and compassion of the founders of the Boston Episcopal Charitable Society when they received their charter from the King of England in 1724. For nearly 300 years the Society has improved the lives of elderly and needy Episcopalians in Greater Boston by providing ongoing supplemental financial support. In recent years, working with Episcopal parish priests, we have also sought to identify disadvantaged individuals of all ages whose self-sufficiency, feeling of self-worth and compassion for others could be improved by receiving short-term financial assistance from the Society. We have also widened our giving area beyond Greater Boston. While we will never neglect our initial and primary purpose, our experience to date in short-term assistance has been very gratifying.

At the end of 2014 the Society was providing quarterly assistance to 17 beneficiaries and, with the help of area parishes, had made one-time grants to help another 9 individuals who were in need of short-term financial assistance. At the end of the year we had distributed over \$126,000 in quarterly and one-time grants. The Trustees voted to again distribute block grants totaling \$100,000 to area parishes. Using these funds priests from 13 parishes were able to help over 200 individuals or families facing the inability to pay for their most basic living necessities.

Members are nominated and elected at the Society's Annual Meeting held annually on the first Tuesday in June. The Society currently has approximately 65 members. Each member must be a member of the Episcopal Church and be a resident of the Commonwealth of Massachusetts. We are actively seeking new members.

**The Society strongly encourages parish priests to let us know if there are individuals in their congregation who might be in need of financial help, either on a one-time or quarterly basis.** If you are interested in learning more about the Society, you are invited to contact our administrator, Nina Faragher, at Suite 600, Ten Post Office Square, Boston, Massachusetts 02109, 617-426-6051, or [boston.episcopal.1724@gmail.com](mailto:boston.episcopal.1724@gmail.com).

### Officers:

The Rt. Rev. Gayle Elizabeth Harris, Chairperson  
 The Rev. Thomas B. Kennedy, President  
 Elizabeth Moten, Vice President  
 Amanda McGrady Morrison, Secretary  
 Charles C.J. Platt, Treasurer

### Trustees: Officers and the Following

Frieda Garcia  
 Robert S. Hurlbut, Jr.  
 David S. Lee  
 Sarah W. Wilcox

2014



ANNUAL REPORT







# MISSION STATEMENT

**EPISCOPAL CITY MISSION** is a faith-based ministry which promotes social and economic justice working through partnerships with congregations, community-based organizations and people within the Diocese of Massachusetts with special emphasis on the urban poor and oppressed.

I am constantly amazed by Episcopal City Mission – this long standing and historic institution is still committed to radical change and transformation in the social structures of the world; and even with its long legacy, ECM changes as well.

2014 was the final full year of Dr. Ruy Costa’s almost 16-year tenure as ECM’s Executive Director. During his tenure Episcopal City Mission went through several strategic planning processes and underwent many strategic and programmatic changes. Among the accomplishments of the organization was the founding of the Public Policy Program, which led to increased engagement by the Episcopal Diocese of Massachusetts, including Diocesan Bishops, in justice related policy issues at the Massachusetts State House. Episcopal City Mission also re-syndicated the Morville House, which led to a more than doubling of the ECM endowment and brought a significant annual revenue stream which could be used for ECM programs. ECM also saw a continuation of its long-term social justice related grant making programs. Dr. Costa also strove to integrate the action and reflection methodologies of Paulo Freire into his work, and developed a tool to help communities do deep listening to their own calls in their context. On behalf of the board and myself, I thank Ruy for his years of faithful service to Episcopal City Mission.

## REPORT

from the Chair



I am deeply thankful that our retired suffragan Bishop, the Rt. Rev. Bud Cederholm, has been able to step in and serve as Episcopal City Mission’s Acting Director while the board searches for a new Executive Director. Due to the incredible leadership of Episcopal City Mission’s fine staff, an active and engaged board, and Bishop Bud’s passionate leadership – the mission of ECM has not missed a beat. We are continuing to live out our legacy of helping to realize God’s dream for humanity and creation, through our work of bringing about social and economic justice for the urban poor and oppressed. I am so thankful for everyone’s faithful service during this time of transition!

In 2014 we also welcomed the Rt. Rev. Alan Gates as the Bishop of the Episcopal Diocese of Massachusetts and the President of Episcopal City Mission. Alan brings with him a deep love for the life of the church and parishes, and great experience and knowledge of faith-based community organizing which he gained working with his previous congregation and Greater Cleveland Congregations, an Industrial Areas Foundation affiliate in Cleveland, Ohio. I am excited to partner with him and the work of parishes and the Episcopal Diocese of Massachusetts in justice-making in Eastern Massachusetts and beyond.

We are in an important moment in our nation, as we hear the cries of Black Lives Matter in our streets and income and opportunity inequality continue to skyrocket. We seem to be at a critical moment in our civic conversations about immigration and our ever-present environmental crisis is disproportionately impacting the poor. Our faith-rooted voices for justice are needed more now than ever. Episcopal City Mission’s institutional legacy is about bringing together partners in both the church and the world to speak, organize and bring into being change for justice. We passionately continue that work today!

This annual report outlines many of our exciting partnerships, programs and grants. Please take the time to see all of the exciting work that we have accomplished together over the last year. Thank you for your part in our work, and God’s work, of justice making in the world.

The Reverend Noah H. Evans  
Chair, Episcopal City Mission Executive Committee



## REPORT

from the  
Acting  
Executive Director

In my short time as Acting Executive Director, many powerful words and images come to mind regarding the important work we do together. The one word that stands out most to me is Partnerships (highlighted by Ruy Costa and the reports in last year's annual report). A story written by Marc Gellman in his children's book, *Does God have a Big Toe*, has inspired me over the last 25 years. It is entitled, *Partners*. The story is about creation.

In the beginning before there was earth, there was a huge swirling glob of rocks and water. There also were a few angels and of course, God. The angels asked God when God was going to clean up the mess, and so God collected some of the rocks and water and made planets, stars, oceans, lakes, rivers, and clouds. Things looked neater, but God was not finished. On some of the rocks God placed growing things, living things, and creeping things. The angels asked God if God was finished now. And God said, "Nope."

So God made man and woman from some of the water and dust. Now God was tired, so God asked them to finish up the world since it was almost done. The man and the woman told God they couldn't because they were too little and God had the plans. God said, "You are big enough and if you keep trying, I will be your partner." "What's a partner?" they asked? God answered that "a partner is someone you work with on a big thing that neither of you can do alone. Partners never give up on one another, even when they think their partner is not doing enough, because they depend on one another. We must never stop trying to finish the world". God asked them if they would accept this deal.... and they said YES. The angels asked God again if the world was finished yet and God said. "I don't know, go ask my partners"<sup>1</sup>

Well ECM partners: individuals, congregations, the Diocese of Massachusetts, community organizations, grassroots organizers, grantees, funders, and Morville House, just how are WE doing finishing up God's world? God our partner, has shared the plan with us and it includes Justice, Respect, Peace and Dignity for all people and all life on earth. It still looks like we have a ways to go, but we are first and foremost God's partners, created in God's image to reflect the compassion, mercy, justice and peace of God in finishing up the world with God. And we will never quit!

The story tells us that all humanity is called to be God's partners. That's God's lifelong deal with us. This Annual Report reflects the significant ways God's plan is taking shape in Massachusetts through ECM and our partners, with God's help. We join God's partners all over the world in finishing up the world and fulfilling God's dream for all humanity and creation. Right now I can hear God saying to the angels when they ask God if the world is finished yet, "I don't know; go ask my good and faithful partners, you know... the ones who are Episcopal City Mission and their partners." Dear friends and partners, I believe you will find a partial answer to the angels' question in the pages of this annual report. The world may not be finished but we see light and progress thanks to the ECM staff, Executive Committee, Committee members, and our partners. Enjoy the journey, God's partners we are!

The Rt. Rev. Bud Cederholm  
Acting Executive Director

<sup>1</sup> *Does God Have a Big Toe*, pp.1-2 Gellman and de Mejo: Harper and Row Junior Books, NY, NY.

## ECM Celebrates 40th Anniversary of the Burgess Urban Fund at the Annual Dinner

*On June 9, 2015, Episcopal City Mission celebrated the 40th anniversary of the Burgess Urban Fund (BUF). The BUF was established to mark the retirement of the Right Reverend John Melville Burgess and to honor his commitment to social justice. ECM is proud to have been entrusted with the responsibility of carrying out Bishop Burgess' legacy and, as we look back over the last 40 years, ECM is excited to see the far-ranging positive impact the BUF has had on our communities.*

### THE FIRST FORTY YEARS

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The quote below is proclaimed by the man whose commitment to justice was the inspiration for the development of the Burgess Urban Fund, and whose ongoing ministry challenged the Episcopal church to its relevancy to the lives of the poor. For 40 years, the BUF has provided a way for us as Episcopalians to respond to poverty and oppression in our communities. Each year, the BUF provides grants to organizations that work to address the systemic causes of urban poverty through community organizing and grassroots leadership development. With these grants, ECM puts resources into the hands of those who are working to create permanent change in their lives and in their communities.

Over the last 40 years, the BUF has awarded nearly \$5 million in grants to 283 community organizations seeking to provide access to: employment, transportation, decent and affordable housing, healthcare, and a just judicial system. The BUF also has made grants which provided essential resources to the struggle for worker and immigrant rights, and the overall fight for the rights of the poor and marginalized of our society.



“Our true and essential mission is to the world, and not to ourselves.”

- *The Rt. Rev. John Melville Burgess, Twelfth Bishop of Massachusetts*



## THE NEXT 40 YEARS AND MORE

We are at a moment of tremendous opportunity for Episcopalians to demonstrate the mission of God through the church's solidarity with those striving for economic and racial justice. As the nation has struggled with the tragic deaths of Michael Brown, Eric Garner, Tamir Rice and Freddie Gray, we realize that the forces that divide us remain strong. This is our time to respond – to speak for hope and to fight for change. The challenges have never been bigger. If we ignore these challenges, the church's relevance in American culture could be irretrievably lost.

This is the work of the Burgess Urban Fund to live out the mission of God through partnership between church and the community, to fight the injustices that divide us and, with God's help and in solidarity with the poor and marginalized, to work towards creating what Dr. Martin Luther King called the "beloved community" based on sisterly and brotherly love.

*ECM was successful at the 2015 Annual Dinner in raising \$40,000 for the 40th anniversary.*

*Top Left: ECM Social Justice Award winners: (L-R) June Cooper of City Mission Society accepts for Boston Warm Coalition; The Rev. Ed Cardoza, Still Harbor; Ella Auchincloss, LDI; and The Rev. Liz Steinhauser, St. Stephen's in Boston's South End*

*Bottom Left: Sister Simone Campbell during her inspirational keynote reads from her book, "A Nun on the Bus"*

*Right Top: The Rev. Ed Rodman called Mel King up to join him on stage.*

*Right Middle: ECM's Acting Director, Bishop Bud Cederholm (center) talks with Bishop Burgess' daughters, Margaret Burgess Harrison (left) and Julia Burgess (right)*

*Right Bottom: The Rev. Canon Ed Rodman, one of the original four who steered the direction of the Burgess Urban Fund, is flanked by Renata Teodoro (left), Co-Founder of the Student Immigrant Movement, a current Burgess Urban Fund grantee and Katie Campbell Simons, ECM's Associate Director of Community Partnerships & Public Policy*





# ECM IS ALL ABOUT PARTNERSHIPS

To live out our mission of promoting social and economic justice for all, ECM supports and collaborates with three primary entities: the Episcopal Diocese of Massachusetts, its parishes as well as statewide and local non-profit organizations and other initiatives that work to bring justice to all members of society.

Through our three partnership initiatives, ECM both gives and receives. We award grants, collaborate on projects, give guidance and learn new ways to engage in the community to help create social change.

ECM also remains nimble in order to respond quickly to opportunities as they present themselves.





*Campers at Barbara C. Harris Camp and Conference Center*

*ECM continues to work closely with the Episcopal Diocese of Massachusetts. We support programs and new initiatives that address issues facing the urban poor, especially through leadership development and community organizing.*

ECM's partnership with the Diocese is embodied in its financial support of several key diocesan programs. We support the The Barbara C. Harris Camp and Conference Center so that more low-income campers can spend a week at camp. The **Life Together Program** is a 10-month fellowship for young adults that teaches them to be prayerful and prophetic leaders for the church and the world. The **Leadership Development (LDI) Initiative** works with congregations to give them leadership skills for the changing face of the church and for engagement in social justice. We also support LDI by serving as their fiscal sponsor.

ECM's partnership with the diocese was deepened with our contribution to the Together Now Comprehensive campaign. A large percentage of that gift was allocated to the **Mission Institute** and **Mission Hubs**. The Mission Institute is a collaboration between ECM, The Diocese of Massachusetts and the Episcopal Divinity School to provide people in congregations with the training that they need to more fully take part in the mission of the church. They provide workshops, consulting and online resources for congregations. The Mission Hubs are collaborative ventures between three or more Episcopal Congregations for the work of spiritually-grounded mission in their local context. There are now seven Mission Hubs launched throughout the diocese.

Finally, ECM collaborated deeply with the Diocese of Massachusetts on this year's congregational Spring Learning Event; titled, "Mobilizing the Church: Moving from Dreaming to Doing" the event brought inspiring speakers and informative workshops together for an event that focused on how churches can engage in community organizing work with a grounding in social and racial justice.





*Top: Campers at Barbara C. Harris Camp and Conference Center*

*Bottom Left: Life Together Fellows and Staff*

*Right: Participants at the 2015 ECM & Diocese of MA Spring Learning Event*



## Connecting with Congregations

### *Annual Meeting*

The 2014 Annual Meeting of the Corporation was held at Grace Church in Newton. We welcomed Bishop Alan Gates to his first ECM Meeting as President of the Corporation. The meeting focused on discussions of the corporate actions ECM has taken as an investor and Alexia Salvatierra's Faith-Rooted Organizing model of understanding power.

### *Mission Discernment Days*

ECM continues to reach clergy, delegates and other lay leaders interested in social justice and organizing at our Mission Discernment Days. Mission Discernment Days were held at Christ Church, Cambridge and, for the first time on Cape Cod, at St. David's Church, Yarmouth. These events are intended to introduce people to ECM's work and engage them in a conversation about justice in their own context.

### *Parish Grants*

Every year ECM makes grants to parishes to support work that fights poverty and injustice in their local community. We focus on supporting groups that challenge the systems that allow poverty to thrive. At the end of 2014, we gave \$55,000 in grants to four parishes.

*St. Stephen's Episcopal Church, Boston* - St. Stephen's was awarded a grant for their continued work with the BLOCS Program (BLOCS = Building Leadership; Organizing Communities and Schools). The program engages teens, young adults, and community residents in the school partnership with the Blackstone Innovation School and mobilizes parents and teens around neighborhood concerns, including community safety.

*St. Andrew's Episcopal Church, New Bedford* - St. Andrew's is examining how they use their after school program as a springboard for social change. They will be hosting community dinners and conversations with various stakeholders in their community and in their ministry to children. They will attend the All Our Children Conference, which focuses on church-school partnerships.

*Trinity Church, Haverhill* - Trinity Church is an urban parish in a community that struggles with poverty. They are working with many partners in the city and in the Merrimack Valley to improve the health and well-being of children and families. They will use the money to support community meetings and one-to-one meetings, as well as leadership training for the team.

*Ecclesia/common cathedral* - Among many things, Ecclesia promotes the leadership development of homeless and formerly homeless people. The leadership development in this community is an important stepping stone from which many go on to advocate for themselves and their neighbors.

### *Public Policy*

Much of ECM's work with Parishes also took the form of Public Policy work. See page 16 to see how we engaged parishes in our policy work. Parishes were especially engaged in the Meet Our Legislators Events (MOLEs) and the Beloved Community team.



*Right: Ecclesia/common cathedral art project.*

*Right Middle: A student and his mentor from the St. Andrew's, New Bedford after school program*

*Below: Participants at ECM's 2014 Annual Meeting*





## Reaching out to the Wider Community

In addition to working within the Episcopal Church, ECM reaches out to other partners in the wider community. In this work, we partner with both faith-based and secular organizations. We strive to support and collaborate with partners who are working to achieve justice for the poor and oppressed.

### Morville House

It was another busy and productive year at Morville House. In November 2014, Morville House was recognized by the New England Affordable Housing Management Association as a “Community of Quality”. The organization determines its outcome based on the property as a whole including the training of staff, quality of activities and satisfaction of the residents.

*A Morville House resident volunteer, Barry DeVincke, was awarded the Flansburgh Traveling Fellowship from Boston By Foot and traveled to Florence, Italy in April 2015 to study the architecture. Many residents participated in the planning of the renovation of Symphony Park, adjacent to Morville House and have been enjoying the beautiful space after the summer 2015 opening.*

*After a long and snowy winter, Pedro Escoto, our veteran superintendent of 33 years, reported that not only were he and his crew of Arnaldo Colon and Jose Flores able to keep the property plowed and shoveled, they cleaned the residents’ cars of snow and kept the neighboring walkways clear. They did have some help as this year Pedro got his dream come true of a tractor/snow blower which made the snow removal much more efficient. Other building improvements include a new look on the outside as the waterproofing and painting of the façade continues.*

*The Morville House activity schedule was as busy as ever with the Pancake breakfast cooked by the staff and the upcoming Cookout. Regular events include: English classes taught by Elizabeth Ross, Activities Coordinator as well as a resident run food bank which happens every other week. Morville House continues to offer yoga, exercise, art classes, and computer classes in Russian, Mandarin and English. The Residents’ Council meets monthly with Linda Brown, Resident Service Coordinator, and the staff values their input and suggestions.*

*Adrienne Polk, Assistant Manager continues to meet with residents in determining eligibility status and their affordable rent. Gail Ann Kessel, Property Manager, oversees the whole project on a daily basis, keeps the funding going strong and, along with Maloney Properties, Inc. and Kathy Luce (Regional Manager) ensures Morville House maintains a safe, affordable and high quality of life for all our residents.*



*Morville House residents on a field trip*



“I just want to prove that the Episcopal Church could be relevant to the lives of the poor.”

– *The Right Reverend John Melville Burgess, Twelfth Bishop of Massachusetts*

## Burgess Urban Fund

Forty three years ago, Bishop John Melville Burgess had the foresight and desire to create a fund to serve the needs of those outside the Church, especially the poor, the left out and the disadvantaged. Originally named the Joint Urban Fund, the fund was renamed the Burgess Urban Fund to honor Bishop Burgess upon his retirement in 1975.

Central to our engagement with the wider community, the Burgess Urban Fund (BUF) supports grassroots community organizing working to address the systemic causes of urban poverty in Massachusetts. In the last 40 years has awarded nearly \$5 million in grants to 283 community organizations working for low-income people. Focus areas are: affordable housing, workers’ rights, immigrants’ rights, the wellbeing of youth and seniors, faith-based and poverty organizing.



*Left: Student Immigrant Movement camp*

*Top Right: Gordon Davis, a local activist and member of Worcester Homeless Action Committee (WHAC) protests the fight against restrictive pan-handling regulations. WHAC has appeared and testified for the need for better outreach services rather than a punitive measure that would re-move panhandlers from streets and intersections.*

*Middle Right: EPOCA Community Organizer Cassandra Bensahih and Apprentice Marinella Blake at Jobs NOT Jails Action.*





*ECM and Haymarket People's Fund grantees at 4th Annual Grantee Gathering.*

## 4th Annual Grantee Gathering

In the fall of 2014, ECM along with our partner, Haymarket People's Fund hosted our 4th Annual Grantee Gathering for our current Burgess Urban Fund grantees and Haymarket's funded organizations. Over 130 people from 40 grassroots community organizations came together to be inspired and energized in their mission to bring about justice for all people. This year, ECM opened the invitation to our parish grantees and other Episcopal partners; we were so glad that some of them were able to join us for a day of sharing and learning about organizing for social justice. This gathering is an opportunity for groups to come together with other organizations working on similar issues from across New England. The objective is to provide an opportunity for our grantees to share their work and learn from other organizations about their missions, thus deepening efforts to build a social justice movement across New England. This year we had the privilege of hosting Carlos Saavedra, from Movement Mastery. Carlos is a seasoned organizer and facilitator who has been trained in leadership and organizing by the most prominent institutes and coaches in the field of social change. Carlos led the group through exercises and dialogue focused on relationship building, types of organizing, and movement ecosystems! It was an inspiring, emotional and thought-provoking day. We thank our partners at Haymarket People's Fund for working with us on this event and look forward to hosting many more.

