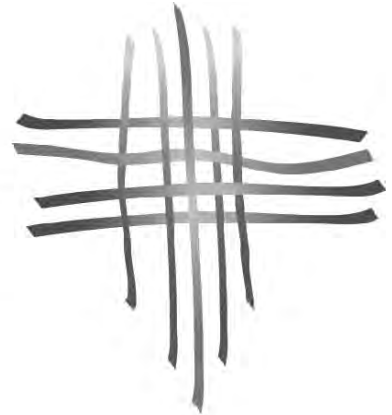


Episcopal Diocese
of Massachusetts



JOURNAL OF CONVENTION
2017

*Minutes and Papers of
the 232nd Annual Diocesan Convention*

*Reports of Committees, Staff and
Related Organizations*

**THE EPISCOPAL DIOCESE
OF MASSACHUSETTS**

2017 DIOCESAN JOURNAL

of the

**TWO HUNDRED THIRTY-SECOND ANNUAL SESSION
OF THE DIOCESAN CONVENTION
NOVEMBER 4, 2017**

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 thirty-third Annual Session of the Convention of the Episcopal Diocese of Massachusetts will be held on Saturday, November 3, 2018, at the Cape Cod Resort and Conference Center in Hyannis, MA, at a time to be announced in the Canonical Notice which will be mailed to each member, clerical and lay, in October 2018.

Leon A. Brathwaite II
Secretary

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

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Ecumenical Officer Vacancy	

Diocesan Council	
<i>Elected from Deaneries</i> (term in parentheses ends at Convention of year listed)	
Alewife	
Mr. Ted Ts'o (Church of Our Saviour, Arlington)	2019 (2)
The Rev. Paul Minor (All Saints' Church, Belmont)	2019 (1)
Boston Harbor	
Ms. Betsy Ridge Madsen (Church of the Advent, Boston)	2018 (1)
The Rev. Thomas Mousin (St. John's Church, Charlestown)	2019 (2)
Cape & Islands	
Ms. Constance Melahoures (Christ Church, Plymouth)	2017 (2)
The Rev. David Fredrickson (Christ Church, Plymouth)	2019 (1)
Charles River	
Vacancy	2019 (1)
The Rev. Todd Miller (Trinity Church, Newton)	2017 (1)
Concord River	
Mr. Win Treese (St. Elizabeth's Church, Sudbury)	2018 (1)
The Rev. Phil LaBelle (St. Mark's Church, Southborough)	2019 (1)
Merrimack Valley	
Ms. Virginia Rogers (St. Paul's Church, Newburyport)	2017 (1)
The Rev. Jane Bearden (Trinity Church, Haverhill)	2018 (2)
Mt. Hope-Buzzards Bay	
The Rev. Rebecca Blair (St. Andrew's Church, New Bedford)	2019 (2)
Ms. Carol Friar (St. Luke's Church, Fall River)	2018 (2)
Mystic Valley	
Mr. David Sullivan (Emmanuel Church, Wakefield)	2019 (1)
The Rev. Walter Connelly (St. John's Church, Winthrop)	2017 (1)
Neponset River	
Mr. Matt Harper-Nixon (St. Paul's Church, Dedham)	2017 (2)
The Rev. Rebecca Black (Christ Church, Medway)	2019 (2)
North Shore	
Ms. Gail Campbell (St. John's Church, Beverly Farms)	2019 (1)
The Rev. Debbie Phillips (Grace Church, Salem)	2017 (1)
South Shore	
Ms. Diane Grondin (Christ Church, Quincy)	2018 (1)
The Rev. Noble Scheepers (Trinity Church, Marshfield)	2019 (1)
Taunton River	
Mr. Robert Kelleher (Trinity Church, Bridgewater)	2017 (1)
The Rev. Meghan Sweeney (All Saints' Church, Attleboro)	2017 (1)

Diocesan Council <i>(continued)</i>	
Appointed by the Bishop	
The Rev. George Stevens (St. Mary's Church, Newton Lower Falls)	2017 (2)
Ms. Janine Whitter (St. Peter's Church, Cambridge)	2017 (2)
Vacancy, Lay	2017 (1)
Mr. Billy Boyce (Grace Church, New Bedford)	2019 (2)
The Rev. Dr. Karen Coleman (St. James's Church, Somerville)	2019 (2)
Vacancy, Lay	2019 (1)
Cathedral Chapter Representative	
Vacancy	2019 (1)
Diocesan Youth Council Representatives	
Ms. Gabby Amisano (Grace Church, Everett)	2017 (1)
Ms. Mariana Sanborn (St. James's Church, Amesbury)	2017 (1)
Diocesan Officers	
The Rt. Rev. Alan M. Gates	
The Rt. Rev. Gayle E. Harris	
Mr. Leon A. Brathwaite II, Secretary	
Ms. Lisa Garcia, Treasurer	
Executive Committee	
Ms. Connie Melahoures (Christ Church, Plymouth)	2017 (2)
The Rev. Debbie Phillips (Grace Church, Salem)	2017 (1)
Ms. Carol Friar (St. Luke's Church, Fall River)	2018 (2)
The Rev. Rebecca Black (Christ Church, Medway)	2019 (2)
The Rev. Dr. Karen Coleman (St. James's Church, Somerville)	2019 (2)
The Rev. Tom Mousin (St. John's Church, Charlestown)	2019 (2)
Ms. Lisa Garcia, Treasurer	
Ex Officio	
Vacancy, Ecumenical Officer	
Mr. Gerry Sullivan, Assistant Treasurer	
Ms. Lynn Smith, Registrar-Historiographer	
Ms. Laura Simons, Assistant Secretary	