## Burgess Urban Fund 2014 Grantees:

In December 2014, ECM awarded its 2014 grants to 20 grassroots community organizers.

**Agencia ALPHA, Boston** – Utilizing guiding values based on their Christian faith, Agencia ALPHA is dedicated to educating and serving the immigrant community of Boston by providing social programs and working to advocate for policy changes that will improve the quality of life of all immigrants.

**Boston Youth Organizing Project** – Led by youth and supported by adults, united in a common purpose, BYOP works to increase youth power and create positive social change. They achieve this by identifying values, building relationships across differences, training and developing leaders, identifying key issues of concern, and taking action for justice.

**Brazilian Immigrant Center, Brighton** – This Portuguese-speaking Boston non-profit focuses on workers rights and workplace justice. BIC specifically organizes among domestic workers whose rights are poorly defined under state and federal labor laws.

**Brazilian Women's Group, Brighton** – Supports and empowers the development of women in the Brazilian community in greater Boston. BWC focuses on immigration issues, workers rights, and community development.

**Brockton Interfaith Community** – BIC organizes members of the community to achieve power for positive change, reaching across ethnic, racial and religious lines.

**Centro Comunitario de Trabajadores, New Bedford** – A Latin American-run worker organization challenging unfair labor practices, taking collective action to address their problems and uniting with others in the struggle for economic and social justice.

**Community Economic Development Center of Southeastern Massachusetts, Fall River** – Works to create a more just local economy by building bridges to resources, networks and cooperative action for low-income members of our community. Specifically focused on improving the quality of and access to public transportation in Southeastern Massachusetts.

**Dominican Development Center, Jamaica Plain** – Develops and empowers Dominican immigrants as well as immigrants representing all Latin American and Caribbean communities to achieve social justice by promoting and organizing around current laws, legal procedures, education, immigration reform, and human rights.

**Dorchester Bay Economic Development Corporation: Youth Force** – Trains local teens to be community leaders and community organizers, who in turn train other teens to be leaders and organizers.

**Ex-Prisoners Organizing for Community Advancement, Worcester** – Ex-prisoners work together with allies, friends and families to create resources and opportunities for those who have paid their debt to society.

**Greater Four Corners Action Coalition, Dorchester** – Works to utilize every available resource to stabilize and enhance the livability of the Four Corners community in Dorchester by empowering residents to take action and ensure their voices are heard locally and regionally.

**Massachusetts Community Action Network, Dorchester** – A network of faith-based community organizations that prioritize leadership development, relationship building, and power in numbers to engage decision makers on our proposed solutions to community problems.

**Merrimack Valley Project, Lawrence** – A regional power organization, created by faith communities and labor groups back in 1989, works to address job loss, foreclosures and the decline of public services in their area, through leadership development and community organizing strategies.

**MetroWest Worker Center, Framingham** – Working to build a multi-ethnic, multi-lingual community based power in the immigrant and low-income worker communities of MetroWest in order to eliminate abusive labor practices and racial profiling

**Student Immigrant Movement, Boston** – A statewide immigrant youth-led organization that identifies, recruits and develops leaders who are invested in improving their communities through relational building, leadership development and electoral organizing.

**United Neighbors of Fitchburg** – An organization that works to promote and maintain a spirit of community among Fitchburg's diverse peoples and neighborhoods, by fostering equitable economic, educational, health, cultural social and recreational opportunities.

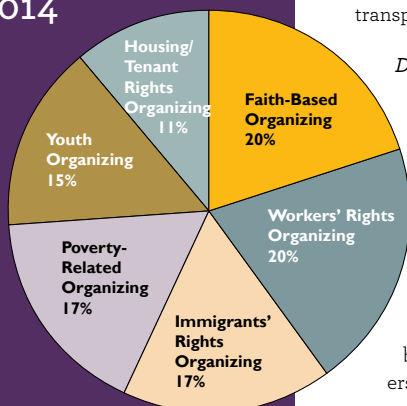
**WATCH, Waltham** – A CDC that works towards a more just community in the Waltham area by promoting affordable housing, providing leadership development and empowering residents through civic engagement.

**Women Encouraging Empowerment, Revere** – Works to educate, protect and advance the rights of immigrants, refugees, and low-income women and their families through organizing, leadership development and service delivery.

**Worcester Homeless Action Committee** – Formerly and currently homeless persons who work in partnership and take action to provide housing and shelter for all those who are in need in Greater Worcester. The current campaign focuses on educating and organizing the public about better discharge planning statewide, as a feeder to the homeless population.

**Youth on Board, Boston** – A project forging partnerships between youth and adults to create positive educational communities in which young people are valued, engaged and heard. YOBB works to bring the student voice and engagement to the forefront of the educational movement on a national level.

## Funding Areas 2014



## 2015 Out-Of-Cycle Burgess Urban Fund Grants

BUF Out-of-Cycle grants are awarded to programs, initiatives, and/or events that are one-time opportunities rather than ongoing organizational programs. They fall outside of the annual grant cycle but are a way for ECM to broaden our community engagement in supporting organizing for social change. They provide a unique way for ECM to collaborate with new partners and increase our visibility in the wider community and deepen the impact of our funds through collaboration. All Out-of-Cycle grants support initiatives that are directly linked to ECM's mission and the mission of the Burgess Urban Fund. In the Spring of 2015 BUF award \$10,000 in Out-of-Cycle grants.

### *Essex County Community Organization (ECCO)*

ECCO is a congregation-based community organization on the North Shore of Massachusetts. In response to the President's Executive Order in November 2014 that created the ability for 4-5 million undocumented immigrants to obtain protection against deportation and a legal status to work, ECCO saw an opportunity to train immigrant leaders to lead clinics in their congregations with the goal of engaging hundreds of undocumented immigrants in community organizing campaigns. In January 2015 ECCO immigrant leaders participated in a 4-day national training, these local leaders then trained teams in 10 congregations across the North Shore, training a total of 39 new community leaders to conduct workshops across the region. The ECCO teams have conducted one immigration screening workshop each month since January. At these screenings, 143 undocumented immigrants were screened. ECCO's new leaders are very proud of having learned the skills to screen people for an immigration benefit and even more importantly, they are deeply grateful for having the opportunity to serve as leaders in their community and help their brothers and sisters.

### *Neighbors United for A Better East Boston (NUBE)*

NUBE is a multi-ethnic, member-led, direct-action organization formed in 2008 by a diverse group of East Boston residents that holds public institutions accountable through grassroots organizing. In the spring of 2015 East Boston faced a State Representative Special Election due to the former State Representative resigning. NUBE saw this as a unique opportunity to change the voting electorate and increase voter turnout from unlikely voters in their community! Their organizing and community education ensured that candidates were accountable to immigrant rights and economic justice policies. During the spring NUBE, along with community partners, called and door-knocked over 1,000 voters with 400 voters pledging to vote and 300 voters pledging to support the Right to Remain in Boston. A new just cause eviction policy for the city of Boston that will begin to implement tenant protection and combat the destabilization of Boston tenants who are being forced out of their homes by speculative developers. They also co-hosted a bi-lingual, immigrant led State Representative candidate forum with over 100 attendees from the community and a "World Cafe" style discussion with the Special Election State Representative candidates and 60 community participants.





## Wider Community Partnership Grants

The goal of ECM's Wider Community Partnership Grants program is to support and partner with like-minded organizations in the community that are working to address issues of social and economic injustice. This grant program, like all other grants awarded by ECM is coordinated by an ECM staff person in collaboration with a committee made up of ECM Board members, partners from parishes and the wider community. In 2015 ECM awarded \$50,000 in grants.



Above: UUMass Action Detention Center Vigil

Right: UUMass Action Immigration Rally

Below: BU students and mentors in Partakers College Behind Bars Mentoring Program at BU Graduation ceremony held at the prison



Left: NUBE, MassVote & Right to the City Boston Candidate Meet & Greet; (Bottom left) NUBE, MassVote, and Right to the City Boston (RTCB) volunteers called and door-knocked over 1,000 voters with 400 voters pledged to vote and 300 voters pledge to support the Right to Remain in Boston.

### **Boston Faith and Justice Network**

An organization of Christians seeking justice through personal, community, and policy change. BFJN gathers Christians from many different traditions sharing a common concern to love our neighbor through economic discipleship and engages them to think about resources, from the money we earn, to the food we eat, to the places we live. This grant will fund general operating costs and a series of short digital storytelling resources. These short videos will feature public narrative from men and women whose giving has been impacted by the practice of economic discipleship. These individuals will share how they have shifted their personal spending to be able to give more generously.

### **City Mission Society**

City Mission Society of Boston catalyzes action to root out poverty in our neighborhoods by means of programs and activities that embody the following guiding principles of empowerment, education and partnership. CMS has identified homelessness prevention as the organization's primary focus. In 2014 City Mission Society took a leadership role in convening and managing the Religious Leaders for Long Island Refugees/Boston Warm and will continue to work with this coalition of leaders. This grant will support their work with Boston Warm and the engagement of participants from their Public Voice Project in that initiative. The PVP has served as a vehicle to promote civic engagement and social justice by delivering personal stories of homelessness to members of congregations since 2005.

### **Cooperative Metropolitan Ministries**

Founded in 1966 by clergy and laity to address poverty, housing and racial justice, CMM's mission is to mobilize congregations and communities across economic, religious, racial, and ethnic boundaries so that, in partnership, we can work more effectively for a just and peaceful society. This grant will assist in funding the launch of Values over Violence, a collaboration with clergy and other religious leaders, both urban and suburban, to

come together to address the employment needs of youth, including those in the court system, in the Department of Youth Services, and in the ranks of ex-offenders.

### **Massachusetts Council of Churches**

"A network of individuals, congregations and denominations convinced that what binds us together in Christ is stronger than what divides us." MCC is working to lead the renewal of the vibrant, ecumenical local church in Massachusetts, encouraging critical, adaptive ministry and creating opportunities for Christian advocacy and interfaith dialogue. This grant will fund their general operating expenses and specifically their collaboration work with ECM in the Ecumenical Advocacy Coalition and their work with #BostonWarm.

### **Partakers**

A faith-based, non-profit organization founded in 1997 to address the issue of education as the key factor in providing rehabilitation and impacting the rate of prisoner recidivism. Partakers' mission is to reduce prisoner recidivism through community mentoring and the advancement of education. They are committed to advancing restorative justice, rehabilitation and the healing transformation of both prisoners and society. Their grant will fund their correspondence course program and their mentoring program which partners members of the faith community with students during incarceration and after their release.

### **UU Mass Action**

An organization founded to build a more unified and collective voice for Unitarian Universalists in Massachusetts around issues of justice and to create a space for resource sharing and leadership development among parishes undertaking social justice work. This grant will support their general operating expenses and their continued organizing work on immigration reform, criminal justice reform and environmental justice.





## ECM Creating Social & Structural Change

*ECM's public policy work is a thread throughout all of our partnerships. We continue to work with parishes, community partners, grantees and the diocese to create social and structural change in our communities and statewide. We do this in many ways!*

### *ECM Convenes*

We provide staff time to coordinate, plan and host meetings of several collaborations and coalitions:

- The Beloved Community collaboration is a partnership with Episcopalians around the diocese interested in fighting for racial and economic justice. This group includes our partners at the Leadership Development Initiative, Life Together, B-PEACE and several parishes.
- The Ecumenical Advocacy Coalition brings together our faith partners to share experience and host events.

The Economic Justice Funder Network – ECM collaborates with EJFN to foster a more just, equitable and democratic society through joint learning, strategy and funding. We use our collective resources to support grassroots organizing and movement building in communities of color and low-income communities across Massachusetts.

### *ECM Stays Current*

ECM tracks issues that are important to our mission and our partners. We attend community and leadership meetings and take part in statewide actions:

- After the closure of the Long Island Bridge in October of 2014, many of Boston's religious leaders were quick to respond, forming the Boston Warm Coalition to advocate on the behalf of displaced shelter residents and provide places to get out of the cold.



Above: Raise Up MA rally for Fight for \$15 (minimum wage)

Top Right: Voter Registration at Beloved Community event

Bottom Left: State Senator Linda Dorcea Forry attended the first "Meet Our Legislator"

Bottom Right: Event at St. Mary's Episcopal Church in Dorchester



- With the growth of the Black Lives Matter Movement ECM has increased our attention to issues surrounding Criminal Justice Reform. The Jobs Not Jails Coalition includes many of ECM's grantees and is followed closely by the Beloved Community group. This year they are advocating for the Justice Reinvestment Act.
- After last year's legislative victory on the minimum wage increase, Raise Up MA continues to fight for workers in Massachusetts. In the fall their ballot question in support of earned sick time passed. The coalition has turned its attention to the Fight for \$15, Paid Family Leave and the campaign for Progressive Revenue.

### ECM Takes Action

Through recruitment, organizing and participation in events, ECM is helping to raise awareness and create change!

- Through the Beloved Community group, ECM has turned out Episcopalians for voter registration in minority neighborhoods, Youth Jobs Advocacy events, including the Youth Jobs Rally, the Mother's Day Walk for Peace, the Jobs not Jails Campaign and the Fight for \$15.
- Through our Meet Our Legislators Events (MOLEs) ECM has helped connect parishes to their local legislative leaders, so they can be more effective at taking action in the future, as well as learn about their policy-makers' goals.

### ECM Informs and Educates Our Constituents

ECM continues to spread the word to our constituents through email, Facebook and conversations about opportunities to engage in justice.

- This year our Public Policy Advocacy Network brought back monthly policy briefing emails so our network can stay up-to-date on the issues ECM is following.
- ECM has also used our Mission Discernment Days all around the diocese to introduce people to ECM's public policy work and offer them opportunities to become engaged.
- ECM was one of five organizations to host four nights of Faith & Ballot: Forums on the 2014 MA Ballot Questions

## Report from the Treasurer:

As reflected on the attached Statement of Financial Position, Episcopal City Mission's finances came to a positive close on December 31, 2014. Total assets stood at \$26,349,501 at the end of 2014. The endowment benefitted from strong performance during 2014, with the return on our endowment portfolio at 8.52% for the year.

In our Annual Dinner, our guest speaker, Sister Simone Campbell, challenged us to consider how we can align our values as disciples of Christ with our values as citizens. She asked that we, as Christians and as citizens, let our:

*"... hearts be broken open. Be community. Be involved."*

As a sign of our commitment to our community and to the world, and to mitigate the impact of negative environmental policies which disproportionately impact the poor, the ECM Board voted to divest our endowment from fossil fuel companies in the spring of 2013. In looking at the return on our endowment over the last year and half, I am pleased to report that the endowment has not been negatively impacted by this decision. After divesting, ECM has continued to enjoy positive investment returns, and in fact the returns on our fossil-free portfolio outperformed an equivalent all market (including fossil fuels) capitalization benchmark by nearly 6%.

As a means of challenging corporations to adhere to more socially responsible policies, ECM co-sponsored two important corporate shareholder actions. In partnership with our investment advisor, Trillium Asset Management, ECM sponsored shareholder actions with:

- Discovery Communications - To encourage greater board diversity.
- Wells Fargo - For disclosure of its political spending and lobbying efforts.

ECM's involvement in these actions helped to bring about a 23.1% and 22% vote, respectively, in favor of these proposals, and laid the groundwork for eventual change at these companies.

Each year, ECM seeks to renew its commitment to use its financial resources as a means of positive change in our society. Through our financial practices, ECM seeks to do as Sister Simone challenged to us to do: To be involved and to be community. ECM hopes, by bringing our values as Christians in-line with our values as investors, and managing our financial resources with an eye towards the ever-increasing needs of the poor in our communities, we can serve as a witness to Christ and help to bring about more just and sustainable economic practices in our world.

For more detail, please review the preliminary financial reports accompanying this report.

Respectfully,



Andree Saulnier,  
Treasurer

## STATEMENT OF ACTIVITIES

	For The Year Ended December 31, 2014*			For The Year Ended December 31, 2013		
	Unrestricted	Temporarily Restricted	Total	Unrestricted	Temporarily Restricted	Total
<b>INCOME</b>						
Interest and dividends, net of fees	\$247,455	\$68,411	\$315,866	\$200,762	\$57,375	\$258,137
Contributions from individuals, parishes & organizations	\$186,270	\$13,075	\$199,345	\$72,977	\$ 18,434	\$91,411
Diocesan grants	-	\$30,000	\$30,000	-	\$30,000	\$30,000
Other income	\$7,845	\$604	\$8,449	\$47,425	\$576	\$48,001
Net assets released from restrictions	\$89,701	(\$89,701)	-	\$122,294	(\$122,294)	-
<b>Total operating income</b>	<b>\$531,271</b>	<b>\$22,389</b>	<b>\$553,660</b>	<b>\$443,458</b>	<b>(\$15,909)</b>	<b>\$427,549</b>
<b>EXPENSES</b>						
Community and Economic Development	\$340,712	-	\$340,712	\$505,086	-	\$505,086
Parish and Diocesan Programs	\$200,357	-	\$200,357	\$416,492	-	\$416,492
Housing Related Programs	\$59,457	-	\$59,457	\$51,780	-	\$51,780
Public Policy	\$57,326	-	\$57,326	\$51,387	-	\$51,387
Constituent Education	\$201,823	-	\$201,823	\$168,823	-	\$168,823
Administration	\$325,944	-	\$325,944	\$303,578	-	\$303,578
<b>Total expenses</b>	<b>\$1,185,619</b>	<b>-</b>	<b>\$1,185,619</b>	<b>\$1,497,146</b>	<b>-</b>	<b>\$1,497,146</b>
Change in net assets from operations	(\$685,216)	\$13,253	(\$671,963)	(\$1,053,688)	(\$15,909)	(\$1,069,597)
<b>OTHER INCOME</b>						
Ground lease fee and accrued interest	\$193,935	-	\$193,935	\$181,700	-	\$181,700
Accrued interest on mortgage	\$297,762	-	\$297,762	\$318,784	-	\$318,784
Realized gain (loss) on sale of investments	\$1,024,758	\$297,831	\$1,322,589	\$930,823	\$254,598	\$1,185,421
Increase (decrease) in unrealized gain	(\$222,485)	(\$72,224)	(\$294,709)	\$1,083,972	\$355,740	\$1,439,712
<b>Total non-operating income</b>	<b>\$1,293,970</b>	<b>\$225,607</b>	<b>\$1,519,577</b>	<b>\$2,515,279</b>	<b>\$610,338</b>	<b>\$3,125,617</b>
<i>Change in net assets</i>	<i>\$639,622</i>	<i>\$247,996</i>	<i>\$887,618</i>	<i>\$1,461,591</i>	<i>\$594,429</i>	<i>\$2,056,020</i>

## STATEMENT OF FINANCIAL POSITION

## ASSETS

Investments at market value at year end	\$17,009,814	\$16,107,434
Other assets	\$9,339,687	\$9,836,854
<b>TOTAL ASSETS</b>	<b>\$26,349,501</b>	<b>\$25,944,288</b>