Standing Committee (term ends at Convention of year listed)	
The Rev. Pamela Wertz, President	2017
Ms. Constance Perry, Vice President	2017
Angela McConney Scheepers, Esq., Secretary	2018
The Rev. Chris Wendell	2018
Mr. John Iredale	2019
The Rev. Andrew Stoessel	2019
The Rev. Matthew Cadwell	2020
Mr. Wayne Kennard	2020
Staff: Ms. Laura Simons	
Commission on Ministry (term ends at Convention of year listed)	
Co-Chairs:	
The Rev. Miriam Gelfer	2017
Ms. Kay Ridgard	2019
The Rev. Kate Ekrem	2017
The Rev. Edwin Johnson	2017
Mr. Graeme Mills	2017
Dr. Laura Crain	2018
The Rev. Eric Hillegas	2018
The Rev. Daniel Horgan	2018
The Rev. Sarah Kelb	2018
The Rev. Edgar Gutierrez-Duarte	2019
Mr. Matthew Hutchings	2019
The Rev. Dr. James Weiss	2019
The Ven. Patricia Zifcak	2019
Chaplain to Postulants and Candidates:	
The Rev. Dr. David Killian	
Examining Chaplain:	
The Rev. Dr. Libby Gibson	2017
Staff: The Rev. Canon Dr. Edie W. Dolnikowski	

Deputies to General Convention 2018	
<u>Clerical</u> The Rev. Mally Ewing Lloyd The Rev. Edwin Daniel Johnson The Rev. Thomas J. Brown The Rev. Karen B. Montagno	<u>Lay</u> The Hon. Byron Rushing Dr. Fredrica Harris Thompsett Mr. William C. Boyce Mr. Samuel J. Gould
Alternate Deputies to General Convention 2018 To be elected at Diocesan Convention 2017	
<u>Clerical</u> The Rev. Dr. Karen Coleman The Rev. Canon William C. Parnell The Rev. Debbie Phillips	<u>Lay</u> Ms. Betsy Ridge Madsen Ms. Susannah Perkinson
Deputies and Alternates to Provincial Synod	
<u>Clerical</u> Deputy: The Rev. Dr. Karen Coleman Alternate: The Rev. Rebecca Black	<u>Lay</u> Deputy: Ms. Rebecca Alden Alternate: Ms. Julie Watt Faqir
Diocesan Disciplinary Board (elected by Convention; term ends at Convention of year listed)	
<u>Clerical</u> The Rev. Mary Scott Miller 2020 The Rev. Dr. Karen Coleman 2018 The Rev. Kathleen Lonergan 2018 The Rev. Nancy Gossling 2019 The Rev. Chris Wendell 2019	<u>Lay</u> Ms. B. Judy Fenner 2020 Ms. Julie Shea 2020 Mr. Dan Clevenger 2018 Mr. Brian Litzenberger 2019

Cathedral Chapter**Bishop**

The Rt. Rev. Alan M. Gates

Bishop Suffragan

The Rt. Rev. Gayle E. Harris

Episcopal Presence

The Rt. Rev. Barbara C. Harris

Acting Dean

The Rev. Nancy E. Gossling

Canons

The Rev. Canon Connie Ng Lam

The Rev. Canon Cristina Rathbone

The Rev. Canon Edward W. Rodman

Chancellor

Vacancy

Treasurer

Ms. Jane V. Peyrouse

Clerk

Vacancy

Assistant Treasurer

Mr. Gerald Sullivan

Assistant Clerk/Recording Secretary

Ms. Ethel L. Crawford

Term Expires January 2018

Mr. James Van Looy

Ms. Bernetta Morton

Ms. Betsy Munzer

The Rev. Deborah A. Phillips

Term Expires January 2019

Ms. Myra Anderson

The Rev. Isaac Everett

Mr. W. Loren Gary

Lay Vacancy

Term Expires January 2020

The Rev. Patrick C. Ward

Ms. Jennifer Hopcroft

Lay Vacancy

Barbara C. Harris Camp and Conference Center

www.bchcenter.org
PO Box 204, 108 Wally Stone Ln, Greenfield NH 03047
(GPS: Use 400 Sawmill Rd)

A ministry of the diocese, the center is located 90 minutes from Boston in the scenic Monadnock region of southwest New Hampshire. In addition to the active, fun and challenging summer camp program offering a small group approach and Christian community that inspires campers to grow in faith, the center serves as a year-round conference center hosting church and other groups in modern facilities built in 2003.