## LIABILITIES AND NET ASSETS

Liabilities	\$613,272	\$1,095,677
Net assets:		
Unrestricted	\$21,790,141	\$21,150,519
Temporarily restricted	\$2,191,421	\$1,943,425
Permanently restricted	\$1,754,667	\$1,754,667
Total net assets	\$25,736,229	\$24,848,611
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$26,349,501</b>	<b>\$25,944,288</b>



*We are grateful to the parishes that supported our 2014 initiatives.*

CHURCH OF OUR SAVIOUR, *Arlington*

ST. PAUL'S CHURCH, *Bedford*

ST. CYPRIAN'S CHURCH, *Boston*

ST. JOHNS ST. JAMES CHURCH, *Boston*

ST. MARK'S CHURCH, *Dorchester*

TRINITY CHURCH IN THE CITY OF BOSTON, *Boston*

ALL SAINTS PARISH, *Brookline*

CHURCH OF OUR SAVIOUR, *Brookline*

ST. PAUL'S CHURCH, *Brookline*

CHRIST CHURCH, *Cambridge*

SAINT PETER'S CHURCH, *Cambridge*

ST. JOHN'S CHAPEL, *Cambridge*

TRINITY CHURCH, *Canton*

ST. STEPHEN'S CHURCH, *Cohasset*

ST. LUKE'S CHURCH, *Fall River*

TRINITY CHURCH, *Haverhill*

CHURCH OF THE HOLY SPIRIT, *Mattapan*

GRACE CHURCH, *Medford*

ST. PAUL'S CHURCH, *Natick*

GRACE CHURCH, *New Bedford*

GRACE CHURCH, *Newton*

GRACE CHURCH, *North Attleborough*

ST. MARY'S CHURCH, *Rockport*

EMMANUEL CHURCH, *Wakefield*

PARISH OF THE EPIPHANY, *Winchester*

## *Executive Committee*

### **BISHOPS**

The Right Reverend Allan M. Gates,  
President

The Right Reverend Gayle E. Harris,  
Vice President

The Rev. Canon Mally Lloyd  
(representing Bishop Gates)

### **OFFICERS**

The Rev. Noah Evans, Chair

Erin Alarcon, Vice-Chair

Louise Gant, Secretary

Andree Saulnier, Treasurer

Dr. Ruy O. Costa, Executive Director (2014)

The Right Reverend Bud Cederholm, Acting  
Executive Director (2015)

### **MEMBERS**

The Rev. Dr. Christian Brocato

The Rev. Jacqueline Clark

Marisa Egerstrom

The Rev. Dr. Lisa Fortuna

James Gammill

William Haynsworth

The Rev. Edwin Johnson

Hazel Johnson

The Rev. John K. Kaoma

Jason Long

Dr. Margaret Post

The Rev. Matthew Stewart

## *Staff and Committees*

### **STAFF**

Katie Campbell Simons,  
Associate Director for Community  
Partnerships and Public Policy

Lucena Daley, Operations Manager

Mary Beth Mills-Curran, Coordinator of  
Church Based Ministries

Joseph Sheeran, Life Together Fellow  
(2013-2014)

Lydia Strand, Life Together Emmaus Fellow  
(2014-2015)

### **ADVISORY COMMITTEE ON PUBLIC POLICY**

James Gammill, Chair

Frank Austin

Rick Collins

Marisa Egerstrom

The Rev. Dr. Norman Faramelli

The Rev. Karen Montagno

Dr. Margaret Post

Allan Rodgers

Josh Young II

### **ADVISORY PARISH GRANT COMMITTEE**

The Rev. Dr. Christian Brocato

The Rev. Edgar Gutierrez-Duarte

Hazel Johnson

Janet Miranda

The Rev. Barbara Williamson

### **BUDGET COMMITTEE**

Andree Saulnier, Chair

The Rev. Noah Evans

James Gammill

William Haynsworth

### **BURGESS URBAN FUND COMMITTEE**

The Rev. Matthew Stewart, Chair

The Rev. Jacqueline Clark

Betsy Feldmann

Jason Long

The Rev. Dr. Lisa Fortuna

The Rev. Edwin Johnson

The Rev. Brian Murdoch

Dr. Alexandra Pineros-Shields

Margaret Sullivan

### **CLERGY WORKING GROUP**

The Rev. Zenetta Armstrong

The Rev. Rainey Dankel

The Rev. Noah Evans

The Rev. Edwin Johnson

The Rev. Lori Mills-Curran

The Rev. Pamela Wertz

### **EVENT COMMITTEE**

The Rt. Rev. Roy F. Cederholm, Jr.,  
Bishop Suffragan, Retired

The Rev. Arrington Chambliss

Lucena Daley

The Rev. Noah Evans

Andree Saulnier

### **FINANCE COMMITTEE**

Andree Saulnier, Chair

Frank Butler

The Rev. Noah Evans

James Gammill

William Haynsworth

Kristen Stewart

### **FINANCIAL AUDIT COMMITTEE**

Andree Saulnier, Chair

Erin Alarcon

William Haynsworth

### **LEGAL AUDIT COMMITTEE**

Erin Alarcon, Chair

The Rev. Noah Evans

Andree Saulnier

### **MORVILLE HOUSE BOARD**

Bill Haynsworth, President

Eileen O'Brien, Clerk

Laura Vennard, Treasurer

Dorothy Hibbard

Catherine Riley

Susan Smith

Richard Xu

### **NOMINATIONS COMMITTEE**

The Rev. Noah Evans, Chair

The Rev. Zenetta Armstrong

The Rev. Arrington Chambliss

The Rev. Dr. Norman J. Faramelli

### **PERSONNEL COMMITTEE**

Louise Gant, Chair

Erin Alarcon

Dr. Priscilla Dickson

The Rev. Noah Evans

The Rev. Dr. Norman Faramelli

William Haynsworth

### **SHAREHOLDER RESOLUTIONS REVIEW COMMITTEE**

The Rev. Dr. Christian Brocato

The Rev. Noah Evans

Marisa Egerstrom

James Gammill

Andree Saulnier

### **WIDER COMMUNITY PARTNERSHIPS COMMITTEE**

The Rev. Dr. Christian Brocato, Chair

Erin Alarcon

The Rev. Zenetta Armstrong

Hazel Johnson

The Rev. K. John Kaoma

The Rev. Samuel Rodman



Margaret Coffin Prayer Book Society  
Episcopal Diocese of Massachusetts

President - The Rev. Marshall W. Hunt, P.O. Box 1205, East Harwich, MA 02645 Tel. 508/432-2612  
Clerk - The Rev. Richard T. Loring, 114 Badger Terrace, Bedford, MA 01730 Tel. 781/275-0656

April 18, 2015

Ms. Laura Simons  
Convention Office  
Diocese of Massachusetts  
138 Tremont Street  
Boston MA 02111

Dear Laura:

Here's the report of the Margaret Coffin Prayer Book Society for the year 2014, for inclusion in the 2014 Diocesan Journal (or 2015 if 2014 has already gone to press):

REPORT OF THE MARGARET COFFIN PRAYER BOOK SOCIETY FOR 2014

The Margaret Coffin Prayer Book Society is the only organization in New England for the free distribution of the Book of Common Prayer and the Hymnal, and continues the work of a little-known Boston woman, Margaret Coffin (1769-1855), who was confirmed when Bishop Samuel Seabury held the first such service ever held in Boston, at Christ Church (Old North), March 29, 1786. She loved the Prayer Book, which she referred to as "the second greatest book in the world." (Her personal Prayer Book is in the Diocesan Library.) She became convinced that the best witness to her faith was to give away Prayer Books to friends, and especially to the destitute who could not afford them. Her self-effacing evangelism was made permanent by provision in her will. The Society was established in 1856, the year after her death, and continues this work to the present, now approaching 160 years since its founding.

The Officers of the Society are the Rev. Marshall W. Hunt, President; Mrs. Douglas B. (Susan) Harding, Vice-President; F. Davis Dassori, Treasurer; and the Rev. Richard T. Loring, Clerk.

Since the last Report to Convention, dated April 27, 2014, the Society has distributed:

to St. John's Episcopal Church, the Rev. Charmaine Kathmana  
2109 17th Street, Kenner, LA 70062

25 Spanish Prayer Books  
25 Spanish/English Hymnals  
25 "Lift Every Voice and Sing (LEVAS)

to Christ Episcopal Church, the Rev. Napoleon Brito  
Norcross, GA 30071-2040

200 Spanish Prayer Books

to Chaplain at Boston College & Northeastern University  
the Rev. Judith L. Stuart (continued over)

Freely distributing the Book of Common Prayer for one hundred fifty years.

Address:  
SHAN OVERTON  
36 Winship Street  
Brighton MA 02135

50 Books of Common Prayer

Requests for Prayer Books and/or Hymnals may be made to the Society, care of the President, the Rev. Marshall W. Hunt, at P.O.Box 1205, East Harwich MA 02645-6205. We provide free Prayer Books and/or Hymnals on request, with a Bishop's endorsement, to parishes, missions and institutions, at home and abroad, when they are unable to purchase them.

*Richard T. Loring*

The Rev. Richard T. Loring, Clerk,  
Margaret Coffin Prayer Book Society  
April 18, 2015



## The Creation Care Task Force Report to Diocesan Convention 2014 October 6, 2014



In the fall of 2013, Diocesan Convention overwhelmingly passed the resolution: “A Call for Environmentally Responsible Investing.” The following January Bishop Bud Cederholm invited interested clergy and lay members of the diocese to plan a task force “to assist congregations, vestries, and affiliated diocesan organizations in implementing this resolution and facilitate education programs,” as stated in the implementation requirements of the resolution. Consequent to several discussions, the Creation Care Task Force (CCTF) was formed, to be led by a Coordinating Committee: Anne Ipsen Goldman (co-chair), Dawn Tesorero (co-chair), Bishop Bud Cederholm, and Esther Powell. This committee formulated a mission statement, logo, and an organizational chart.

**Mission Statement:** *In accordance with the resolution passed by the 2013 Convention, the Creation Care Task Force will facilitate the response of the Diocese by supplying educational programs for individuals and congregations, assisting Diocesan organizations with the call to divest and re-invest, and providing links to advocacy resources and environmental organizations.*

The CCTF has four working groups, open to all members of the Diocese and each convened by a member of the coordinating committee. To date, the main activities of these groups have been:

Divestment/reinvestment (convened by B. Cederholm): 1. Met with members of the Trustees of Donation about implementation of the resolution; 2. Submitted a new resolution to Convention 2014 calling on the Episcopal Pension and Church Endowment Funds to divest. This resolution has been coordinated with several other dioceses that will submit similar resolutions to their upcoming conventions.

Advocacy (convened by D. Tesorero): 1. Facilitates the national monthly conference call, “Episcopalians for a Stable Climate;” 2. Encouraged participation by members of the Diocese in the Climate March of September 21 in New York City – two members of the coordinating committee attended along with 42 youth organized by Tim Crellin and Jenny Sazama and hundreds from Mass. including dozens of Episcopalians who joined the 400,00 marchers; 3. Participated in discussions among religious leaders and the groups, “Environmental Tax Reform of Massachusetts” and “Massachusetts Climate Action Network.”

Education (convened by A. I. Goldman) – This group provides volunteers to the Diocesan Creation Care Initiative by maintaining a speaker/preaching bureau that will bring programs and events to deaneries, individual congregations, and vestries. Planned topics include: Food Issues related to global warming, sustainability, and animal justice; The Why and How of Divestment/Reinvestment; and Sustainable buildings and houses of worship. In addition, group members will facilitate the screenings and provide discussion guides of movies from the Diocesan library. The production of an inspirational video is being planned.

Communications (staffed by E. Powell) is the link between the various groups with the Diocese at large. Esther is the liaison between the Diocesan Creation Care Initiative and the Education group. She maintains the Creation Care webpage on the Diomass.org website and Facebook page (TBA) that contain spiritual and theological resources, workshop and retreat event announcements, ideas for children and youth on caring for creation. Anyone interested in scheduling an event or joining one of the working groups of the Task Force may contact Esther Powell at [epowell@diomass.org](mailto:epowell@diomass.org)

*THE most critical moral and justice issue the church and world faces today is Climate Change. If not now, when? If not us, who?*

Respectfully submitted,  
Anne I. Goldman and Dawn Tesorero  
Co-chairs, Creation Care Task Force

## Progress Report from the Trustees of Donations to the 229<sup>th</sup> Convention of the Episcopal Diocese of Massachusetts on a Call for Environmentally Responsible Investing

In 2013, Diocesan Convention passed a resolution that called upon the Trustees of Donations to take a number of steps regarding environmentally responsible investing and to issue an interim report to Diocesan Convention in 2014. The following is a progress report on actions taken by the Trustees of Donations in response to specific resolves within the resolution.

1. **Resolved**, that the 228th Convention of the Episcopal Diocese of Massachusetts commends the Trustees of Donations for their ongoing engagement on climate change as a high priority, and for their work in concert with the Interfaith Center on Corporate Responsibility and coalition members of CERES to encourage companies in which they invest to:
  - increase the transparency of their efforts to influence climate change legislation through lobbying; and take all financially, technologically, and operationally feasible steps toward minimizing their greenhouse gas emissions;

**Response:** The Trustees of Donations continues as a member both of the Interfaith Center for Corporate Responsibility and of CERES. Both organizations enable shareholder activism through submitting and voting for shareholder resolutions. The Trustees of Donations vote all shareholder resolutions in stock under our direct control and follow CERES guidelines for votes on environmental resolutions. Examples of the effectiveness of shareholder activism include:

- In 2011 ICCR members file 13 shareholder resolutions addressing the financial risk of coal-fired energy generation, and the hazards of coal mining and waste disposal. ICCR resolution at Ameren (Union Electric) calling for safer coal ash waste disposal wins 52% of the vote.
- In 2012 ICCR members file 10 resolutions addressing the community and environmental impacts of hydraulic fracturing. ICCR & IEHN release “Extracting the Facts: An Investor Guide to Disclosing Risks from Hydraulic Fracturing Operations”.
- After intense shareholder pressure, William Castell, Chair of BP’s Safety, Environment and Ethics Committee steps down, and BP announces that it will appoint an independent expert to oversee implementation of safety improvements in the Gulf to improve accountability, in compliance with a request made by CBIS, other ICCR members, and their allies. \* from ICCR.org
- When Ceres began working with leading institutional investors to engage companies on the financial risks and opportunities from climate change, only a handful of sustainability shareholder resolutions were being filed. Since then, shareholders have secured climate-related commitments from more than 350 companies with nearly 150 resolutions filed in 2014. \*from CERES.org

2. **Resolved**, that the 228th Convention of the Episcopal Diocese of Massachusetts calls on all managers of Episcopal endowments to divest by freezing all direct investments in the Carbon Tracker top 200 fossil fuel companies, as measured by proven carbon reserves;

**Response:** Action on this resolve will be taken after the Trustees of Donations completes the “best-in-class” analysis called for in the next resolve.

3. **Resolved**, that the 228th Convention of the Episcopal Diocese of Massachusetts calls on the Trustees of Donations to: initiate the research necessary to identify "best in class" fossil fuel companies committed to the reduction of their carbon footprints and the development of alternative clean energy; to provide Convention 2014 with a progress report and a plan whereby, as of November 1, 2018, none of assets of the Diocesan Investment Trust will be invested in fossil fuel companies not deemed "best in class;"

**Response:** The Trustees of Donations have retained Sustainalytics to develop a “best-in-class” screening framework and criteria for fossil fuel companies. Once established, this framework will guide the Trustees investment decisions regarding fossil fuel companies. The framework will address such issues as:

- Involvement in unconventional extraction

- Involvement in thermal coal extraction,
- Environmental policies, related management systems, greenhouse gas reduction programs, Carbon Disclosure Project participation,
- Carbon intensity, carbon intensity trend, renewable energy use, clean tech, and
- Controversy track record including negative impact and public policy controversies.

The Trustees “best-in-class” framework will be made available for comment in 2015.

**4. Resolved**, that the 228th Convention of the Episcopal Diocese of Massachusetts calls upon the Trustees of Donations to:

- *design an alternative investment vehicle that is free from fossil fuel production companies, one that might also include companies that offset the use of fossil fuels and/or invests significantly in clean renewable energy;*
- *conduct a survey of all managers of Episcopal endowments to gauge interest in such an alternative vehicle and the availability of assets;*
- *report to Diocesan Council, Convention, and all potential investors in the diocese the results of the survey and, if feasible, make available the alternative vehicle to investment;*

**Response:** The Trustees of Donations have authorized our investment consultant, PrimeBucholz, to conduct a search for an investment vehicle that excludes fossil fuel production companies, invests in companies that offset the use of fossil fuels and/or invests in renewable energy companies or companies that promote energy conservation. That search should be completed within the first half of 2015 and will be used to conduct a survey of clients of the Trustees to determine the demand and feasibility of such an alternative investment vehicle.

In the last nine months, the Trustees of Donations have spent and committed to spend a total of \$52,500 to conduct the “best in class” study and to search for a “fossil fuel free” investment vehicle. The Trustees of Donations will present two greener investment options by Diocesan Convention 2015. One will be a “fossil fuel free” investment vehicle. The other will blend “best in class” screening with active proxy voting.

Over the next two years, the Trustees will continue to meet with the proponents of the Resolution on Environmentally Responsible Investing and representatives of the Investment Advisory Committee of Diocesan Council as we work together to implement an effective, green investment policy.

**CLERGY RECORDS  
2014**

**ORDAINED TO THE TRANSITIONAL DIACONATE**

Patrick Cheng, Pastoral Associate, Emmanuel Church, Boston  
 Jeffrey Dodge, Curate, St. Luke's Church, San Francisco, CA  
 Megan Holding, Curate, St. Paul's Church, Brookline  
 Christen Mills, Curate, St. Peter's Church, Weston  
 Rachael Pettengill-Rasure, Deacon-in-Charge, Church of Our Saviour, Milton  
 David Prentice, Deacon, Emmanuel Church, Wakefield  
 Robert Schoeck, Curate, St. James, Lancaster, PA  
 Sarah van Gulden, Assistant to the Rector, St. Stephen's Church, Lynn  
 Harry Walton, Deacon-in-Charge, Trinity Church, Stoughton

**ORDAINED TO THE PRIESTHOOD**

Jacqueline Clark, Assistant Rector, St. Elizabeth's Church, Sudbury  
 Andrew Goldhor, Assistant Rector, Church of Our Redeemer, Lexington  
 Sarah Kelb, Priest-in-Charge, St. Paul's Church, North Andover  
 Paula Toland, Priest-in-Charge, St. John's Church, Franklin  
 Stephen Trever, Assistant Rector, St. Mark's Church, Berkeley, CA

**BECAME CANONICALLY RESIDENT**

Richard Burden, Rector, All Saints, Brookline  
 Jacqueline Clark, Assistant Rector, St. Elizabeth's Church, Sudbury  
 Michael Dangelo, Rector, Church of the Redeemer, Chestnut Hill  
 Susan Rainey Dankel, Associate Rector, Trinity Church, Boston  
 Rebecca Gettel, Assistant Rector, Trinity Church, Concord  
 Deborah Little Wyman  
 Christopher Morck, Priest-in-Charge, Grace Church, New Bedford  
 Rita Powell, Assistant Rector, Trinity Church, Boston  
 Sarah Robbins-Cole, Rector, St. Michael's Church, Holliston  
 Elizabeth Whitmore, Deacon, St. Mary's Church, Barnstable

**LICENSED TO OFFICIATE**

Judith Atkinson, Associate Rector, St. James's Church, Cambridge  
 J. Carr Holland, Minister, Sciasconset Union Chapel, Nantucket  
 Harry Jean-Jacques, Associate Priest, Church of the Holy Spirit, Mattapan  
 Matthew Johnson, Deacon, Trinity Church, Bridgewater  
 Elibariki Phillip Kutta, Bridge Priest, Grace Church, North Attleboro  
 Richard Lewis, St. Anne's Church and St. John's Church, Lowell  
 Sarah Lewis, St. Anne's Church and St. John's Church, Lowell  
 Betty Ann Long, St. John's Church, Sandwich  
 Lucas Mix, MIT  
 James Nuzzo, Parish of All Saints, Dorchester  
 Michael Robinson, Park School, Brookline  
 N. DeLiza Spangler, Retired  
 Kevin Sparrow, St. James's Church, Somerville

**TRANSFERRED TO OTHER DIOCESES**

K. Jeanne Person	New York
Katherine N. Mitchell	East Carolina
Adam P. Thomas	Connecticut
Victoria Pretti	New Jersey
Beth Maynard	Springfield
John L. Hooker	Western Massachusetts
Robert Hensley	Chicago
Mark McKone-Sweet	San Diego
Margaret Bullitt-Jonas	Western Massachusetts
Anne Emry	Oregon

**DEATHS**

Spencer Rice	1/15/2014
Frederick Phinney	1/21/2014
Kenneth Arnold	1/24/2014
SherrillBronson Smith	3/18/2014
Oscar Swensen	4/3/2014
John J. Bishop	4/8/2014
Herman T. Silvius	4/10/2014
Theodore W. Lewis	4/19/2014
Ellen Bradshaw Aitken	6/15/2014
Dale Van Meter	6/27/2014
Eugene C. McDowell	8/12/2014
Donald P. Miller	10/15/2014

**REMOVALS**

Dana Boynton  
Roger Wootton

**RETIREMENTS**

Curtis G. Almquist, SSJE  
Michael Billingsley  
Mark Brown  
Susan Esco Chandler  
E. Gale Davis  
Robert D. Edmunds  
L. Nelson Foxx  
Miriam C. Gelfer  
Peggy Howell  
William Kondrath  
Armand Kreft  
Joseph T. Pinho  
Linda Privitera  
Richard S. Signore  
Barbara E. Stowe  
Maryalice Sullivan  
Truman Welch

## Postulants and Candidates for Holy Orders as of April 15, 2014

### **Candidates**

#### **Name**

Vincent M. Bousquet  
 James D. Chapman  
 Patrick S. Cheng  
 Aileen E. DiBenedetto  
 Jeffrey A. Dodge  
 Megan Holding  
 Charlotte H. LaForest  
 Eric R. Litman  
 Christen H. Mills  
 Rachael Pettengill-Rasure  
 David Prentice  
 Yolanda Antoinette Rolle  
 Robert Hughes Schoeck  
 Sarah A. van Gulden  
 Harry E. Walton

#### **Sponsoring Church**

St. John's Church, Charlestown, MA  
 St. James's Church, Amesbury, MA  
 Christ Church, Cambridge, MA  
 St. Stephen's Memorial Church, Lynn, MA  
 Church of Our Saviour, Brookline, MA  
 Trinity Church, in the city of Boston, Boston, MA  
 St. Anne's in-the-Fields Church, Lincoln, MA  
 Church of the Advent, Boston, MA  
 All Saints' Church, Chelmsford, MA  
 Grace Church, Medford, MA  
 St. John's Church, Gloucester, MA  
 Emmanuel Church, Boston, MA  
 St. John's Church, Newtonville, MA  
 St. Mark's Church, Burlington, MA  
 Trinity Parish, Melrose, MA

### **Postulants**

#### **Name**

Thomas A. Bartlett  
 Zachary Brooks  
 Edward M. Cardoza  
 Marisa Egerstrom  
 Isaac Everett  
 Philip Flaherty  
 Emily J. Garcia  
 Robert Greiner  
 Nickolas Griffith  
 Kristine M. Holmes  
 Elizabeth Jordan  
 Patrick LaFortune  
 Matthew J. Lindeman  
 Stephen McAllister  
 Stephen J. McCarthy Jr.  
 Jennifer McCracken  
 Marilyn McMillan  
 Daphne Ning Zhao  
 Suyapa V. Perez  
 Brian Raiche  
 Ruthann Savage-King

#### **Sponsoring Church**

Emmanuel Church, Boston, MA  
 Church of the Redeemer, Chestnut Hill, MA  
 St. Thomas's Church, Taunton, MA  
 Church of St. John the Evangelist, Boston, MA  
 Cathedral Church of St. Paul, Boston, MA  
 St. Stephen's Church, Cohasset, MA  
 The Episcopal Chaplaincy at Harvard, Cambridge, MA  
 Church of St. John the Evangelist, Boston, MA  
 St. James's Church, Cambridge, MA  
 Christ Church, Plymouth, MA  
 St. John's Church, Charlestown, MA  
 St. Stephen's Memorial Church, Lynn, MA  
 Christ Church, South Hamilton, MA  
 Cathedral Church of St. Paul, Boston, MA  
 St. Paul's Church, Natick, MA  
 Christ Church, Needham, MA  
 St. Barnabas's Church, Falmouth, MA  
 All Saints Parish, Brookline, MA  
 St. Luke's-San Lucas Church, Chelsea, MA  
 St. Paul's Church, Newburyport, MA  
 Grace Church, Newton, MA

Amy Whitcomb Slemmer  
Charles Stang  
Noah Van Niel  
Christopher Whiteman  
Andrea C. Wyatt  
Charles A. Wynder Jr.

St. Stephen's Church, Cohasset, MA  
St. John's Church, Charlestown, MA  
Church of the Good Shepherd, Waban, MA  
St. Mary's Church, Dorchester, MA  
Church of the Good Shepherd, Watertown, MA  
Church of the Holy Spirit, Mattapan, MA



**Episcopal Visitations  
2013 - 2014 Liturgical Year**

<b>Church</b>	<b>Date</b>	<b>Bishop</b>
Ayer, St. Andrew's Church	6/8/2014	Harris, G.
Beverly, St. Peter's Church	10/26/2014	Harris, G.
Boston, Church of the Advent	12/1/2013	Shaw
Boston, Church of St. Augustine and St. Martin	12/8/2013	Shaw
Boston, Episcopal Boston Chinese Ministry	12/22/2013	Harris, G.
Boston, Church of St. John the Evangelist	5/4/2014	Harris, G.
Boston, Church of St. John the Evangelist	9/14/2014	Gates
Boston, St. Stephen's Church	10/26/2014	Gates
Boston, Emmanuel Church	11/2/2014	Gates
Bridgewater, Trinity Church	5/18/2014	Shaw
Brookline, St. Paul's Church	12/15/2013	Shaw
Brookline, All Saints Parish	5/4/2014	Shaw
Brookline, Church of Our Saviour	6/1/2014	Harris, G.
Burlington, St. Mark's Church	1/12/2014	Harris, G.
Cambridge, St. Peter's Church	2/23/2014	Shaw
Cambridge, St. James's Church	3/9/2014	Shaw
Cambridge, Christ Church	10/19/2014	Gates
Charlestown, St. John's Church	1/5/2014	Shaw
Dartmouth, St. Peter's Church	3/9/2014	Harris, G.
Dorchester, St. Mary's Church	2/16/2014	Shaw
Fall River, St. Luke's Church	11/23/2014	Harris, G.
Framingham, St. Andrew's Church	3/30/2014	Shaw
Franklin, St. John's Church	12/8/2013	Harris, G.
Groveland, St. James's Church	4/27/2014	Harris, G.
Groveland, St. James's Church	4/27/2014	Harris, G.
Groveland, St. James's Church	11/16/2014	Gates
Hanover, St. Andrew's Church	2/9/2014	Harris, G.
Hingham, Parish of St. John the Evangelist	11/23/2014	Gates
Holliston, St. Michael's Church	12/1/2013	Harris, G.
Hopkinton, St. Paul's Church	9/7/2014	Harris, G.
Hudson, St. Luke's Church	2/23/2014	Harris, G.
Lawrence, Grace Church	4/13/2014	Harris, G.
Lexington, Church of Our Redeemer	1/12/2014	Harris, G.
Lincoln, St. Anne's in-the-Fields Church	4/6/2014	Shaw

<b>Church</b>	<b>Date</b>	<b>Bishop</b>
Lowell, St. Anne's Church	1/26/2014	Harris, G.
Lynn, St. Stephen's Memorial Church	2/2/2014	Shaw
Mansfield, Church of St. John the Evangelist	1/5/2014	Harris, G.
Marblehead, St. Michael's Church	10/12/2014	Gates
Marion, St. Gabriel's Church	3/9/2014	Harris, G.
Marshfield, Trinity Church	3/16/2014	Harris, G.
Mattapan, Church of the Holy Spirit	10/19/2014	Harris, G.
Medford, Grace Church	4/16/2014	Shaw
Natick, St. Paul's Church	4/27/2014	Shaw
Newburyport, St. Paul's Church	1/26/2014	Shaw
Newton Centre, Trinity Church	2/2/2014	Harris, G.
North Easton, St. Mark's Church	1/5/2014	Harris, G.
Norwood, Grace Church	12/8/2013	Harris, G.
Quincy, Christ Church	5/18/2014	Harris, G.
Rockport, St. Mary's Church	4/20/2014	Harris, G.
Salem, St. Peter's Church	10/5/2014	Harris, G.
Scituate, St. Luke's Church	2/9/2014	Harris, G.
Sharon, St. John's Church	1/19/2014	Harris, G.
Southborough, St. Mark's Church	10/5/2014	Gates
Sudbury, St. Elizabeth's Church	4/6/2014	Harris, G.
Swampscott, Church of the Holy Name	3/30/2014	Harris, G.
Taunton, St. John's Church	1/5/2014	Harris, G.
Waltham, Christ Church	3/2/2014	Shaw
Watertown, Church of the Good Shepherd	3/16/2014	Shaw
West Roxbury, Emmanuel Church	5/18/2014	Harris, G.
Whitman, All Saints' Church	3/2/2014	Harris, G.
Winchester, Parish of the Epiphany	4/13/2014	Shaw

**Episcopal Official Acts**  
**2013 - 2014 Liturgical Year**

<b>Church</b>	<b>Date</b>	<b>Bishop or Rep</b>	<b>Action</b>	
Acton, Church of the Good Shepherd	10/4/2014	Harris, G.	Deanery Confirmation	2 C
Acton, Church of the Good Shepherd	5/31/2014	Harris, G.	Confirmation	12 C; 1 R
Andover, Christ Church	10/29/2014	Gates	Institution	Michael Hodges
Arlington, St. John's Church	5/31/2014	Harris, G.	Confirmation	1 C
Auburndale, Parish of the	5/10/2014	Shaw	Deanery Confirmation	2C
Ayer, St. Andrew's Church	4/19/2014	Shaw	Confirmation	4C; 1R
Ayer, St. Andrew's Church	4/19/2014	Shaw	Deanery Confirmation	4C; 1R
Bedford, St. Paul's Church	5/31/2014	Harris, G.	Confirmation	6 C
Belmont, All Saints' Church	5/31/2014	Harris, G.	Confirmation	5 C
Boston, Church of the Advent	5/31/2014	Harris, G.	Deanery Confirmation	5 C
Boston, St. Stephen's Church	5/31/2014	Harris, G.	Confirmation	2 C
Boston, Trinity Church, in the city of Boston	5/31/2014	Harris, G.	Confirmation	37 C; 5 R
Boston, Trinity Church, in the city of Boston	1/26/2014	Shaw	Institution	Samuel Thames Lloyd III
Bridgewater, Trinity Church	5/17/2014	Harris, G.	Confirmation	1 C; 1 R
Brookline, All Saints Parish	5/4/2014	Shaw	Institution	Richard Burden
Brookline, All Saints Parish	5/31/2014	Harris, G.	Deanery Confirmation	1C; 1 R
Brookline, Boston University Chaplaincy	5/10/2014	Shaw	Deanery Confirmation	1R
Brookline, St. Paul's Church	5/10/2014	Shaw	Deanery Confirmation	9C
Brookline, St. Paul's Church	5/31/2014	Harris, G.	Confirmation	1C
Cambridge, Harvard College	3/30/2014	Shaw	Confirmation	4C; 1R
Cambridge, St. James's Church	5/31/2014	Harris, G.	Confirmation	2 C; 3 R
Charlestown, St. John's Church	1/5/2014	Shaw	Confirmation	2R
Chelmsford, All Saints' Church	5/3/2014	Harris, G.	Confirmation	4C 1 R
Chelsea, St. Luke's-San Lucas Church	5/3/2014	Harris, G.	Confirmation	2C
Chestnut Hill, Church of the Redeemer	5/10/2014	Shaw	Deanery Confirmation	14C
Chestnut Hill, Church of the Redeemer	11/18/2014	Gates	Institution	Mike Dangelo
Cohasset, St. Stephen's Church	5/3/2014	Cederholm	Deanery Confirmation	5 Confirmed at St. John's in Duxbury
Concord, Trinity Church	5/31/2014	Harris, G.	Confirmation	6 C
Danvers, All Saints Episcopal Church of the North Shore	5/3/2014	Harris, G.	Confirmation	5 C

<b>Church</b>	<b>Date</b>	<b>Bishop or Rep</b>	<b>Action</b>	
Duxbury, Church of St. John the Evangelist	5/3/2014	Cederholm	Deanery Confirmation	16 Confirmed at St. John's in Duxbury
Fall River, Church of the Holy Spirit	5/17/2014	Harris, G.	Confirmation	5 C
Framingham, St. Andrew's Church	3/30/2014	Shaw	Confirmation	9R
Framingham, St. Andrew's Church	10/4/2014	Harris, G.	Deanery Confirmation	1 C
Framingham, St. Andrew's Church	3/30/2014	Shaw	Confirmation	9R
Franklin, St. John's Church	5/31/2014	Harris, G.	Confirmation	2 C
Franklin, St. John's Church	5/17/2014	Harris, G.	Confirmation	6 C
Gloucester, St. John's Church	5/3/2014	Harris, G.	Confirmation	1 R
Groveland, St. James's Church	5/3/2014	Harris, G.	Confirmation	5 C
Hanover, St. Andrew's Church	5/3/2014	Cederholm	Deanery Confirmation	8 Confirmed at St. John's in Duxbury
Hingham, Parish of St. John the Evangelist	5/31/2014	Harris, G.	Deanery Confirmation	1C
Hingham, Parish of St. John the Evangelist	5/3/2014	Cederholm	Deanery Confirmation	11 Confirmed, 3 Reception at St. John's in Duxbury
Holbrook, St. John's Church	5/3/2014	Cederholm	Deanery Confirmation	1 Received at St. John's in Duxbury
Hudson, St. Luke's Church	5/31/2014	Harris, G.	Deanery Confirmation	2C; 2R
Ipswich, Ascension Memorial Church	5/3/2014	Harris, G.	Confirmation	4 C; 6 R
Lynnfield, St. Paul's Church	5/10/2014	Cederholm	Deanery Confirmation	8 Confirmed at Christ Church, Needham
Lynnfield, St. Paul's Church	5/3/2014	Harris, G.	Deanery Confirmation	5 C with Bp. Barbara Harris
Marblehead, St. Michael's Church	5/3/2014	Harris, G.	Confirmation	6 C
Marion, St. Gabriel's Church	5/17/2014	Harris, G.	Confirmation	1 C
Marshfield Hills, Trinity Church	5/3/2014	Cederholm	Deanery Confirmation	8 Confirmed at St. John's in Duxbury
Mattapan, Church of the Holy Spirit	10/4/2014	Harris, G.	Deanery Confirmation	8 C
Medfield, Church of the Advent	5/10/2014	Shaw	Deanery Confirmation	3C
Milton, St. Michael's Church	5/10/2014	Shaw	Deanery Confirmation	14C
Natick, St. Paul's Church	5/10/2014	Shaw	Deanery Confirmation	4C
Needham, Christ Church	11/12/2014	Gates	Institution	Nick Morris-Kliment
New Bedford, Grace Church	5/17/2014	Harris, G.	Confirmation	10 C
Newton, Grace Church	10/22/2014	Gates	Institution	Regina Walton
Newton Highlands, Parish of St. Paul	5/10/2014	Shaw	Deanery Confirmation	3C
Newtonville, St. John's Church	10/4/2014	Harris, G.	Deanery Confirmation	1 C

<b>Church</b>	<b>Date</b>	<b>Bishop or Rep</b>	<b>Action</b>	
Newtonville, St. John's Church	5/1/2014	Shaw	Deanery Confirmation	1C
Newtonville, St. John's Church	4/29/2014	Harris, G.	Institution	Rev. Mark Edington, Rector
Quincy, Christ Church	5/3/2014	Cederholm	Deanery Confirmation	2 Confirmed at St. John's in Duxbury
Saugus, St. John's Church	5/3/2014	Harris, G.	Confirmation	1 C; 2 R
Scituate, St. Luke's Church	5/3/2014	Cederholm	Deanery Confirmation	4 Confirmed at St. John's in Duxbury
Shirley, Trinity Chapel	10/4/2014	Harris, G.	Deanery Confirmation	1 C
Somerset, Church of Our Saviour	5/17/2014	Harris, G.	Confirmation	6 C; 4 R
South Weymouth, Church of the Holy Nativity	5/3/2014	Cederholm	Deanery Confirmation	1 Confirmed at St. John's in Duxbury
South Yarmouth, St. David's Church	5/17/2014	Harris, G.	Confirmation	3 C
Southborough, St. Mark's Church	5/31/2014	Harris, G.	Confirmation	7 C
Stoughton, Trinity Church	5/31/2014	Harris, G.	Confirmation	4 C
Taunton, St. Mark's Church	5/31/2014	Harris, G.	Confirmation	1 C
Topsfield, Trinity Church	5/3/2014	Harris, G.	Confirmation	1 C
Vineyard Haven, Grace Church	5/17/2014	Harris, G.	Confirmation	3 C
Waban, Parish of the Good Shepherd	5/10/2014	Shaw	Deanery Confirmation	7C
Walpole, Epiphany Church	10/4/2014	Harris, G.	Deanery Confirmation	2 C; 1 R
Watertown, Church of the Good Shepherd	5/31/2014	Harris, G.	Confirmation	1 C
Wayland, Church of the Holy Spirit	5/31/2014	Harris, G.	Deanery Confirmation	2C
Wellesley, St. Andrew's Church	5/10/2014	Shaw	Deanery Confirmation	20C
Westford, St. Mark's Church	10/30/2014	Harris, G.	Institution	Suzanne Wade
Weston, St. Peter's Church	5/31/2014	Harris, G.	Confirmation	13 C
Whitman, All Saints' Church	5/3/2014	Cederholm	Deanery Confirmation	1 Received at St. John's in Duxbury
Winchester, Parish of the Epiphany	5/3/2014	Harris, G.	Confirmation	7 C; 1 R
Winthrop, St. John's Church	5/3/2014	Harris, G.	Deanery Confirmation	2 C; 2 R with Bp. Barbara Harris
Wrentham, Trinity Church	5/17/2014	Harris, G.	Confirmation	4 C

## Licensed Lay Readers and Lay Eucharistic Ministers

*Licensed as of Advent 2014. Based on Applications received as of April 23, 2015.*