Contact: Mr. John Koch, 603-547-3400
Executive Director info@bchcenter.org

Camp Board

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The Rt. Rev. Alan M. Gates

Bishop’s Designated Rep

Mr. Lynd Matt

Diocesan Staff

The Rev. H. Mark Smith

Camp Staff

Mr. John Cook
Ms. Alessia Doss

Term Expires 2017

Dr. Don DeLollis
The Rev. Richard Matthews
The Rev. Paula Toland
Mr. Jonathan Treat

Term Expires 2018

Ms. Allison Johnson
Mr. Stephen Mascoll
Dr. Karen McAlmon
The Rev. Natasha Stewart

Term Expires 2019

The Rev. Aileen DiBenedetto
Mr. Andrew Foss
Dr. Michelle Porche
Vacancy
Vacancy

Diocesan Staff and Other Personnel

Alphabetical by Last Name

As of May 1, 2017

This is a broad roster that, in addition to diocesan staff, comprises numerous other personnel, including cathedral staff, Episcopal City Mission and those of affiliated organizations housed at the diocesan offices, as well as deacons and volunteers with dedicated diocesan assignments and responsibilities.

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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 2017 (or before)

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

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

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

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

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

NOTES:

-The Bristol Cluster comprises St. Mark's Church, North Easton; The Church of St. John the Evangelist, Mansfield; and St. John's Church, Taunton

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

-Messiah, Auburndale and Trinity, Newton Centre merged in 2015 using the Trinity corporation entity for the combined parishes

III.

MISSION CHURCHES IN UNION WITH THE CONVENTION

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

IV.

CONGREGATIONS, CHAPELS AND MISSIONS WITH DATES OF ORGANIZATION

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

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Anoma Abeyaratne	Priest Associate, All Saints, Brookline
Thomas E. Adams Jr.	Retired
Abraham C. Allen	
David Edward Allen	Retired; Rector Emeritus, St. Mary's, Barnstable
David Eastman Allen SSJE	Retired; Guest House Staff, Society of St. John the Evangelist, Cambridge
Joel Almono	Rector, Grace, Lawrence
Curtis G. Almquist SSJE	Retired; Brother, Society of St. John the Evangelist, Cambridge
Rospignac Ambroise	Priest-in-Charge, St. John St. James, Roxbury; Associate Priest, Grace, Everett
Juliana C. Anderson	Retired
Shirley M. Andrews	Retired
David M. Angelica	Retired
Mark S. Anschutz	Retired
Holly L. Antolini	Rector, St. James's, Cambridge
Robert B. Appleyard Jr.	Retired
Richard S. Armstrong	Retired
Zenetta M. Armstrong	Rector, Holy Spirit, Mattapan
Margaret L. Arnold	Assistant Rector, Grace, Medford
Russell C. Ayers	Retired
Ramon I. Aymerich	Retired; Priest Associate, Holy Comforter, Charlotte, NC
Stephen T. Ayres	Vicar, Christ Church, Boston
Robert Bacon Jr.	Rector, St. Paul's, Lynnfield
Robert R.M. Bagwell	
Grant W. Barber	Chaplain, Boston College, Chestnut Hill
David M. Barney	Retired
G. Stewart Barns	Retired
Patricia R. Barrett	Retired
E. Tom Barrington Jr.	Interim, St. Stephen's, Lynn
Thomas A. Bartlett	Deacon, Our Saviour, Brookline
Charles D.H. Barton	Retired
John T. Beach	Rector, St. Paul's, Nantucket
Jennifer D. Beal	Priest-in-Charge, St. John's, Sharon
Jane Bostick Bearden	Rector, Trinity, Haverhill
Robert J. Bela	Retired
Cynthia Bell	Retired; Hospice Chaplain

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Daniel P. Bell	Chaplain, Tufts University, Medford
Robert A. Bennett	Retired
Bruce L. Benshoff	Retired
Elizabeth S. Berman	Canon for Congregations, Diocese of Massachusetts
Daniel L. Bernier	Rector, Good Shepherd, Wareham
Christiaan A. Beukman	Deacon; Pastoral Ministries Manager; Linden Ponds; St. John's, Franklin
Michael Billingsley	Retired
Harold G. Birkenhead	Rector, Holy Nativity, South Weymouth
Katharine C. Black	Retired
Rebecca Black	Priest-in-Charge, Christ Church, Medway
Rebecca H. Blair	Rector, St. Andrew's, New Bedford
Anne B. Bonnyman	Retired
Steven C. Bonsey	
Dean W. Borgman	Prof. of Youth Ministry, Gordon Conwell Theological Seminary; Associate Priest, Christ Church, South Hamilton
V. Michael Bousquet	
Jeffrey H. Boyd	
Stephanie Chase Bradbury	Rector, St. John's, Beverly Farms
William J. Bradbury	Rector, All Saints', Chelmsford
Lyn G. Brakeman	Retired; Diocesan EfM Co-Coordinator
James P. Breeden	Retired, Part-time teacher at School for International Training
R. John Brockmann	Rector, Grace, Norwood
Sarah J. Brockmann	Rector, Trinity, Rockland
Henderson L. Brome	Retired
Clifford R. Brown	Rector, Christ Church, Quincy
R. Mark Brown SSJE	Retired; Brother, Society of St. John the Evangelist, Cambridge
Thomas J. Brown	Rector, Epiphany, Winchester
Gwen L. Buehrens	Retired
Eletha A. Buote-Greig	
Eletha A. Buote-Greig	
Richard Burden	Rector, All Saints, Brookline
Alden R. Burhoe	Retired
Richard E. Burke	Retired