*WL = Worship Leader; EM = Eucharistic Minister; EV = Eucharistic Visitor*

<b>Andover, Christ Church</b>			Greene, Robin	WL	EM
Bell, Dawn	EM		Gwynne, Peter	WL	EM
Blanchard, Elizabeth	EM		Hambly, Joy	WL	EM
Tabor, Nancy	EM		Hinkle, James	WL	EM
Wagner, Christopher	EM		Hutton, Peter	WL	
			Jones, Stephen		EM
<b>Arlington, St. John's</b>			Knauer, David	WL	EM
Foster, Jr., Frank	EM		Koch, Louise G.	WL	EM
Larson, Mary Jo	EM		Machnick, Todd	WL	
Manion, Laura	EM		Mankiewicz, Margaret	WL	
Seyon, Patrick	EM		Outwin, Kay	WL	EM
<b>Ayer, St. Andrew's</b>			Phelps, Judson		EM
Barringer, Nancy	EM	EV	Phillips, James		EM
Ferrillo, John	EM	EV	Ramage, Patrick	WL	
Geller, Isabel	EM		Rose, Edward	WL	
King, Andrea	EM		Shinn, Joyce		EM
McCawley, Elizabeth	EM		Stanley, Lenore	WL	EM
Nasworthy, Avery	EM		Stiefel, Charlotte L.		EM
Nasworthy, Kayden	EM		Tamash, Torrie		EM
Ott, John	EM		Thorn, Leslyn		EV
Quarles, Virginia		EV	Thorne, L. Leslyn		EV
Smith, Carolyn	EM		<b>Belmont, All Saints'</b>		
Unkel, Douglas	EM		Duddy, Gloria	WL	
<b>Barnstable, St. Mary's</b>			Lehman, Brad	WL	
Babcock, Donald	WL		Wong, Glenn	WL	
Booncock, Roger	WL		<b>Beverly, St. Peter's</b>		
Bresette, Allison	WL		Bochynski, Margaret		EM EV
Bresette, Matthew	WL	EM	Cabot, John		EM
Call, Ardith		EM	DeLollis, Marian		EM
Carlevale, Michael	WL		Farrar, David		EM EV
Cenzalli, Angela		EM	Lian, Nancy		EM
Cranitch, James	WL	EM	Monahan, Carrie		EM
Crocker, Amy		EM	Nelson, Joan		EM
Duniganatlee-Atlee, Aaron	WL	EM	Newman, John		EM EV
Edwards, Betsey	WL		Perrott, Godfrey		EM EV
Edwards, Richard	WL		Ryan, Donald		EM
Fales, Nancy	WL	EM	Walker, Deborah		EV
Gadkowski, Linda	WL		Weeks, Ann		EM
Gadkowski, Walter	WL		Woodbury, Connie		EM EV
Gagnon, Lois	WL		Young, John		EM
German, Ann	WL		<b>Beverly Farms, St. John's</b>		
Goodspeed, Susan	WL	EV	Karaman, Joseph		EM EV
Goodwin, Brad	WL		Malek, Joseph		EV
Gray, Roger	WL		Newberry, John	WL	EM EV
Greene, Hilary	WL	EM EV			

Randolph, Penelope			EV
Seamans, Eve			EV
Stone, Walter			EV
Vouwie, Curtis			EV
Zaval, Kelly			EV

**Billerica, St. Anne's**

Brewster, Kathy		EM	
Callihan, Dorothy		EM	
Desmarais, Ronald	WL	EM	
Dirk, Jeffrey		EM	
Geen, John	WL	EM	EV
Geen, Suzanne		EM	EV
Giroux, Edward		EM	
Giroux, Sandra		EM	
Hopkins, Cyndi		EM	EV
Jones, Elaine		EM	EV
Kennedy, Susan		EM	
Komarinski, Mark		EM	
Kusnierz, John		EM	
Mahoney, Jeffrey		EM	
Massey, Marguerite		EM	
Thibeault, Earl		EM	
Westerlund, Margaret		EM	EV

**Boston, Church of the Advent**

Blair, Lynda		EM	
Boyd, John		EM	
Braman, Robert		EM	
Brown, C. Thomas		EM	
Cleveland, Nathan		EM	
Corrieri, Richard V.		EM	
della Fera, BSG, Br. Ciaran Anthony		EM	
Fox, Melissa C.		EM	
Gurnon, Jack		EM	
Hardy, Steven		EM	
Hosford, Vance		EM	
Hunter, Elizabeth		EM	
Ieong, David		EM	
Lapin, David		EM	
Lewis, Jason		EM	
Litman, Eric		EM	
Madsen, Peter		EM	
Manka, Samuel		EM	
McDermott, Thomas		EM	
McNaughton, Melanie		EM	
Pierce, Virginia		EM	
Sampson, Stephen J.		EM	
Sheffer, Nola P.		EM	
Taylor, David		EM	
Ture, Julianne E.		EM	
Walden, Carolyn		EM	

**Boston, Christ Church (Old North)**

Brooksbank, Bruce			EM
Kinsel, Karen			EM
Stauff, Rosemary			EV
Williams, Katherine			EM

**Boston, St. Augustine's & St. Martin's**

Andrews, Eugene A.	WL	EM	EV
Beckford, Rosetta			EV
Brewington, Cynthia			EV
Briceno, Hazel	WL	EM	EV
Burgess, Archie	WL	EM	
Campbell, Adrienne			EV
Farrell, Juliet			EV
Farrell, Tonika	WL	EM	
Hoke, Roberta	WL	EM	EV
Kirnon, Ida	WL	EM	
Kirnon, Iva	WL	EM	
Ramos, Roberta			EV
Simon, Carole	WL	EM	EV
Taylor, Dexter			EM
Taylor, Joseph	WL	EM	
Watty, Vincent			EV

**Boston, Trinity Church**

Diver, Joan			EV
Walden, Virginia			EV

**Boston (Dorchester), All Saints'**

Beckvold, James			EM
Buckingham, William			EM
Gray, Nicholas			EM
Holmes, Brandon			EM
McLay, Bruce			EM
O'Hara, Geoffrey			EM

**Boston (Dorchester), St. Mary's**

Clark, Anderson			EM
Coye, Denzel			EM
Lewis, Stacia			EM

**Boston (Jam. Plain), St. John's**

Callendar-Wilsey, Jenna	WL	EM	
Callendar-Wilsey, Natasha	WL	EM	
Ellis, James	WL	EM	
Kozak, Paul	WL	EM	
McGorrill, Milton	WL	EM	EV
Nan-Winters, Kate	WL	EM	
Salimbene, Franklyn	WL	EM	
Schieffelin, Andrew	WL	EM	
Tesorero, Dawn	WL	EM	

**Boston (Roxbury), St. Cyprian's**

Austin, Cheryl	EM			Thiemann, Sarah	EM	EV
Nelson-Dilday, Judith	EM			Wilkerson, Margaret	EM	
Rewolinski, Edward	EM			Wing, Sharlene	EM	
Richards, Judith	EM			<b>Buzzards Bay, St. Peter's</b>		
<b>Boston (Roxbury), St. John and St. James</b>				Benting, Linda	EM	
Brooks, Norma	EM			Bilancieri, JoAnne	EM	
Fields, Lee	EM			Cain, Barbara		EV
Johnson, Vilma	EM			Lihzis, Kenneth	EM	
King, Bettye	EM			Smith, Virginia	EM	EV
Wallace, Jordana	EM			Taylor, Mark	EM	
Walters, David E.	EM			Willmott, Tim	EM	
<b>Boston (W. Roxbury), Emmanuel Church</b>				<b>Cambridge, St. James'</b>		
Bocage-Lemerise, Angela	EM	EV		Agard Lynch, Laverne	EM	
Gooley, John	WL	EM		Hixson, John	EM	
Halliday, Terri	WL	EM		King, Marian	WL	EM
Halpin-Evans, Gail	WL	EM	EV	Maynard, Eric	WL	EM
Kryczka, Susan	WL	EM		Millien, Didi	WL	EM
Lamb, Virginia	WL	EM	EV	Moore-Pollard, Mabel	EM	
<b>Brookline, All Saints'</b>				Pollard, Eustace	EM	
Bancroft, Fran			EV	Shumway, Anne	WL	EM
Calvert, Laurie			EV	Yoder, Mark	EM	EV
Hogan, Margaret			EV	<b>Cambridge, St. Peter's</b>		
Horner, Elinor Fairchild			EV	Davis, Rupert	EM	
Nutt-Powell, Thomas E.			EV	Denniston, Elaine		EV
Randall, Bonnie			EV	Duryee, Cynthia		EV
Ross, Jane			EV	Edmondson, Becky	EM	
<b>Brookline, St. Paul's</b>				Lindo, Alvin	EM	
Baugh, Lorraine	EM			McMullen, Gillian	EM	EV
Bruc, Andrea	EM			Scantlebury, Addison	EM	
Carter, Kenneth	EM			Scantlebury, Rashard	EM	
Estes-Smargiassi, Beverly	EM			Smith, Frank	EM	
Fauth, Bo	EM			Soones, Henry	EM	
Ferguson, John	EM	EV		Williams, Cheryl Lyn	EM	EV
Fried, Alan	EM			<b>Cohasset, St. Stephen's</b>		
Jacobson, Edward	EM	EV		Cook, Martha		EV
Knuth, Erika	EM			Eisenhauer, Caroline		EV
Kurkjian, Maryann	EM	EV		<b>Concord, Trinity Church</b>		
Lewis, Cricket	EM			Anderson, John		EV
Madden, Nancy	EM			Atherton, Charles	EM	EV
March, Amanda	EM			Barris, Elizabeth	EM	EV
Mitchell, Christine	EM			Barron, Tracy	EM	EV
Moses, Jean	EM			Birge, Walter W.	WL	EM
Munzer, Betsy	EM			Brynolfson, Gaylord	WL	EM
O'Brien, Keri	EM	EV		Burroughs, Carol	EM	EV
Powers, Edmund	EM			Ciancio, Suzette	EM	EV
Rugen, Leah	EM	EV		Daniel, Lee	EM	EV
Sanches, Linda	EM			Dickinson, Sharon	EM	EV
Smith, Georgia	EM			Lattimore, Gresh	WL	EM
Taylor, Madeleine	EM					EV



Lewis, John	EM	EV	Smith, Earnest J.	WL	EV	
Moss, Emily	EM	EV	Tyler, Lynda	WL	EM	EV
Newbold, Jennifer	EM	EV	<b>Edgartown, St. Andrew's</b>			
Powers, Jay	EM	EV	Anastacio, Paul	WL	EM	
Steward, Ernest	WL	EM	Dietz, Bonnie	WL	EM	
Stoessel, Deborah	EM	EV	Fenn, Marcia		EM	
Thorpe, Margaret	EM	EV	Kelly, Susan	WL	EM	EV
Turnquist, Jan	EM	EV	Scarpone, Michelle	WL	EM	
Vockel, Virginia	EM	EV	Slayton, Heather Anne			EV
<b>Danvers, All Saints/North Shore</b>			Taylor, Jo-Ann	WL	EM	EV
Biachi, Erika	WL	EM	Weibel, Susan	WL	EM	
Cloutman, Shirley	WL		White, Christine	WL	EM	EV
Coleman, Barbara	WL	EM	Wilson, Adam	WL	EM	
Coulson, Ginna	WL	EM	<b>Everett, Grace Church</b>			
Drivas, John	WL	EM	Akon, Athiang Lual		EM	
Gamble, Sally	WL		Arop, Teresa		EM	
Gettings, John	WL		Ayiik, James Garang	WL		
Gordon, Jim	WL		Ayuen, Deng	WL		
Gordon, Sally	WL		Bethou, Gabriel Dut	WL		
Hooper, William	WL		Bol, Mangok Mach	WL		
Lemiueux, Kat	WL		Choi, William Deng	WL		
Monagle, Linda	WL		Colas, Manio	WL		
Monagle, Linda	WL		Garang, Akol Deng	WL		
Murithi, Jeremiah	WL		Guot, Abiar Makor		EM	
Pelletier, Virginia	WL		Leek, Akuot Deng	WL		
Symmes, Bruce		EM	Machiek, Simon Chol	WL		
Witham, Henry		EM	Majok, James Magok	WL		
<b>Dedham, St. Paul's</b>			Manyok, David Mayen	WL		
Burt, Kenneth	WL	EM	Mayen, Elizabeth Nyibol	WL		
Harper-Nixon, Matt	WL	EM	Ruot, Mary Amou		EM	
Hodges, Emma	WL	EM	Yaak, Atem Aruei	WL		
Lamb, Magrit	WL	EM	<b>Foxboro, St. Mark's</b>			
MacKenzie, Ian	WL	EM	Decker, Robert	WL	EM	
Michelson, Peter	WL	EM	Dent, Patricia	WL	EM	EV
Palmer, Thomas	WL	EM	D'Onofrio, Louise	WL	EM	
Pearrow, Mark		EM	Dunnington, Cheryl	WL	EM	
Prentice, Julia	WL	EM	Erler, Rose	WL	EM	
Wood, Lisa	WL	EM	Esmond, Sandra	WL	EM	
Woodard, William	WL	EM	Evans, Susan	WL	EM	
<b>Easton (North), Bristol Trinity Episcopal</b>			Everson, Phyllis	WL	EM	
Barber, Laura		EM	Goodwin, John	WL	EM	EV
Berry, Wendy		EM	Hartwell, Judith	WL	EM	
Cole, Norma		EM	Penza, Patricia	WL	EM	
Hinds-Manick, Charlotte		EM	Pineault, Janet	WL	EM	
Phillips, Suzette	WL	EM	Schneider, Chris	WL	EM	
Rys, Claudia			Van Dell, John	WL	EM	
Savage, Sharon	WL	EM	<b>Framingham, St. Andrew's</b>			
Shearstone, Cynthia	WL	EM	Gay, Joan			EV
Silverman, Patricia	WL	EM				

**Franklin, St. John's**

Bishop, Patti	WL	EM
Griffith, Joseph		EM
Holland, Robin	WL	EM
Lobo, Sarah		EM
Lobo, Tory		EM
Lutz, Scott	WL	EM
Prear, Nicholas		EM
Prear, Sonya	WL	EM
Robinson, Allegra		EM
Robinson, Sydney		EM
Wrona, Joanna		EM

**Groveland, St. James'**

Anderson, Starr K.	WL	EM
Boyd, Jan	WL	EM
Harrison, James	WL	EM
Moorman, Regina		EM EV
Parker, Charlotte L.	WL	EM EV
Prescott, Mark		EM
Robinson, Cheryl		EM
Sanborn, Wayne		EM
Schacht, Rosemary		EM
Steer, Julia	WL	EM

**Hamilton & Wenham, Christ Church**

Aiken, Beckie		EM
Arning, Wesley		EM
Arthur, David		EM EV
Arthur, Katherine		EM EV
Bergquist, David		EM EV
Breed, Jamie		EM
Bukkegyi, Dan		EM
Carson-Lier, Andrew		EM
Carson-Lier, Sarah		EM
Chmura, Greg		EM
DeWeese-Boyd, Margie		EM
Dunning, Annalisa		EM
Dunning, George		EM
Foss, Pamela		EM
Friedrich, Sandy		EM
Gentry, Jeff		EM
Gentry, Kellie		EV
Herndon, Pam		EM
Hodge, Jackie		EM
Kerr, Carolyn		EM EV
Kerr, William		EV
Kinney, Donna		EM
MacQuarrie, Josh		EM
Maleno, Nancy		EM
McDonnell, Ryan		EM

McKernan, Chris		EM
Merrill, Joe		EM
Messier, Graham		EM
Miller, Natalie		EM
Parson, Steve		EM
Peabody, Lindsey		EM
Preston, Robert		EM
Ratichek, Sara		EV
Reif, Cheryl		EM
Reynolds, Jim		EM
Reynolds, Kali		EM
Smith, Liesl		EM
Spong, John		EM EV
Stockwell, Mark		EM
Sykes, Abby		EM
Sykes, Joshua		EM
Valadez, Joe		EM
Wilson, Kenneth		EM
Wilson, Laurie		EM
Wingate, Penny		EM EV

**Haverhill, Trinity Church**

Cerrato, Chris	WL	EM
Clark, Doris		EM
Estey, Cathy	WL	EM EV
Fowler, Gary		EM
Jacobs, Bette	WL	EM EV
King, Andrea		EM
King, Janet	WL	EM EV
Moulton, Michelle		EM
Truill, Frank		EM
Twombly, Kristine		EM

**Holbrook, St. John's**

Brown, Linda		EM EV
Jean-Philippe, Merlande		EM EV
Kasica, Jeffrey		EM EV
Rowe, Stephen		EM EV
Semeter, Karla		EV
Sullivan, John		EM EV
Sullivan, Susan		EM EV
Webb, Marilyn		EM EV
Wilbur, Eleanor		EM EV

**Holliston, St. Michael's**

Ahronian, Brian		EM
Ballenger, Grace		EM
Clark, Joan		EM EV
Daly, Helen		EM
Frye, Dana		EM
Giarla, Bob		EM
Girard, Karen		EM

Hodgman, Leslee	EM			Kalf, Cara	EM		
Koshy, Tom	EM			Kern, Frank	EM		
Malone, Nancy	EM	EV		Kern, Janet	EM		
May, Kathy	EM			King, Bob	WL	EM	
Weston, Pat	EM	EV		King, Mary Etta	EM		
<b>Hopkinton, St. Paul's</b>				Koso, Peter	EM		
Desilets, Jane	EM			Kukolich, Linda	EM	EV	
Donahue, Roxanne Vogal	WL	EM		Mirani, Kathleen	EM		
McGrath, John B.	EM	EV		Mockett, Kathy	EM		
Pries, Debra Swing	WL	EM		Murnaghan, Beth	EM		
Watt-aqir, Julie	WL	EM		Murnaghan, George	EM		
				Murnaghan, Mary Ucci	EM		
				Needham, Chris	EM		
<b>Hudson, St. Luke's</b>				Needham, Janet	EM		
Andresen, Erik	WL			Nokes, Mary	EM	EV	
Barnum, Roger	WL	EM		<b>Lincoln, St. Anne's</b>			
Bausch, Shirley	WL	EM	EV	Conroy, Tom	EM		
Carnes, William	WL	EM		Curtiss, Bob	EM		
Carr, Katherine	WL			Kitses, Mary	EM	EV	
Cochrane, Danielle	WL	EM	EV	Marsh, David	EM		
Cronis, Paul	WL	EM		Schuler, Gretchen	EM		
Elder, Connie	WL			Shively, Lisa	EM		
Hores, Michael	WL	EM		Stahl, Ben		EV	
King, Logan		EM	EV	Stahl, Shirley	EM	EV	
King, Mary Lee	WL	EM		Tetreault, Lois	EM		
King, Susie	WL	EM		<b>Lowell, St. Anne's</b>			
McGinnis, Sharon	WL			Quintero, Dolores		EV	
Miller, June	WL	EM	EV	<b>Marblehead, St. Andrew's</b>			
Orcheski, Gail			EV	Cassidy, Marsha	EM		
Piper, Keith	WL	EM	EV	Cooney, Shawn	EM		
Plasse, Gerard	WL	EM	EV	Davis, Cynthia	EM		
Saunders, Susan	WL	EM		Fowler, Alison	EM		
<b>Lexington, Our Redeemer</b>				Hornos, Marcela	EM		
Bowlby, Cassie		EM	EV	Howard, Peg Voss	EM		
Burns, Cathy		EM		Isbrandtsen, Diana	EM		
Burns, Steve		EM		Ives, Charles	EM		
Burnside, Jamie		EM		Johns, Edith Bross	EM		
Burnside, MaryAnne		EM		Mansfield, Jason	EM		
Chase, Lee Noel		EM		Nyren, Chuck	EM		
Conrad, Lance		EM		Phillips, Peter	EM		
Conrad, Sarah		EM		Pied, Georgette	EM		
Coons, Charlie		EM		Ramsden, Nancy	EM		
Coons, Elizabeth		EM		Rowe, Sterling	EM		
Emanuel, Susan		EM	EV	Shields, Alexandra Pineros	EM		
Faber, Andrea		EM		Silvius, Charles	EM		
Fortier, Bill		EM		Snell, Joy	EM		
Fox, Ian	WL	EM		Stratton, Penny	EM		
Frances, Julia	WL	EM	EV	Swanson, Kate	EM		
Hausslein, Evelyn	WL	EM	EV	Tener, Elizabeth	EM		
Hausslein, Tommy		EM					
Kalf, Alan		EM					