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Whitney H. Burr	Retired
Matthew Cadwell	Rector, Emmanuel, Wakefield
Joyce C. Caggiano	Retired
Lynn Campbell	Rector, St. Peter's, Weston
Edward M. Cardoza	Priest-in-Charge, St. Mark's, Foxborough
Julie A. Carson	Rector, St. Andrew's, Framingham
Roy F. "Bud" Cederholm Jr.	Retired Bishop Suffragan of Massachusetts
R. Arrington Chambliss	Executive Director, Episcopal City Mission; Priest Associate, St. Mary's, Dorchester
Susan Esco Chandler	Retired
Constance Chandler-Ward	Retired; Greenfire Retreat Center
George M. Chapman	Retired
James D. Chapman	Deacon, All Saints of the North Shore, Danvers
Tansy Chapman	Retired
Peter G. Chase	Retired
Randall Chase Jr.	Retired
Alison Cheek	Retired
Michael R. Cheney	Retired
Sharon L. Ciccarelli	Associate Priest, Trinity, Newton Centre
Scott A. Ciosek	Priest-in-Charge, St. Peter's, Dartmouth
Bradford Clark	Rector, Ascension Memorial, Ipswich
Jacqueline Clark	Associate Rector, St. Elizabeth's, Sudbury
Judith F. Clark	Retired
Richard T. Clark	Retired
John R. Clarke	Rector, St. Paul's, Malden
Thomas G. Cleveland	Retired; Faculty, Milton Academy
Ann S. Coburn	Retired
Suzanne F. Colburn	Retired
Theodore Cole Jr.	Rector, St. John's, Jamaica Plain
Karen Coleman	Rector, St. James's, Somerville, Chaplain, Boston University
Jeremi A. Colvin	Assistant Rector, Holy Spirit, Fall River
Louise R. Conant	Retired
John H. Conn	Retired
Walter J. Connelly Jr.	Rector, St. John's, Winthrop

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Sarah Amy Conner	Interim, Trinity, Concord
Michael Corrigan	Retired
Gay P. Cox	Deacon
Roger Weldon Cramer	Retired
John D. Crandall	Retired
Marcus T. Crapsey II	Retired
Malia Crawford	Rector, Our Saviour, Arlington
Timothy E. Crellin	Vicar, St. Stephen's, Boston
Kate Cress	Rector, Our Saviour, Somerset
Margot Critchfield	Retired
Daniel F. Crowley	Retired
Joao A.A. d'Alcaravela	Retired
Jennifer Grumhaus Daly	Deacon, St. Michael's, Milton
Michael B. Dangelo	Rector, Redeemer, Chestnut Hill
Rainey Dankel	Associate Rector for Pastoral Care and Community Life, Trinity, Boston
Charles Laskin David	
E. Gale Davis	Retired; Associate Rector, St. Paul's, Natick
Judith A. Davis	Rector, Christ Church, Harwich Port
Robert C. Day	Retired
John de Beer	Retired
Patricia J. de Beer	Retired
Chitral S. de Mel	Priest-in-Charge, Good Shepherd, Dedham
Marya L. DeCarlen	Rector, All Saints of the North Shore, Danvers
Laurel P. Deery	Deacon, Common Art, Ecclesia Ministries, Boston
E. Robert Dickson Jr.	Retired
Edith W. Dolnikowski	Canon for Ordained Ministries, Diocese of Massachusetts
Mary Jane Donohue	
Ennis Duffis	Rector, St. Anne's, Lowell
Donald M. Dunbar	Retired
Marc G. Eames	Rector, Advent, Medfield
Richard F. Ebens	Retired
Malcolm D. Eckel	Associate Professor of Religion, Boston University
William W. Eddy	Retired

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Jonathan T. Eden	Associate Rector, Christ Church, Cambridge
Mark D.W. Edington	Rector, St. John's, Newtonville
Robert D. Edmunds	Retired
Robert B. Edson	Retired; Interim, Emmanuel, West Roxbury; Co-Chair of the Chaplains to Retired Clergy, Spouses and Surviving Spouses
Marisa Egerstrom	Priest Associate, St. Stephen's, Boston
Katherine B. Ekrem	Rector, Our Redeemer, Lexington
C. Clyde Elledge II	Rector, St. Andrew's, Marblehead
Kathryn N. Elledge	Rector, All Saints', Stoneham
Gareth C. Evans	Rector, Good Shepherd, Acton
Katharine C. Evans	Retired
Isaac Everett	Community Development Manager, Boston-Cambridge Mission Hub
Norman J. Faramelli	Retired
Manuel P. Faria III	Rector, St. Peter's, Beverly
Thomas C. Ferguson	Rector, St. John's, Sandwich
John A. Fesq	Retired
Elise Feyerherm	Assoc. Rector, St. Paul's, Brookline
Heidi A. Fieldston	Retired
Christopher J. Fike	Priest-in-Charge, St. Elizabeth's, Wilmington
John H. Finley IV	Head of School, Epiphany School, Dorchester; Associate Priest, St. Mary's, Dorchester
Paige F. Fisher	
Sue Fisher Seeger	Deacon, Our Saviour, Arlington; Member of the Chaplaincy, Spaulding Rehab. Hospital, Boston
Jessica Flaherty	Priest Associate, Grace, Everett
Philip J. Flaherty	Deacon, All Saints', Whitman
Alden B. Flanders	Retired
Francis Fornaro	Retired
E. Louise Forrest	Interim, St. Barnabas's, Falmouth
Lisa R. Fortuna	Priest Associate, Trinity, Melrose
Virgilio Fortuna BSG	Deacon
Dwight C. Fortune	Retired
Pamela L. Foster	Retired
Anne C. Fowler	Retired

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
L. Nelson Foxx	Retired
Karen A. Fraioli	
Ann H. Franklin	Retired
Julian K. Fredie Jr.	Deacon, St. Cyprian's, Roxbury
David A. Fredrickson	Rector, Christ Church, Plymouth
Stephen A. Fregeau	Retired
Christen S. Frothingham	
Harold W. Garbarino	Retired
Emily J. Garcia	
Anne E. Gardner	Director of Spiritual and Religious Life and Protestant Chaplain, Phillips Academy, Andover
G. Kenneth Garrett	Retired
Alan M. Gates	Bishop Diocesan
Judith S. Gay	Retired Missionary; Associate Priest, St. James's, Cambridge
Susan L. Geissler-O'Neil	
Miriam C. Gelfer	Retired; Associate Rector, Epiphany, Winchester
Maggie Geller	Deacon; Staff Nurse ICU, Children's Hospital, Boston
Cathy H. George	
Rebecca B. Gettel	Associate Rector, Trinity, Concord
Elizabeth Gibson	Rector, St. Mary's, Barnstable
James K. Githitu	Retired
Charles L. Glenn	Retired
Patricia D. Gober	Retired
Wallace G. Gober	Retired
Michael J. Godderz	Rector, All Saints', Dorchester
Andrew Goldhor	Assistant Rector, Our Redeemer, Lexington
Mary M. Gonzalez	Retired
Elizabeth Good	Deacon
Billie Mae Gordon	Retired; Co-Chair of the Chaplains to Retired Clergy, Spouses and Surviving Spouses; Bridge Priest, Scituate
Martin J. Goshgarian	Retired
Nancy E. Gossling	
Jane S. Gould	

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Eleanore L. Gowen	Deacon; Retired
Patrick T. Gray	Rector, Christ Church, South Hamilton
Robert C. Greiner	Deacon, Emmanuel, Boston
Gretchen Grimshaw	Rector, St. Paul's, Newton Highlands
Elizabeth Anne Grundy	Priest-in-Charge, St. Peter's, Osterville
Edgar Gutierrez-Duarte	Vicar, St. Luke's-San Lucas, Chelsea
Nancy J Hagner	Rector, Trinity, Concord
Addison C. Hall	Retired
Lisbeth J. Hall	Retired; Spiritual Director
W. Michael Hamilton	Archdeacon for Ordained Deacons, Diocese of Massachusetts; Deacon, St. Mark's, Southborough; Pharmacist
Robert L. Hammett	Retired
Patricia Handloss	Retired
Stanley P. Hardy	Retired; Speech/Language Assistant
Catherine A. Harper	Deacon, St. Gabriel's, Marion
Barbara C. Harris	Retired Bishop Suffragan of Massachusetts
Gayle Elizabeth Harris	Bishop Suffragan
Merritt R. Harrison	Retired
Holly Hartman	Deacon, Grace, Everett; Diocesan Deacon for Global Ministries
Michael Hartwell	Retired
Bret B. Hays	Rector, St. John's, Gloucester
Catherine Healy	Assistant Rector, St. Andrew's, Wellesley
Charles C. Hefling	Retired; Associate Professor, Theology Department, Boston College
Scott H. Helferty	Retired
Alan R. Hesse	Rector, Christ Church, Swansea
William B. Heuss	Priest-in-Charge, Trinity, Oak Bluffs
Carter Heyward	Retired
Eric M. Hillegas	Rector, St. Chrysostom's, Quincy
Duncan L. Hilton	
Edward H.C. Ho	Retired
Michael J. Hodges	Rector, Christ Church, Andover
Marsha H. Hoecker	Priest and Lead Organizer, The Crossing, Boston; Rector, Trinity Chapel, Shirley
Therese Hofmann	Deacon, Director of Spiritual Life, Curry College