**Marion, St. Gabriel's**

Conway, Merry	WL		
Cowell, Cathy		EV	
Dubois, Josephine A	WL	EM	
Easterly, Harry	WL	EM	
Ford, Guppy	WL	EM	
Havel, Peter	WL	EM	
Helm, Bette	WL		
Henderson, Ron	WL	EM	
Hotte, Kate	WL		
Hotte, Russell	WL	EM	
Jeffrey, Andrew	WL	EM	
Jeffrey, Mary	WL	EM	
Jennings, Julia	WL		
Kennedy, Priscilla	WL	EM	
Kennedy, William	WL	EM	
Kleven, Judith	WL		
Lamson, Judy	WL	EM	
Leatham, Douglas		EM	
Leatham, Elizabeth		EM	
Lonsdale, Jane H.	WL	EM	EV
Manning, Karen	WL	EM	
McManus, Barbara	WL		
McManus, Gil	WL		
Meyer, Chris		EM	
Mock, George	WL		
Poyant, Richard	WL	EM	
Poyant, Susan	WL		
Race, Julie	WL		
Roberts, Cathy	WL		
Sanderson, Barbi	WL		EV
Sanderson, Bob	WL		EV
Titus, David	WL		
Titus, Suzy	WL		
Von Jess, Laura	WL		
Walden, Asher			EV
Webb, Anne	WL		
Webb, Dick	WL		

**Marshfield, Trinity Church**

Belmosto, Holly		EM	
Christman, Barbara			EV
Conner, David		EM	
Davidson, Timothy			EV
Dempsey, Robert		EM	
Farrell, Margaret		EM	
Fecteau, Bryan		EM	
Frugoli, Donna			EV
Frye, Marge			EV
Hahn, William		EM	
Howard, Marlene			EV

Kwiatkowski, Kim			EM
Meader, Tess			EV
Melvin, Jane			EM
Pereira, Jane			EM
Stewart, Virginia	WL	EM	EV
Uhler, Allen			EM

**Medford, Grace Church**

Benjamin, Maria			EM	EV
Brawley, Nathan			EM	
Brownsmith, Esther			EM	
Carson, Louis			EM	
Foote, Jr., Wes	WL	EM	EV	
Graham, Elizabeth			EM	
Hale, Dennis			EM	
Johnson, Genita			EM	
Joseph, Rochnet			EM	
Karpowich, Judith				EV
Muir, Mary				EV
Opara, Agnes			EM	
Pearson, Brenda			EM	EV
Pietrantoni, June			EM	
Ramirez, Warren			EM	EV
Rogers, Jr., John				EV
Scott, Lucinda			EM	
Sheets, Robin				EV
Smist, Margaret			EM	EV
Smith-King, Branwen			EM	
Woodward, Katherine			EM	EV

**Melrose, Trinity Church**

Bremberg, Charlene			EM	EV
Buice, Ed			EM	
Clark, Dixie			EM	
Fitzgerald, Barbara			EM	EV
Gauch, Sherron			EM	
Groulx, Patrick			EM	
Keefe, Florence	WL	EM	EV	
Kelley, Louise			EM	
Kukura, Philip	WL	EM		
Retalic, Marie			EM	EV
Sherman, Gail			EM	
Thompson, Michael	WL	EM		

**Methuen, St. Andrew's**

Beagan, James	WL	EM		
Brown, Beverly	WL	EM	EV	
McKeon, Matthew	WL	EM		
McLeod, Krista	WL	EM		
Walta, Laura	WL	EM		

**Milton, St. Michael's**

Agnew, Lana	WL			
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Almeida, Don	WL			Goss, Nigel		EM	
Almeida, Kathy	WL	EM		Hall, Beverly	WL	EM	EV
Amadi, Chukwuma	WL			Jones, Sara		EM	EV
Bray, Dina	WL			Knox-Johnston, Sandra		EM	
Butteriss, Margaret	WL	EM		MacNab, Malcolm		EM	
Campbell, Katherine	WL	EM		Maltby, Victoria		EM	
Cheney, Marilyn	WL	EM		Manske, Ethan		EM	
Conklin, Kenneth	WL	EM		Morley, Helen		EM	
Conklin, Sandra	WL	EM		Perleman, Sheri		EM	
Cotton, Martha	WL	EM		Robertson, Ian		EM	
Daiber, Ted	WL			Walker, William		EM	
Dillard, Ruth	WL	EM		Whelden, Elizabeth		EM	
Faulkner, Joan	WL	EM		Wight, Randall		EM	EV
Files, Amory	WL			<b>Natick, St. Paul's</b>			
Files, Kirby	WL			Belanger, Richard		EM	
Gifford, Brewster	WL	EM		Carr, Nathan		EM	
Herbert, Jamie	WL			Cox, Kristen		EM	
Iwunze, Nnenna	WL			Gaines, Valerie		EM	EV
Jackmauh, Richard	WL	EM		Hellmuth, Joan		EM	
James, Leslie	WL	EM		Inferrere, Gail		EM	EV
James, Norman	WL			Lamb, Mary Beth		EM	
Lachevre, Susan	WL	EM		Lee, Marilyn		EM	
Lloyd, Lucinda	WL			Lightcap, Eric		EM	
Long, Chris	WL			McKertich, Edla		EM	EV
Millington, Ann	WL			Montoya, Lisa			EV
Millington, Peter	WL			Phillips, Lyman		EM	
Monks, Sheila	WL			Schinzel, Ralph		EM	
Needham, Paul	WL			Stuckey, Sally		EM	EV
Phinney, Barb	WL			Westervelt, Cindy		EM	
Phinney, Ben	WL			Willsey, Mylinda		EM	
Rice, Judith	WL	EM					
Robinson, June	WL			<b>Needham, Christ Church</b>			
Rugo, Vicki	WL			Allen, Duncan	WL	EM	
Schmellick, Elizabeth	WL			Amsbary, Betsy		EM	EV
Scott, James	WL			Anderson, Myra	WL	EM	EV
Sholley, Adam	WL			Baker, Barbara	WL	EM	EV
Sibble, Mat	WL			Baker, Nardin	WL	EM	
Torney, Joan	WL	EM		Baker, Sally	WL	EM	EV
Wood, Anne	WL	EM		Beagan, Michael	WL		
<b>Nantucket, St. Paul's</b>				Beckerle, Paula	WL	EM	EV
Barnes, Curtis	WL	EM	EV	Begin, Robert	WL		
Bent, Rebecca		EM		Bell, Robert	WL		
Borneman, Cynthia		EM		Bergen, Phil	WL		
Borneman, Paul		EM		Brailey, Edwin	WL	EM	
Broughman, Alison		EM		Brown, Gwen		EM	
Broughman, Richard		EM		Brumit, Charolette	WL		
Casey, Mary	WL	EM	EV	Brumit, Scott	WL		
Esteban, Fernando	WL	EM	EV	Cross, John	WL		
Frale, Godfrey		EM		Dagdigan, Beatrice	WL	EM	EV
Fronzuto, Suzanne		EM	EV	Dale, Charles	WL		
				Davis, Charles		EM	

Dennett, Elizabeth L.	WL	EM	EV	Morgan, Mia		EM
Duvall, Jeannette		EM		Nieman, Patricia		EM
Ferrone, Charles		EM		Reed, William		EM
Fleming, Sue	WL			Roderiques, Pauline		EM EV
Gatto, Rich	WL	EM		Ryder, Charlene	WL	EM EV
Harris, Janet		EM		Spoor, David		EM
Huttenhower, Cecile	WL			St. Julien, Ashley		EM
Huttenhower, Curtis	WL			Steliga, Heather		EM
Jensen, Chris	WL			Swain, Joan		EV
Jensen, John	WL	EM		Sylvia, Brenda		EM EV
Kaiser, Don	WL			Sylvia, Elizabeth		EM
Morrison, Kenneth	WL	EM		Towers, Katherine		EM
Rubin, Tracy	WL	EM		Ukleja, Diana	WL	EM
Ryan, Mary Ann	WL	EM		Vincent, James		EM
Skypeck, Jim	WL			Vincent, Rachel		EM
Smith, Patty			EV	Weeden, Toni		EM
Sterling, Nancy	WL			Wilbour, William		EM
West, Allan			EV	<b>Newton, Grace Church</b>		
<b>New Bedford, Grace Church</b>				Savage-King, Ruthann		EV
Baker, Benjamin	WL	EM	EV	<b>Newton (Auburndale), Parish of the Messiah</b>		
Barnum, Danielle		EM		Bancroft, Martha		EM
Bedard, Douglas		EM		Copeland, Carol L.	WL	EM EV
Berry, Roberta		EM	EV	Jones, Bernie	WL	EM EV
Bortelho, Courtney		EM		Nelson, David	WL	EM
Bortelho, Melissa		EM		Young, Frederick	WL	EM
Boyce, Margaret		EM		<b>Newton (Chestnut Hill), The Redeemer</b>		
Boyce, Seaver		EM		Allen, Timothy		EM
Boyce, William		EM		Brooks, Zachary		EM
Buckles, Patricia			EV	Burnham, Philip		EM
Catelli-Vincent, Nina	WL	EM		Davis, Eliot Bostwick		EM
Choquette, Leo		EM	EV	Doran, Lucinda		EM
Clarke, Jean		EM	EV	Finley, Margo		EM
Collins, John		EM		Hearne, Sanders		EM
Croteau, Gerald	WL	EM		Jones, Christopher		EM
Decker, Allen	WL	EM		Mead, Letitia		EM
Doe, Caitlin		EM		Mills, Deborah		EM
Doe, Kimberly		EM		Murphy, Kathryn		EM
Doe, Michael		EM		Paolella, John		EM
Douhan, Zelinda			EV	Perry, Velura		EM EV
Gilfeather, Molly		EM		Reece, Brook		EM
Howcroft, John	WL	EM		Westcott, Suzanne	WL	EM EV
Jaikes, Daniel		EM		<b>Newton Centre, Trinity Church</b>		
Kelly, Louise			EV	Baynham, Thomas		EM
Knox, Judith			EV	Carter, Nick		EM
Laskey, Victoria		EM	EV	English, Donna		EV
Mello, Filomena		EM		Goldsmith, Mike	WL	EM
Montague, Damien		EM		Hilliard, Karen		EM
Monteiro, David		EM		Kohlmeier, Nathan		EM
Monteiro, Kenneth		EM		MacNair, David	WL	EM
Monteiro, Leslie		EM				

Miller, Kevin	WL			Johnson, Sara Arlene	WL	EM	EV
Nelson, Keith		EM		Saulnier, Rene	WL	EM	EV
Spileor, Robert	WL			Stanney, Gerald	WL	EM	EV
<b>Norwood, Grace Church</b>				Tempesta, Maureen		EM	EV
Bedard, Jacqueline	WL	EM		<b>Plymouth, Christ Church</b>			
Bravo, Manuel		EM	EV	Palombo, Priscilla			EV
Buchanan, John	WL	EM		Sykes, Cynthia	WL	EM	EV
Cannon, Sue		EM		Trowbridge, Donna		EM	EV
Hutchens, Lee		EM		Walters, Philemon	WL	EM	EV
Loescher, Peter	WL	EM	EV	<b>Quincy, St. Chrysostom's</b>			
Maloof, Carol		EM		Bowers, Kellie		EM	
Matthews, Brent		EM		Bowers, Thomas		EM	
Moher, Jim		EM		Clevenger, Dan		EM	
Morton, Deb			EV	Freeman, Marcia			EV
Noble, Catherine L.		EM	EV	Giberson, Myrna		EM	
Wilson, Elizabeth		EM		Good, Barbara		EM	
<b>Orleans, Holy Spirit</b>				Good, John		EM	
Armstrong, Martha			EV	Goossens, Eric		EM	
Beebe, Emily			EV	Hersey, Cliff	WL	EM	
Bragdon, Don			EV	Hutchinson, Harriet		EM	
Bragdon, Katherine			EV	Lynch, Pat		EM	
Calhoun, Celia		EM		McConnell, Eleanor		EM	
Cole, Ike			EV	McGillivray, Rebecca		EM	EV
Delano, Douglas		EM		McIntosh, Ahanni		EM	
Fry, Sara		EM	EV	O'Sullivan, Carol		EM	EV
Gentile, Jack		EM	EV	Parise, Karla		EM	
Gentile, Karen		EM	EV	Parker, Carrie		EM	
Goddard, Nat		EM		Springer-McIntosh, Marguerite		EM	
Hutchens, Bernie		EM		Stuver, Christy		EM	
Jones		EM		<b>Randolph, Trinity Church</b>			
Linton, Lori		EM	EV	Butz, Andrew		EM	
Marshall, Sandra		EM	EV	Gillis, Sandra		EM	
Mason, Edward		EM	EV	Hennessey, Diane		EM	
Merritt, Elizabeth			EV	Heywood, Pauline		EM	EV
Mines, Jody			EV	Kershaw, Richard	WL	EM	
Nixon, Jane			EV	Lutz, Donald		EM	EV
Nixon, John		EM		<b>Rockland, Trinity Church</b>			
O'Hara, Richard		EM	EV	Crockett, Daniel	WL	EM	
Paradise, Kate		EM	EV	Dunn, Marion	WL	EM	
Ridgeway, Brian			EV	Johnson, Susan	WL	EM	
Sasso, Jack		EM		Merriman, Ann	WL	EM	
Sasso, Susan		EM		Morse, Charles	WL	EM	
Smith, Dilys Jones		EM	EV	Morse, Charles	WL	EM	
Wieboldt, Cynthia		EM	EV	O'fuokwu, Emmanuel	WL	EM	
<b>Osterville, St. Peter's</b>				O'Neill, Judith	WL	EM	
Conroy, Harriet			EV	O'Neill, Thomas	WL	EM	
Duncan, Kathleen			EV	Whiting, George	WL	EM	
Dwyer, Carole		EM	EV	<b>Salem, Grace Church</b>			
Johnson, Eben Lennart	WL	EM	EV				

Allen, Stephen	WL			Goodwin, Gary	WL	EM	
Boisvert, Tony	WL			Graves, Linda	WL	EM	
Busteed, Anne	WL			Littlehale, Philip	WL		
Clark, Rebekah	WL			Phelps, Jean	WL	EM	
Cole, Gerry		EM		Powers, Linda	WL		
Crawford, Ethel	WL	EM		Senfleben, Christine	WL		
Hawkes, Babs	WL	EM		Simmons, Robert H.	WL	EM	
Lederhaus, Juli	WL	EM		St. Clair, Sandy	WL	EM	
Lederhaus, Walter		EM		Zahornasky, Paul	WL		
Lemons, Priscilla	WL	EM		<b>Somerset, Our Saviour</b>			
MacKay, Hugh	WL			Carpenter, Rose			EV
McHugh, Maureen		EM		MacLagan, Mark			EV
Moar, Joanne	WL	EM					
Nalipinski, Paige	WL	EM		<b>Somerville, St. James'</b>			
O'Ryan, David	WL	EM		Baxter, Paul	WL	EM	EV
Papps, Deborah	WL	EM	EV	Freeman, Moriah	WL	EM	EV
Papps, Jon	WL	EM	EV	Kimball, Charles	WL	EM	
Rhodes, Judy		EM		Olson, David		EM	
Small, Patricia	WL	EM	EV	Spencer, Sarah Faith	WL	EM	EV
Stonehouse, Jason	WL	EM		<b>Southboro, St. Mark's</b>			
Thompson, Jane		EM		Allen, Audrey		EM	
Valatka, Jacqueline	WL			Ayers, David		EM	
Wagner, Eric	WL			Baldwin, Laurin		EM	
Watson-Felt, Helen	WL	EM		Barnhart, Brian		EM	EV
<b>Salem, St. Peter's/San Pedro</b>				Barnhart, Leslie		EM	EV
Akin, Bruce	WL		EV	Barnhart, Susan		EM	EV
Alexander-Hurley, Barbara		EM		Bechtel, Cindy	WL	EM	
Amenu-Kpodo, Aku		EM		Cameron, Diane	WL	EM	
Barber, Debbie		EM		Coogan, Mary	WL	EM	EV
Bojos, Andres Martin		EM		Courtney, Judith		EM	EV
Brown, Nancy		EM		Drohan, Rick			EV
Calnen, Diane			EV	Dunn, Gabriela		EM	
Galeano, Alejandro		EM		Dunn, Kevin		EM	
Hill, Ruby		EM		Farrell, Andrea		EM	
LaVoie, Jinny	WL	EM	EV	Fitzpatrick, Andrea		EM	
McHugh, Robert		EM		Hamlin, Pam		EM	
Milman, Heidi		EM		Kane, Jerry		EM	
Reichert, Christine		EM		Leavitt, Donald M.	WL		EV
Robinson, Bruce	WL	EM	EV	Lesniewski, Jane		EM	
Simoneau, Bob		EM	EV	Marchessault, Dana		EM	
Sweet, Jim	WL	EM		Nelson, Rosemary			EV
<b>Sandwich, St. John's</b>				Nelson, Steven			EV
				Pearl, Carol		EM	
Greene, Janet		EM		Pearl, Sue		EM	
Thomas, James		EM		Reeder, Anita		EM	
<b>Saugus, St. John's</b>				Romine, Kristin		EM	
Aston, Julia	WL	EM		Tyner, Lorraine		EM	EV
Belyea, Stephen	WL	EM	EV	von Loewenfeldt, Marta		EM	
Chausse, Melissa	WL			Weiler, Mark		EM	EV
Felci, Paul	WL	EM		Zettek, Anne	WL		