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Megan Holding	Priest Associate, St. Paul's, Brookline
Kristine M. Holmes	Deacon
Daniel E. Horgan	Deacon
James H. Hornsby	Retired; Rector Emeritus, St. Luke's, Fall River
Marguerite A. Howell	Retired
Cynthia P. Hubbard	Retired
Martha L. Hubbard	Rector, St. Paul's, Newburyport
Jennifer S. Hughes	Professor of Religious Studies, Dept. of Religion, Univ. of California, Riverside; Urban Resident, Christ Church, Iglesia San Juan, Hyde Park
E. Bradlee Hultman	Retired
Donald A. Hunt	Retired
Marshall W. Hunt	Retired
Victoria Wells Hunt	Retired
Joel M. Ives	Rector, Our Saviour, Brookline
Robert S. Jackson	Retired
Philip C. Jacobs III	Retired
Donald W. Jaikes	Retired
F. Washington Jarvis	Retired; Associate Priest, All Saints', Dorchester
Harry Jean-Jacques	
Peter L. Jeffrey	Deacon, Good Shepherd, Reading
Philip E. Jerauld	Retired
Edwin D. Johnson	Rector, St. Mary's, Dorchester
Joan Cotrell Johnson	Retired
Kenneth W. Johnson	Deacon
David K. Johnston	Retired; Pastoral Counselor
Kenneth L. Jones	Retired
Elizabeth J. Jordan	Deacon, St. Paul's, Newburyport
Kapya John Kaoma	Priest-in-Charge, Christ Church, Hyde Park; Priest-in-Charge, Iglesia de San Juan, Hyde Park; Missioner for African Ministries, Diocese of Massachusetts
Rosanna Case Kazanjian	Retired; Spiritual Director
Victor H. Kazanjian Jr.	Executive Director, United Religions Initiative
Diane Dorothea Keith-Lucas	Chaplain, MIT, Cambridge
Brian S. Kelley	Retired

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Maureen Dallison Kemeza	Retired; Priest Associate, Trinity, Concord
Thomas B. Kennedy	Retired
Margery Kennelly	Chaplain, Episcopal Chaplaincy at Harvard, Cambridge
Edward C. Kienzle	Retired
David A. Killian	Retired
Allan B. King Jr.	Retired
Benjamin J. King	Associate Professor, School of Theology, University of the South, Sewanee, TN
Elise Kinney	Retired
Hall Kirkham	Rector, St. Michael's, Milton
James C. Knudson	Retired
T. James Kodera	Rector, St. Luke's, Hudson; Professor, Wellesley College
William M. Kondrath	Retired
Beulah C. Koulouris	Retired
Armand Kreft	Retired
Matthew C. Kruger	
Judith S. Krumme	Retired; Priest Associate, Trinity, Concord
Philip J. Kuhn	Rector, Trinity, Randolph
Philip N. LaBelle	Rector, St. Mark's, Southborough
Patrick LaFortune	Urban Resident, Good Shepherd, Reading
James R. LaMacchia	
Robert D. Landreth	Retired
Gerard M. Lawrence	Retired
Susan Lederhouse	Rector, St. Peter's, Buzzards Bay
Susan H. Lee	Rector, St. Luke's, Fall River
Sean T. Leonard	Rector, St. Dunstan's, Dover
Kenrick Lewis	Retired
Adam S. Linton	Rector, Holy Spirit, Orleans
Eric R. Litman	Assistant Rector, St. James's, Cambridge
Dorothella Littlepage	Director, Roxbury/Dorchester Mission Hub; Priest Associate, St. Martin and St. Augustine, Boston
Mally Ewing Lloyd	Interim, St. John's, Duxbury
Samuel T. Lloyd III	Retired
Bruce A. Lomas	Rector, Trinity, Melrose

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Kathleen G. Lonergan	Rector, St. James's, Groveland
Richard T. Loring	Retired
Raymond A. Low	Retired
Daniel K. MacDonald	
Katherine M. Malin	Rector, St. Anne's-in-the-Fields, Lincoln
Alice B. Mann	Retired
Louise Mann	Retired
J. Amanda March	
Michael J. Marrone	Retired
Elizabeth Marsh	Therapist
Robert K. Massie	Executive Director, CERES
Sarah D. Mato	Rector, St. Paul's, North Andover
Kathleen A. McAdams	Rector, St. John's, Franklin
James P. McAlpine	Retired
Terry A. McCall	Retired
Melanie McCarley	Rector, St. Paul's, Dedham
Stephen J. McCarthy Jr.	
Amy McCreath	Rector, Good Shepherd, Watertown
A. Homer McCue	Retired
Robert B. McFarlane	Retired
John E. McGinn	Retired; Bridge Priest, St. Stephen's, Cohasset
Jacqueline McGrady	
Brian W. McGurk	Rector, St. Christopher's, Chatham
Devin McLachlan	
John N. McLaughlin	Retired
Lauren McLeavey	Rector, St. Anne's, No. Billerica
Michael P. Melendez	Deacon; Professor of Social Work; Clinical Social Worker
Jeffrey W. Mello	Rector, St. Paul's, Brookline
William G. Messenger	Executive Editor, Theology of Work Project, Cambridge
Wendel W. Meyer	Retired
David R. Milam	Rector, Our Saviour, Middleborough
Nancy Elizabeth Milholland	Senior Software Engineer, Genentech; Priest Associate, St. Gregory of Nyssa, San Francisco, CA

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Mary Scott Miller	Assoc. Rector, Christ Church, Needham
Todd L. Miller	Rector, Trinity, Newton Centre
Donald A. Milligan	Retired
Christen H. Mills	Priest-in-Charge, Epiphany, Walpole
Lorraine M. Mills-Curran	Deacon, Brazilian Ministry, Concord River Deanery
Cheryl V. Minor	Co-Rector, All Saints', Belmont
Paul L. Minor	Co-Rector, All Saints', Belmont
Anne M. Minton	Retired; Retired Professor of History and Religion, Bunker Hill Community College
Karen Brown Montagno	Director of Congregational Resources and Training, Diocese of Massachusetts
Eduardo Monzon	Retired
Christopher R. Morck	Rector, Grace, New Bedford
Nicholas M. Morris-Kliment	Rector, Christ Church, Needham
Jerry D. Morrow	Retired
Roger C. Moulton	Retired
Thomas N. Mousin	Rector, St. John's, Charlestown
Thomas P. Mulvey Jr.	Rector, Emmanuel, Braintree
Joseph T. Mumita	Priest-in-Charge, Grace, Everett
Rebecca M. Murphree	Science Teacher, Galvin Middle School, Wakefield
Roger E. Nelson	Retired
Jay L. Newberry	Retired
Bruce E. Nickerson	Deacon; Retired
Daphne Bess Noyes	Deacon, Advent, Boston
Jean Baptiste Ntagengwa	Director of Transition Ministry, Diocese of Massachusetts
Robert E. Outman-Conant	Retired
W. Russell Page Jr.	Retired
Eleanor J. Panasevich	Retired
Pui-kong Thomas Pang	Retired; Director, Religious Education Resource Centre, Anglican Province of Hong Kong
Terry R. Pannell	Rector, St. Mary's, Provincetown
Cynthia D. Pape	Deacon, Cathedral Church of St. Paul, Boston
Barbara D. Parini	Retired
Donald H. Parker	Retired
Roy E. Parker OHC	Monastic; calligrapher

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
William Clay Parnell	Canon to the Ordinary, Diocese of Massachusetts
Charles F. Parthum III	Retired
Richard L. Payne	Retired; Part-time school psychologist
Bryan Pearson	Priest-in-Charge, St. Mark's, Burlington; Priest Associate, Cathedral Church of St. Paul, Boston
Edwin C. Pease	Retired
Catherine Louise Perkins SSM	Librarian, Archivist, Society of St. Margaret
Barbara Ann Peterson	Retired
Rachael Pettengill-Rasure	Rector, Our Saviour, Milton
Deborah A. Phillips	Rector, Grace, Salem
Jennifer M. Phillips	Rector, St. John's, Westwood
Joseph T. Pinho	Retired
Geoffrey T. Piper	Rector, St. Gabriel's, Marion
Louis W. Pitt Jr.	Retired
Wanda Pizzonia	Retired
John Michael Povey	Retired
Rita Powell	Associate Rector, Trinity, Boston
Sharon K. Powers	Deacon
David Prentice	Curate, All Saints of the North Shore, Danvers
Phyllis A. Price	Retired
Warren R. Radtke	Retired; Management Consultant
Brian Raiche	Priest-in-Charge, Good Shepherd, Reading
S. Lester Ralph	Retired
Sarah A. Randall SSM	Society of St. Margaret, Duxbury
Cristina Rathbone	Canon Missioner, Cathedral Church of St. Paul, Boston
Nathaniel T. Reece	Retired
Jennifer B. Reiley	Administrator and Therapeutic Consultant to Residential Programs
Maria Regina Retamal	Retired
William W. Rich	Associate Rector for Adult Christian Formation, Trinity, Boston
Susan O. Richmond	Retired
Linda H. Ricketts	Retired
Kathleen Pakos Rimer	Associate Priest, St. James's, Cambridge
Adrian Robbins-Cole	Rector, St. Andrew's, Wellesley

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Sarah Robbins-Cole	Rector, St. Michael's, Holliston
Joseph O. Robinson	Rector, Christ Church, Cambridge
Michael Robinson	
Paul B. Rodgers	US Navy Staff Chaplain
Edward W. Rodman	Retired
Michael J. Roeske	
Laurie Ann Rofinot	
Timothy James Rogers	Priest-in-Charge, St. John's, Holbrook
Suzan J. Rolfe-Boutwell	Spiritual Director; Author
Ema Rosero-Nordalm	Deacon
Carlton T. Russell	Retired; Professor of Music and College Organist, Emeritus, Wheaton College, Norton
Adele Marie Ryan SSM	Superior, Society of St. Margaret
John Satula	Rector, St. James's, Amesbury
Noble F. Scheepers	Rector, Trinity, Marshfield
Timothy E. Schenck	Rector, St. John the Evangelist, Hingham
Joyce L. Scherer-Hoock	Rector, St. Andrew's, Ayer
Kenneth Schmidt	Deacon, Good Shepherd, Watertown
William J. Schneider	Retired
Susan M.B. Schwab	Retired
Margaret K. Schwarzer	Associate Rector, St. Andrew's, Wellesley
Paul M. Schwenzfeier	Retired
Vincent Seadale	Rector, St. Andrew's, Edgartown
Albert N. Sears III	Retired
Nancy H. Shepherd	Retired
Thomas C. Shepherd	Retired
Robert L. Sherwood	Deacon, St. Peter's, Buzzards Bay
Michael O. Shirley	Retired
David J. Siegenthaler	Retired
Richard J. Simeone	Retired; Spiritual Director; Diocesan EfM Co-Coordinator
John E. Simson	D.Min. program, Church Divinity School, Berkeley, CA
Herbert C. Skelly	Retired
Amy Whitcomb Slemmer	
Claude A. Smith	Retired