**Southboro, Belmont Chapel, St. Mark's**

Hebert, Stephen WL EM

**Stoneham, All Saints'**

Alarcon, Michael EM

Collins, Allain WL

Conlon, Jeffrey EM

Conlon, Sandra WL

Dapkiewicz, Steve EM

Dickey, Kelly WL EM

Ditullio, Jeff WL

McIver, Elizabeth WL

Muir, Mary EV

Pepi, Vivien WL

Webber, Robert WL

**Stoughton, Trinity Church**

Amati, Ebe WL EM

Bunker, Robert WL EM

Cole, Mary WL EM

Dawkins, Adam WL EM

Martin, Nancy WL EM

Mullen, Debra WL EM

Newton, Norma WL EM

Walls, Martha WL EM EV

**Swampscott, Holy Name**

Chadwell, Brian EM

Evans, Lynne EM

Flannery, Bill EM

Gifford, Estelle EM

Hutchinson, Althea EM

Kieser, Kathlyn EM

Poppe, James EM

Rausted, Cheryl EM

Ronan, Michael EM

Smith, Huntley EM

Torrey, Robert WL EM EV

**Swansea, Christ Church**

Mulrooney, Judith EV

**Taunton, St. Thomas'**

Belenger, Linda WL EM

Capron, Frank WL EM

Cardoza, Ed WL EM

Hodge, Sonia WL EM EV

Holmes, Raquel WL EM

Kimball, Beverly WL EM

Largey, Marge WL EM

Leary, Avis WL EM

McNamee, Alex WL EM

Miller, Robin WL EM EV

Neugeboren, Brenda WL EM

Shearer, Monica WL EM

Stagliola, Michael WL EM

Teed, Norman WL EM

Walker, Len WL EM

Wargat, Mary WL EM EV

**Topsfield, Trinity Church**

Norcross, James EV

**Walpole, Epiphany**

Barrett, Jay WL EM

Barrett, Jo-Ann WL EM

Cormier, Andrew WL

Cormier, Devon WL

Cormier, Pam WL EM

Deppe, Jimmie Sue WL EM

Ford, George WL EM

Ford, Jean WL

Glebus, Elaine WL EM EV

Gotthardt, Emily WL EM

Groves, Charles WL EM

Groves, Jeffrey WL EM

Hee, Corwin WL EM

Helm, Tom WL EM

Hutchins, Shirley WL EM

Johnson, Carol WL EM EV

McHugh-Marden, Elaine WL

Najarian, Jean WL

Orwig, Tim WL EM

Power, Dick WL

Schneider, Emily WL EM

Schneider, Tom WL

Shea, Brian WL EM

Stockwell, Cindy WL

**Wareham, Good Shepherd**

Burgess, Philip WL EM

Ellis, Judy EM

Ellis, Rich EM

Facchetti, Sheryl EM

Funnell, Millie EM

Nyman, Jean EM

Pechey, Erica EM

Perron, Leslie EM

Walsh, Karen EM

Williams, Sandra EM

**Watertown, Good Shepherd**

Ahern, Patricia WL EV

Brown, Susan WL EM EV

Byrd, Karen EV

Daw, May WL

de Jong, Jean			EV	Davie, Leslie			EM
Donna, James	WL			Dunn, Meredith			EM
Hamilton, Olivia		EM	EV	Geers, Candice			EV
Lampert, Sandra		EM	EV	Geers, Timothy			EM
Schulte, Jean Ann			EV	Kelly, Ellen			EM
Steadman, Stephen	WL	EM	EV	Kingsley, Juanita			EM
West, Kelly		EM	EV	Kingsley, Victor			EM
Wyatt, Andrea	WL	EM	EV	Kozlowski, Lynne	WL		EM
<b>Wellesley, St. Andrew's</b>				Macdonald, Alan			EM
Blackman, Wade		EM		Nelson, Laura			EM
Blackwell, Margaret		EM		Onderdonk, Andrew			EM
Criswell, Paul		EM		Onderdonk, Jill			EV
Dent, Sarah		EM		Robrish, Linda			EM
Echlov, Nancy		EM		Russell, Joan Y.			EM
Hamilton, Joseph		EM		Spear, Betsy			EM
Hamlin, David		EM		Sugg, Emily			EM
Hamlin, Tucker		EM		Thomas, Ann			EM
Harper, Heidi		EM		Viti, Lynne			EM
Horobin, Joanna		EM		<b>Weymouth (South), Holy Nativity</b>			
Johnsen, Jeanne		EM		Asher, Terry	WL		EM
Johnson, Ann		EM		Blakely-Smith, Diana	WL		EM
Kell, Donna		EM		Clark, Betty	WL		EM
Kemp, Michael		EM		Diehl, Gail	WL		EM
Littlefield, Suzy		EM		Greene, John	WL		EM
Lorenz, Debbie		EM		Leamy, Judy	WL		EM
MacKinnon, Pat		EM		Lucier, Donna	WL		EM
Malin, Holly		EM		Mermet, Nancy	WL		EM
Peters, James		EM		Morgan, Kyle	WL		EM
Shackford, Paul		EM		Muller, Edwin	WL		EM
Staelin, Ellen			EV	Munise, Nancy	WL		EM
Tirrell, Lynne		EM		<b>Whitman, All Saints'</b>			
Topham, Charlie		EM		Baker, Emily			EM
Tuyschaevers, Joann		EM		Baker, Steve			EM
Zusky, Margaret		EM		Eunice, Patricia			EM
<b>Westford, St. Mark's</b>				Gurney, Regina			EM
Carlton, Jacqueline	WL	EM		Pye, Ann			EM
Culver, Martha		EM		Tingblad, Richard			EM
Donohue, Ellen		EM	EV	Wick, Herb			EM
Duran, Susan		EM		Wight, David			EM
Elliott, Herbert	WL	EM	EV	Wohlers, Chad			EM
Ellis, Thomas		EM		<b>Wilmington, St. Elizabeth's</b>			
Fletcher, Frances			EV	Bagayao, Richard	WL		EM
Hilton, Judie		EM		Cosman, Sarah	WL		EM
Kintner, Eric		EM		Cranford, Cheryl	WL		
Larson, Linda			EV	Curtis, Susan	WL		
Parsons, Robert		EM		DeLucia, Patti			EM
Pecora, Veronica		EM		Fardy, Lydia	WL		
Wolfendale, David		EM		Hogan, Janice			EM
<b>Westwood, St. John's</b>				Hull, Jeff	WL		EM

Kilburn, Tom	WL			Foglia, Christine		EM	
Pratti, Janice	WL	EM		Gustafson, Viking			EV
Sinclair, Melanie	WL			Long, Richard	WL	EM	
Stratouly, Cindy	WL			Riley, George	WL	EM	
Thompson, Robin	WL	EM		Robblee, Janice Flaherty		EM	
<b>Winchester, Epiphany</b>				Shea, Julie	WL	EM	
Almquist, Susan			EV	<b>Woburn, Trinity Church</b>			
Becker, Susan		EM		Cash, Jane	WL		
Becker, Susan			EV	Crane, Jennifer		EM	
Cass, Joy		EM	EV	Matthews, Nancy			EV
Cass, Leo			EV	Newman, Jill		EM	
Cronan, Kevin		EM		Poli, Karen		EM	
Devlin, Josephine W.		EM		Sheppard, Sandy	WL		
Dike, Laura		EM		Silvia, Frank			EV
Dry, Marion		EM		Slonicki, Ulla	WL		
Duggins-Warf, Hannah		EM		Wollosow, Paul			EV
Duggins-Warf, Micah		EM		<b>Yarmouth (South), St. David's</b>			
Goldhor, Richard S.		EM		Alden, Rebecca		EM	EV
Gosnell, Marie			EV	Blackwell, Donald	WL	EM	EV
Haskell, Susan J.		EM		Brewer, John		EM	
Hill, Allen			EV	Conner, Priscilla			EV
Johnson, Marie B.		EM		Corrigan, Marueen		EM	
Kellogg, Carol A.		EM		Frasier, Jacqueline		EM	
Kellogg, Samuel		EM		Freeman, Jean		EM	
Kinchen, Elizabeth		EM		Hansen, Katrina		EM	EV
Kinchen, Jason		EM		Johnson, Julia		EM	
Lee, Marie		EM		Mavorides, Sally		EM	
McGrane, Constance		EM		Monay, Eugene		EM	
Meadows, Chloe		EM		Monay, Jeanette		EM	
Minniti, Laurie		EM		Moyer, Nancy		EM	
Nazzaro, Joseph A.		EM		Parke, Beverly		EM	EV
Obbard, Diana			EV	Parke, Robert		EM	EV
Paradise, Jeanne		EM		Reid, Susan			EV
Pelosky, William		EM		Taylor, Arthur		EM	EV
Post, Sara			EV	Vigilano, Gary		EM	
Seferian, Cindy			EV	Ward, Robin		EM	
Sherwin, Jane		EM	EV	Winthrop, Bernice		EM	
Street, Mary		EM	EV				
Sullivan, Timothy		EM					
Taber, Alison			EV				
Treat, Jonathan		EM					
Valadez, Joseph		EM					
Vaughan, Gayle Pershouse		EM	EV				
Winterle, David		EM					
Wiseman, Margaret			EV				
<b>Winthrop, St. John's</b>							
Aguilo, Elizabeth			EM				
Bailey, Peg	WL	EM	EV				
Belcher, Carol	WL	EM					
Daloia, Janet		EM					

## Diocese of Massachusetts

## Vital Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2014

— BAPTISMS —

City	Congregation	Active Members	Communicants in Good Standing	Others Active	Average Sunday Attendance	Sunday Eucharists	16 yrs and Older	Under 16 Years	Confirmed or Received
Acton	The Church of the Good Shepherd	740	353	79	125	104	0	6	14
Amesbury	Episcopal Church of St James	180	177	0	58	89	0	5	0
Andover	Parish of Christ Church	1,043	737	28	188	104	0	19	0
Arlington	Church of Our Saviour	81	75	77	49	65	0	5	0
Arlington	St Johns Church	115	115	0	44	92	0	1	1
Attleboro	All Saints Episcopal Church	67	59	0	33	0	1	2	4
Ayer	St Andrews Episcopal Church	232	208	0	74	94	2	3	5
Barnstable	St Marys Episcopal Church	594	594	67	212	170	0	6	0
Bedford	St Pauls Episcopal Church	407	380	2	118	55	1	9	6
Belmont	All Saints Episcopal Church	151	101	18	69	89	0	1	5
Beverly	St Peters Episcopal Church	242	197	11	78	102	0	4	0
Beverly Farms	St Johns Church	1,529	1,321	0	177	104	1	23	16
Boston	Emmanuel Episcopal Church	337	337	0	132	56	1	9	1
Boston	Old North Christ Church	273	125	25	126	98	0	20	1
Boston	St Augustine and St Martin	108	108	0	42	53	0	0	0
Boston	St Stephen Episcopal Church	238	189	0	87	55	0	9	2
Boston	The Church of the Advent	814	771	13	250	154	3	6	5
Boston	Trinity Church Episcopal	2,641	600	3,721	888	166	3	34	41
Braintree	Emmanuel Episcopal Church	213	213	0	65	0	2	6	0
Bridgewater	Trinity Episcopal Church	279	249	0	79	84	0	10	2
Brookline	All Saints Parish	457	380	0	169	103	0	0	2
Brookline	Church of Our Saviour	388	120	90	78	0	0	3	0
Brookline	St Pauls Episcopal Church	463	463	0	181	102	3	7	9
Burlington	St Marks Episcopal Church	267	267	0	50	51	0	4	6
Buzzards Bay	Church of St Peters on the Canal	349	105	25	100	101	1	5	1
Cambridge	Christ Episcopal Church	1,119	886	233	212	132	2	7	5
Cambridge	St Bartholomews Episcopal Church (2012)	177	162	1	83	96	0	5	0
Cambridge	St James Episcopal Church	682	438	10	141	96	0	6	5
CAMBRIDGE	St Peters Episcopal Church (2013)	155	155	14	70	2	0	3	6
Canton	Trinity Church Episcopal (2013)	181	103	2	36	102	1	2	0
Charlestown	St Johns Episcopal Church	107	97	30	73	102	1	9	6
Chatham	St Christophers Church	816	650	0	190	138	0	13	0
Chelmsford	All Saints Church	689	650	10	164	115	1	3	5
Chelsea	St Lukes/San Lucas Episcopal Church	155	140	50	92	137	0	3	2

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— BAPTISMS —

City	Congregation	Active Members	Communicants in Good Standing	Others Active	Average Sunday Attendance	Sunday Eucharists	16 yrs and Older	Under 16 Years	Confirmed or Received
Chestnut Hill	Church of the Redeemer	1,109	1,109	0	158	81	0	8	14
Cohasset	St Stephens Episcopal Church	778	220	0	100	104	0	17	5
Concord	Trinity Episcopal Church	1,340	796	0	208	107	1	7	6
Danvers	All Saints Episcopal Church of the North Shore	242	221	2	106	101	0	5	6
Dartmouth	St Peters Episcopal Church	45	45	0	21	53	0	1	0
Dedham	Church of the Good Shepherd	89	81	0	36	54	2	4	0
Dedham	St Pauls Church Episcopal	476	277	10	129	75	0	15	0
Dorchester	Parish of All Saints	365	320	0	120	105	0	4	0
Dorchester	St Marks Episcopal Church	127	127	0	75	57	0	5	0
Dorchester	St Mary Episcopal Church	111	97	3	60	51	0	1	0
Dover	St Dunstons Episcopal Church	348	348	20	69	52	0	2	10
Duxbury	Parish of St John the Evangelist	1,064	1,064	0	135	87	0	9	16
East Boston	Grace Federated Church (2013)	8	8	0	13	13	3	0	0
Edgartown	St Andrews Episcopal Church	116	116	0	77	106	2	4	0
Everett	Grace Episcopal Church	232	232	17	30	200	6	0	16
Fall River	Church of the Holy Spirit	183	140	0	81	8	0	18	5
Fall River	St Lukes Episcopal Church	86	44	51	35	50	0	2	0
Falmouth	St Barnabas Memorial Church	805	440	124	213	102	0	15	0
Foxborough	St Marks Episcopal Church	220	220	9	75	94	0	3	0
Framingham	St Andrews Episcopal Church	556	0	0	106	101	0	3	9
Franklin	St Johns Episcopal Church	376	376	0	87	53	0	5	8
Gloucester	St Johns Episcopal Church	440	235	50	71	93	0	4	0
Groveland	St James Episcopal Church	244	180	60	68	47	0	0	5
Hanover	St Andrews Episcopal Church	540	370	0	107	96	0	8	8
Harwich Port	Christ Episcopal Church	290	170	12	96	104	0	2	0
Haverhill	Trinity Episcopal Church	126	109	8	42	55	0	2	0
Hingham	Parish of St John the Evangelist	1,388	1,258	0	204	144	0	22	16
Holbrook	St Johns Episcopal Church	44	44	0	36	74	0	2	1
Holliston	St Michaels Church	276	220	0	89	91	0	1	0
Hopkinton	St Pauls Church Episcopal	58	28	0	28	50	0	2	0
Hudson	St Lukes Episcopal Church	203	180	0	37	49	0	6	2
Hyde Park	Iglesia de San Juan	40	40	10	30	1	0	1	0
Hyde Park	Parish of Christ Church	182	0	5	54	54	0	3	0
Ipswich	Ascension Memorial Church	402	402	0	121	110	0	4	9

## Diocese of Massachusetts

## Vital Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2014

— BAPTISMS —

City	Congregation	Active Members	Communicants in Good Standing	Others Active	Average Sunday Attendance	Sunday Eucharists	16 yrs and Older	Under 16 Years	Confirmed or Received
Jamaica Plain	St Johns Episcopal Church	216	165	4	54	54	0	2	0
Lawrence	Grace Episcopal Church	285	180	0	137	154	0	5	0
Lexington	Church of Our Redeemer	430	249	3	120	103	0	3	5
Lincoln	St Annes in the Fields Church	705	487	0	149	97	0	2	3
Lowell	St Annes Episcopal Church	283	220	0	86	145	1	7	2
Lowell	St Johns Episcopal Church	79	65	0	33	48	0	0	1
Lynn	St Stephens Memorial Church	375	320	70	185	129	0	12	6
Lynnfield	St Pauls Episcopal Church	321	321	0	89	95	0	5	13
Malden	St Pauls Church	114	66	7	51	53	0	2	0
Marblehead	St Michaels Church Episcopal	270	237	10	110	91	0	6	6
Marblehead	Wyman Memorial Church of St Andrew	406	260	12	93	96	0	4	0
Marion	St Gabriels Episcopal Church	544	541	39	139	105	1	6	1
Marshfield	Trinity Episcopal Church	191	177	20	56	87	0	2	8
Mattapan	Church of the Holy Spirit (2011)	511	285	0	230	104	0	2	0
Medfield	Church of the Advent	258	241	0	77	94	1	5	3
Medford	Grace Episcopal Church	442	442	0	153	136	0	18	0
Medway	Christ Church	175	80	60	36	52	0	0	0
Melrose	Trinity Episcopal Church	151	149	0	69	86	0	2	0
Methuen	St Andrews Church	245	114	21	46	50	0	3	0
Middleborough	Church of Our Saviour Episcopal (2013)	262	172	6	66	111	0	9	1
Milton	Episcopal Church of Our Saviour	51	51	0	19	44	0	0	1
Milton	St Michaels Church	702	575	0	106	88	0	13	14
Nantucket	St Pauls Episcopal Church	506	506	0	136	61	0	9	0
Natick	St Pauls Episcopal Church (2013)	621	554	23	214	115	1	7	11
Needham	Christ Church Episcopal	809	730	0	153	93	0	11	9
New Bedford	Grace Church Episcopal	498	374	23	224	156	0	6	13
New Bedford	St Andrews Church	295	102	10	47	0	0	4	0
New Bedford	St Martins Episcopal Church (2013)	122	124	0	53	52	6	4	0
Newburyport	St Pauls Episcopal Church	434	279	0	112	86	5	2	5
Newton	Grace Episcopal Church	372	372	0	93	104	0	4	4
Newton Centre	Trinity Parish of Newton Centre	66	56	6	46	47	0	0	2
Newton Highlands	St Pauls Episcopal Church	181	176	5	67	84	0	5	5
Newton Lower Falls	St Marys Episcopal Church	406	351	0	100	96	0	5	0
Newtonville	St Johns Episcopal Church	108	68	10	45	91	1	2	2

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— BAPTISMS —

City	Congregation	Active Members	Communicants in Good Standing	Others Active	Average Sunday Attendance	Sunday Eucharists	16 yrs and Older	Under 16 Years	Confirmed or Received
North Andover	St Pauls Episcopal Church (2012)	296	250	86	71	71	0	7	6
North Attleboro	Grace Episcopal Church-N Attleboro	209	192	0	57	104	0	10	0
North Billerica	St Annes Episcopal Church	357	300	9	78	0	1	2	0
North Easton	Bristol Trinity Episcopal Church	0			0				0
Norwood	Grace Episcopal Church	239	239	4	57	90	0	3	0
Oak Bluffs	Trinity Episcopal Church	0	0	0	47	13	0	0	0
Orleans	The Church of the Holy Spirit	580	479	6	215	157	6	0	0
Osterville	St Peters Church Episcopal	388	309	50	90	112	0	3	0
Plymouth	Christ Church Parish	735	298	31	177	147	0	16	1
Provincetown	St Mary of the Harbor	164	149	49	71	62	0	0	0
Quincy	Christ Church	150	150	0	76	50	4	0	1
Quincy	The Parish of St Chrysostoms	141	98	11	74	50	0	5	0
Randolph	Trinity Church	190	154	0	58	93	0	4	0
Reading	Church of the Good Shepherd	392	290	0	81	88	0	8	0
Rockland	Trinity Episcopal Church	115	109	1	58	103	0	3	0
Rockport	St Marys Episcopal Church	282	251	20	122	114	0	1	0
Roxbury	St Cyprians Episcopal Church (2013)	213	213	0	58	58	0	2	7
Roxbury	St Johns St James Church	88	80	0	47	52	0	0	0
Salem	Grace Episcopal Church	551	491	22	75	104	0	6	4
Salem	St Peters Episcopal Church	350	157	16	74	153	0	1	4
Sandwich	St Johns Episcopal Church	1,045	0	0	129	0	1	9	0
Saugus	St Johns Episcopal Church	292	140	0	70	101	0	2	0
Scituate	St Lukes Episcopal Church Scituate	503	321	45	125	104	0	8	8
Sharon	St Johns Church	34	34	0	14	72	0	0	0
Shirley	Trinity Chapel	136	60	8	28	0	0	0	0
Somerset	Church of Our Saviour	486	400	40	130	104	0	0	14
Somerville	St James Episcopal Church	73	73	0	29	52	0	1	0
South Hamilton	Christ Church	328	315	38	198	142	0	7	0
South Weymouth	Church of the Holy Nativity	563	563	1	106	0	0	5	1
South Yarmouth	St Davids Church	249	190	15	135	99	0	4	0
Southborough	St Marks Church	521	375	40	134	139	0	12	7
Stoughton	Trinity Episcopal Church	110	100	0	33	64	0	5	3
Sudbury	St Elizabeths Episcopal Church	415	406	0	127	106	0	6	0
Swampscott	The Church of the Holy Name	116	116	1	65	92	0	3	0

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— BAPTISMS —

City	Congregation	Active Members	Communicants in Good Standing	Others Active	Average Sunday Attendance	Sunday Eucharists	16 yrs and Older	Under 16 Years	Confirmed or Received
Swansea	Christ Episcopal Church	254	178	0	66	91	1	8	0
Taunton	Episcopal Church of St Thomas	196	189	5	120	156	0	12	6
Topsfield	Trinity Episcopal Church	594	414	14	90	110	0	5	0
Vineyard Haven	Grace Episcopal Church	134	132	10	130	108	0	3	3
Waban	Church of the Good Shepherd	326	306	20	114	93	0	8	7
Wakefield	Emmanuel Episcopal Church	243	182	2	74	91	0	2	0
Walpole	Epiphany Episcopal Church	497	212	12	92	114	0	11	3
Waltham	Christ Church Parish	364	258	0	158	108	1	9	0
Wareham	Church of the Good Shepherd	270	208	23	81	100	0	6	0
Watertown	Church of the Good Shepherd	160	117	15	55	53	1	3	1
Wellesley	St Andrews Episcopal Church	2,352	1,497	1,816	252	134	1	13	20
Wellfleet	Chapel of St James the Fisherman	0	0	0	64	29	0	0	0
West Newbury	All Saints Episcopal Church	85	0	0	28	56	0	1	0
West Roxbury	Parish of Emmanuel Church	61	53	3	25	50	0	1	3
Westford	St Marks Episcopal Church	312	158	0	53	47	0	2	0
Weston	St Peters Church Episcopal	571	417	0	90	112	0	6	7
Westwood	St Johns Episcopal Church	300	270	30	66	105	0	6	0
Whitman	All Saints Parish	118	118	2	42	98	0	3	1
Wilmington	St Elizabeths Episcopal Church	154	146	8	35	0	0	2	0
Winchester	Parish of the Epiphany	1,048	792	0	264	107	0	24	8
Winthrop	St Johns Episcopal Church	135	130	0	68	140	0	7	4
Woburn	Trinity Episcopal Church	177	165	10	35	112	0	3	0
Woods Hole	Church of the Messiah Epis Church	245	228	17	76	96	1	5	0
Wrentham	Trinity Episcopal Church	283	283	0	60	68	0	7	5
Total		59,822	43,886	7,696	15,891	13,514	70	880	525



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## Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2014

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Acton	The Church of the Good Shepherd	334,342	367,399	389,258	358,649	55,622	12,261	377,899
Amesbury	Episcopal Church of St James	124,146	126,143	130,022	110,476	12,189	6,720	115,885
Andover	Parish of Christ Church	643,018	705,974	824,986	646,642	73,796	138,670	770,161
Arlington	Church of Our Saviour	151,417	154,159	171,587	149,615	10,380	1,900	152,495
Arlington	St Johns Church	117,145	194,518	283,354	208,226	21,666	39,045	249,471
Attleboro	All Saints Episcopal Church	52,209	105,046	124,271	90,938	3,818	23,621	114,159
Ayer	St Andrews Episcopal Church	154,435	167,435	167,435	173,081	14,290	39,947	204,210
Barnstable	St Marys Episcopal Church	371,115	698,330	757,977	634,914	60,493	93,966	729,819
Bedford	St Pauls Episcopal Church	179,425	222,093	350,269	212,762	19,551	73,892	301,331
Belmont	All Saints Episcopal Church	216,289	244,640	305,705	247,943	22,006	38,488	281,621
Beverly	St Peters Episcopal Church	160,160	260,419	265,980	271,614	33,266	7,391	280,322
Beverly Farms	St Johns Church	557,380	644,995	1,158,586	567,461	67,915	6,337	599,541
Boston	Emmanuel Episcopal Church	297,757	563,937	1,020,735	536,264	36,263	533,583	850,200
Boston	Old North Christ Church	147,253	436,403	442,520	436,250	15,000	6,224	436,500
Boston	St Augustine and St Martin	81,925	142,881	147,100	129,126	7,864	12,379	141,729
Boston	St Stephen Episcopal Church	91,412	107,169	1,629,761	55,128	794	1,177,585	1,232,713
Boston	The Church of the Advent	497,103	1,239,267	1,865,812	993,165	142,839	343,043	1,316,208
Boston	Trinity Church Episcopal	3,243,964	3,373,979	7,930,640	3,211,666	402,450	4,620,282	7,710,637
Braintree	Emmanuel Episcopal Church	76,094	116,975	117,260	18,664	2,500	11,435	29,111
Bridgewater	Trinity Episcopal Church	90,582	109,634	144,060	103,225	8,217	17,228	119,053
Brookline	All Saints Parish	371,424	565,226	928,657	546,548	54,580	1,386,410	1,834,014
Brookline	Church of Our Saviour	211,152	342,062	470,255	341,851	43,774	24,959	353,992
Brookline	St Pauls Episcopal Church	254,219	444,939	635,726	400,765	36,328	91,512	604,976
Burlington	St Marks Episcopal Church	80,815	114,548	114,548	109,468	11,746	57,530	158,968
Buzzards Bay	Church of St Peters on the Canal	96,729	160,360	190,574	141,183	11,681	30,251	170,434
Cambridge	Christ Episcopal Church	587,266	924,737	1,074,597	929,011	97,200	105,815	979,546
Cambridge	St Bartholomews Episcopal Church (2012)	150,118	157,910	167,910	184,679	14,533	11,977	190,239
Cambridge	St James Episcopal Church	247,503	383,111	487,098	473,520	49,247	36,686	479,693
CAMBRIDGE	St Peters Episcopal Church (2013)	147,554	288,182	399,415	286,050	34,283	69,152	354,949

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Canton	Trinity Church Episcopal (2013)	18,670	200,078	200,078	169,310	15,384	1,425	169,310
Charlestown	St Johns Episcopal Church	127,716	202,948	217,964	202,100	19,127	131,360	333,460
Chatham	St Christophers Church	519,768	664,318	1,883,652	645,867	72,869	159,808	815,488
Chelmsford	All Saints Church	295,113	321,037	332,176	318,897	34,522	24,009	344,006
Chelsea	St Lukes/San Lucas Episcopal Church	36,789	161,462	177,985	161,964	3,569	14,071	175,835
Chestnut Hill	Church of the Redeemer	751,829	1,023,346	1,128,652	886,487	0	49,625	1,056,807
Cohasset	St Stephens Episcopal Church	379,519	445,612	458,555	396,640	48,881	45,351	426,477
Concord	Trinity Episcopal Church	771,535	805,268	1,911,981	755,157	96,825	238,952	1,004,031
Danvers	All Saints Episcopal Church of the North Shore	132,105	184,519	299,037	190,449	13,032	162,548	354,096
Dartmouth	St Peters Episcopal Church	21,721	49,256	77,482	55,851	2,360	7,490	62,930
Dedham	Church of the Good Shepherd	70,685	92,658	97,247	98,242	7,020	2,926	102,831
Dedham	St Pauls Church Episcopal	294,652	382,974	478,070	376,182	42,818	84,224	468,679
Dorchester	Parish of All Saints	224,627	397,490	8,448,846	408,961	40,127	6,417,934	6,828,395
Dorchester	St Marks Episcopal Church	111,613	130,574	131,667	145,568	8,986	8,143	154,017
Dorchester	St Mary Episcopal Church	2,770	114,460	114,460	151,165	5,735	8,000	160,165
Dover	St Dunstans Episcopal Church	299,414	299,414	378,053	314,681	35,670	50,045	364,089
Duxbury	Parish of St John the Evangelist	350,231	392,378	595,197	350,880	45,755	146,229	493,847
East Boston	Grace Federated Church (2013)	2,750	2,750	2,750	0	0	0	0
Edgartown	St Andrews Episcopal Church	206,958	354,928	381,396	312,529	36,074	26,172	330,260
Everett	Grace Episcopal Church	65,534	116,506	157,506	117,843	7,443	29,546	146,604
Fall River	Church of the Holy Spirit	51,005	289,142	289,142	241,952	27,000	55,707	297,659
Fall River	St Lukes Episcopal Church	22,736	48,347	54,828	40,394	500	11,666	48,564
Falmouth	St Barnabas Memorial Church	287,097	534,590	768,839	566,412	65,433	169,340	804,957
Foxborough	St Marks Episcopal Church	157,345	170,585	176,681	168,828	12,306	200	168,828
Framingham	St Andrews Episcopal Church	205,978	269,625	269,625	298,540	32,918	3,153	298,540
Franklin	St Johns Episcopal Church	96,784	124,520	124,593	114,374	9,915	2,192	114,374
Gloucester	St Johns Episcopal Church	153,554	257,985	280,396	258,298	25,427	29,009	280,396
Groveland	St James Episcopal Church	107,030	155,979	156,159	144,372	13,931	12,365	152,026

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Hanover	St Andrews Episcopal Church	134,312	217,798	282,803	212,388	25,927	55,944	235,413
Harwich Port	Christ Episcopal Church	147,535	327,133	328,133	323,383	36,772	8,917	327,658
Haverhill	Trinity Episcopal Church	40,869	247,917	281,101	247,917	27,599	66,960	273,963
Hingham	Parish of St John the Evangelist	449,589	606,094	668,686	602,833	71,348	107,453	690,350
Holbrook	St Johns Episcopal Church	21,068	93,470	203,613	90,538	6,263	36,556	128,149
Holliston	St Michaels Church	137,973	170,577	227,188	170,793	19,468	17,000	194,293
Hopkinton	St Pauls Church Episcopal	2,763	25,627	35,831	99,333	6,921	8,355	107,688
Hudson	St Lukes Episcopal Church	61,417	81,907	97,080	62,333	4,676	5,173	67,789
Hyde Park	Iglesia de San Juan	7,928	52,314	57,314	44,000	0	17,143	61,143
Hyde Park	Parish of Christ Church	42,502	109,885	181,577	152,281	34,075	146,752	300,998
Ipswich	Ascension Memorial Church	228,864	319,053	331,806	266,466	27,115	17,567	293,067
Jamaica Plain	St Johns Episcopal Church	122,157	194,626	285,126	192,621	21,942	131,617	322,407
Lawrence	Grace Episcopal Church	49,249	261,737	295,957	244,300	20,889	51,644	295,957
Lexington	Church of Our Redeemer	352,011	490,037	849,266	458,588	46,115	171,285	625,600
Lincoln	St Annes in the Fields Church	521,730	555,100	670,465	651,016	80,015	28,516	667,556
Lowell	St Annes Episcopal Church	54,064	355,827	355,827	250,568	48,620	66,365	303,203
Lowell	St Johns Episcopal Church	37,133	52,689	553,720	51,613	2,793	5,677	57,460
Lynn	St Stephens Memorial Church	143,675	425,252	833,149	440,540	36,563	148,576	556,431
Lynnfield	St Pauls Episcopal Church	179,265	239,830	569,830	224,193	21,266	9,504	228,693
Malden	St Pauls Church	71,497	169,336	169,336	159,828	10,962	25,648	160,328
Marblehead	St Michaels Church Episcopal	230,498	340,884	586,829	351,393	38,660	709,778	1,080,346
Marblehead	Wyman Memorial Church of St Andrew	245,569	341,995	343,056	363,005	43,734	55,092	396,636
Marion	St Gabriels Episcopal Church	379,273	424,498	603,133	478,455	47,292	25,500	510,248
Marshfield	Trinity Episcopal Church	105,761	214,382	215,732	206,743	17,565	12,637	218,380
Mattapan	Church of the Holy Spirit (2011)	267,506	267,506	267,506	0	0	0	0
Medfield	Church of the Advent	177,310	238,411	289,512	233,738	21,809	49,348	282,836
Medford	Grace Episcopal Church	210,722	351,726	478,761	356,694	37,126	116,887	466,088
Medway	Christ Church	47,839	63,247	112,069	55,934	5,900	50,015	105,360
Melrose	Trinity Episcopal Church	125,217	264,860	264,860	243,992	24,539	24,284	263,392

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Methuen	St Andrews Church	58,318	61,533	72,220	79,363	2,617	18,080	93,963
Middleborough	Church of Our Saviour Episcopal (2013)	105,359	164,217	262,142	206,516	28,788	36,166	249,744
Milton	Episcopal Church of Our Saviour	29,910	159,770	159,770	149,979	11,912	18,331	159,634
Milton	St Michaels Church	430,725	550,786	559,656	557,016	66,522	20,744	559,656
Nantucket	St Pauls Episcopal Church	363,121	541,978	1,487,825	531,312	58,206	1,844,079	2,377,424
Natick	St Pauls Episcopal Church (2013)	396,984	503,003	732,297	474,139	51,000	78,474	600,212
Needham	Christ Church Episcopal	427,419	580,527	710,329	578,594	69,181	74,995	636,704
New Bedford	Grace Church Episcopal	292,224	646,106	724,712	584,424	76,525	84,599	661,564
New Bedford	St Andrews Church	48,460	130,491	168,520	99,415	3,766	159,293	234,493
New Bedford	St Martins Episcopal Church (2013)	53,278	92,171	93,856	80,037	7,268	1,350	80,347
Newburyport	St Pauls Episcopal Church	282,405	344,389	444,297	349,968	37,661	18,760	364,548
Newton	Grace Episcopal Church	196,367	380,641	388,307	380,641	40,936	17,089	389,757
Newton Centre	Trinity Parish of Newton Centre	116,180	327,283	359,218	337,850	34,887	94,679	411,370
Newton Highlands	St Pauls Episcopal Church	169,083	217,711	226,319	225,712	23,713	4,397	232,134
Newton Lower Falls	St Marys Episcopal Church	293,725	445,868	625,099	415,883	46,367	282,054	697,483
Newtonville	St Johns Episcopal Church	97,146	158,248	160,669	154,832	13,148	9,116	164,977
North Andover	St Pauls Episcopal Church (2012)	149,430	213,723	227,650	224,471	26,864	25,849	256,212
North Attleboro	Grace Episcopal Church-N Attleboro	154,636	323,020	334,005	302,359	146,037	0	302,359
North Billerica	St Annes Episcopal Church	110,175	212,997	212,997	208,676	21,981	0	208,726
North Easton	Bristol Trinity Episcopal Church		0	0	0		0	0
Norwood	Grace Episcopal Church	86,301	133,614	197,743	129,606	10,020	51,521	181,582
Oak Bluffs	Trinity Episcopal Church	28,983	36,146	36,146	18,750	0	13,999	25,824
Orleans	The Church of the Holy Spirit	421,955	628,092	757,362	636,671	66,041	102,244	722,155
Osterville	St Peters Church Episcopal	252,602	383,618	437,022	366,486	28,166	73,065	461,198
Plymouth	Christ Church Parish	235,159	361,999	383,199	374,112	39,521	43,856	410,284
Provincetown	St Mary of the Harbor	142,066	170,452	349,659	209,970	19,632	99,289	308,585
Quincy	Christ Church	76,281	202,985	264,092	184,262	18,836	87,964	266,032
Quincy	The Parish of St Chrysostoms	117,571	189,815	282,917	189,815	18,701	73,201	258,337
Randolph	Trinity Church	61,740	79,029	105,829	99,190	8,608	0	99,190

## Diocese of Massachusetts

## Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2014

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Reading	Church of the Good Shepherd	143,127	178,157	304,170	187,815	19,707	92,062	291,877
Rockland	Trinity Episcopal Church	89,792	96,843	99,426	86,709	4,434	4,450	92,165
Rockport	St Marys Episcopal Church	164,689	164,889	176,324	158,938	2,000	2,995	169,463
Roxbury	St Cyprians Episcopal Church (2013)	129,199	184,509	187,030	224,753	13,400	0	224,753
Roxbury	St Johns St James Church	19,471	125,673	125,673	124,583	3,500	4,607	127,590
Salem	Grace Episcopal Church	134,223	181,320	258,957	181,320	20,000	30,135	197,120
Salem	St Peters Episcopal Church	57,665	218,600	301,633	240,564	19,308	180,917	416,725
Sandwich	St Johns Episcopal Church	178,524	206,901	212,680	182,540	13,200	2,668	185,010
Saugus	St Johns Episcopal Church	95,034	185,923	275,251	187,802	6,051	10,458	199,052
Scituate	St Lukes Episcopal Church Scituate	205,937	296,800	314,907	314,705	32,835	11,292	314,705
Sharon	St Johns Church	7,864	42,264	42,264	49,035	0	0	49,035
Shirley	Trinity Chapel	49,821	73,635	74,988	76,040	3,100	0	77,393
Somerset	Church of Our Saviour	123,661	145,264	188,555	145,136	10,066	15,642	170,324
Somerville	St James Episcopal Church	42,476	91,878	91,878	90,689	3,556	0	91,477
South Hamilton	Christ Church	448,647	486,613	531,117	475,077	46,578	41,937	539,709
South Weymouth	Church of the Holy Nativity	117,075	159,127	209,127	152,268	15,795	5,000	152,268
South Yarmouth	St Davids Church	216,964	252,357	302,943	249,408	30,896	28,163	269,590
Southborough	St Marks Church	271,213	304,359	320,355	299,701	36,780	47,759	348,950
Stoughton	Trinity Episcopal Church	42,525	73,185	89,185	93,556	4,000	1,000	94,556
Sudbury	St Elizabeths Episcopal Church	367,588	418,596	976,621	512,306	49,918	93,982	605,288
Swampscott	The Church of the Holy Name	94,196	159,936	194,076	156,990	17,266	34,913	190,454
Swansea	Christ Episcopal Church	108,067	171,744	171,744	176,786	24,039	0	176,786
Taunton	Episcopal Church of St Thomas	136,032	249,541	299,541	357,793	29,624	50,000	407,793
Topsfield	Trinity Episcopal Church	257,808	284,968	333,716	285,365	28,014	3,484	288,449
Vineyard Haven	Grace Episcopal Church	183,684	305,524	376,896	300,261	39,009	195,232	488,992
Waban	Church of the Good Shepherd	398,071	424,636	557,969	431,193	49,013	29,442	431,484
Wakefield	Emmanuel Episcopal Church	127,119	160,750	303,923	191,456	16,037	30,231	223,091
Walpole	Epiphany Episcopal Church	115,272	179,833	205,776	231,440	20,452	17,559	247,883
Waltham	Christ Church Parish	106,550	219,061	285,474	189,162	19,697	83,010	267,095

## Diocese of Massachusetts

## Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2014

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledge Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Wareham	Church of the Good Shepherd	129,759	225,865	225,865	232,270	25,747	6,815	232,270
Watertown	Church of the Good Shepherd	99,563	200,897	209,438	202,883	8,820	8,085	206,477
Wellesley	St. Andrews Episcopal Church	751,812	1,155,494	1,191,290	1,103,059	132,141	94,660	1,143,619
Wellfleet	Chapel of St James the Fisherman	43,650	43,658	173,348	42,523	0	26,330	50,353
West Newbury	All Saints Episcopal Church	59,649	118,979	118,979	129,801	9,234	1,200	130,501
West Roxbury	Parish of Emmanuel Church	45,965	71,871	363,380	97,388	2,025	92,883	186,671
Westford	St Marks Episcopal Church	132,165	149,287	195,603	132,350	9,353	25,448	157,798
Weston	St. Peters Church Episcopal	381,554	508,552	692,504	536,007	64,000	24,873	538,568
Westwood	St. Johns Episcopal Church	147,953	163,488	265,755	112,032	17,500	28,716	138,342
Whitman	All Saints Parish	62,556	83,211	91,211	95,706	7,238	14,250	108,606
Wilmington	St. Elizabeths Episcopal Church	41,062	50,168	50,168	48,731	4,934	515	48,731
Winchester	Parish of the Epiphany	815,740	875,002	1,152,611	838,677	88,878	110,856	934,928
Winthrop	St. Johns Episcopal Church	118,608	148,833	210,472	148,617	11,417	16,859	166,776
Woburn	Trinity Episcopal Church	30,448	77,844	77,844	85,350	4,300	300	85,350
Woods Hole	Church of the Messiah Epis Church	141,112	294,125	362,361	292,844	29,331	132,441	438,210
Wrentham	Trinity Episcopal Church	183,113	185,382	231,687	21,928	18,728	60,200	79,128
Total		32,909,381	47,694,692	76,916,953	46,319,919	4,862,697	24,074,535	69,717,878

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