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Gail S. Smith	Priest Associate, Holy Spirit, Orleans
H. Mark Smith	Deacon, Holy Spirit, Mattapan; Director of Youth Ministry, Diocese of Massachusetts
John F. Smith	Retired; Priest, St. James the Fisherman, Wellfleet
Nancy S. Smith	Retired
Stephen V. Smith	Retired
Barbara P. Smith-Moran	Retired; Journal Editor; Academic Program Administrator
Susanna J. Snyder	
Tara K. Soughers	
Kevin H. Sparrow	Assistant for Administration and Coordinator of Children's Ministries, Christ Church, Cambridge
Adrian Stair	Retired
Elizabeth Steinhauser	Priest Associate and Director of Youth Programs, St. Stephen's, Boston
Leslie K. Sterling	Rector, St. Bartholomew's, Cambridge
Audrey O'Brien Stewart	Canon for Mission, Diocese of Glasgow, Scotland
Matthew W. Stewart	Rector, Holy Spirit, Fall River
Natasha F. Stewart	Rector, Trinity, Bridgewater
Andrew J. Stoessel	Rector, St. Michael's, Marblehead
Barbara E. Stowe	Deacon; Retired
Jon C. Strand	Rector, St. Paul's, Natick
John P. Streit Jr.	Retired
Judith L. Stuart	
David P. Sullivan	Deacon; Retired
Maryalice Sullivan	Retired
Meghan T. Sweeney	Priest-in-Charge, All Saints', Attleboro
Andrea S. Taylor	Rector, St. David's, South Yarmouth
Mark A. Templeman	Rector, Holy Name, Swampscott
Eleanor Terry	Associate Vicar, Christ Church, Boston
Evan L. Thayer	Rector, St. Augustine and St. Martin, Boston; HIV Case Manager for service organization
Ronald Creighton Tibbetts	Deacon, Trinity, Wrentham; Retired
Robert W. Tobin	Retired
Michele A. Torres	Bilingual Hospital Chaplain, Children's Hospital, Boston; Associate Priest, St. James's, Cambridge

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
John T. Townsend	Retired; Lecturer, Jewish Studies, Harvard Divinity School
Geoffrey R. Tristram SSJE	Society of St. John the Evangelist, Cambridge
David B. Van Dusen	Retired
Sarah A. van Gulden	Priest-in-Charge, St. John's, Saugus
Noah Van Niel	Curate, St. John the Evangelist, Hingham
Stephen O. Voysey	Retired; Interim Associate Priest, St. John's, Beverly Farms
David B. Vryhof SSJE	Brother, Society of St. John the Evangelist, Cambridge
Karin E. Wade	Rector, St. Mary's, Rockport
Suzanne B. Wade	Rector, St. Mark's, Westford
Elsa Ph. Walberg	Retired
Janice Walden	Bridge Priest, St. Andrew's, Hanover
Harry E. Walton	Rector, Trinity, Stoughton
Regina Laba Walton	Rector, Grace, Newton
Sze-kar Wan	Prof. of New Testament, Perkins School of Theology, Dallas, TX
Patrick C. Ward	Associate Rector, Trinity, Boston
Deborah M. Warner	Rector, Messiah, Woods Hole
Allan B. Warren III	Rector, Advent, Boston
Russell Way	Retired
James M. Weiss	Associate Professor of Theology, Boston College, Associate Priest, St. James's, Cambridge
G. Truman Welch	Retired
James Weldon	Rector, Good Shepherd, Waban
George H. Welles Jr.	Retired
Christopher Wendell	Rector, St. Paul's, Bedford
Peter W. Wenner	Retired
Pamela L. Wertz	Rector, Emmanuel, Boston
George A. Westerberg	Retired
Elizabeth Wheatley-Dyson	Retired
James S. Whitaker	Retired
Bailey Whitbeck	Retired
Christopher W. Whiteman	Chaplain, Groton School, Groton
Elizabeth Whitmore	Deacon, Christ Church, Plymouth
Christine R. Whittaker	Retired

CLERGY CANONICALLY RESIDENT IN MASSACHUSETTS 2017

Name	Clergy Job Duties
Rachel Wildman	Curate, St. Paul's, Bedford
Joseph W. Wilkes	Rector, St. Andrew's, Methuen
Monrelle T. Williams	Rector, St. Cyprian's, Roxbury
Sandra Williams	
Barbara S. Williamson	Rector, St. Elizabeth's, Sudbury
Donald R. Wilson	Retired
Robert G. Windsor	Retired; Co-Chair of the Chaplains to Retired Clergy, Spouses and Surviving Spouses
Diane Wong	Priest-in-Charge, St. John's, Arlington
Gloria L. Wong	Deacon; Retired
Colette Bachand Wood	Rector, All Saints', Whitman; Spiritual Coordinator and Chaplain, Norwell VNA and Hospice, Norwell
Priscilla Wood	Retired
J.C. Woods Jr.	Retired
James Christopher Woods	Retired
Deborah M. Woodward	Retired; Interim, St. John's, Franklin
Andrea C. Wyatt	
Deborah W. Little Wyman	
jimichael XIMENES-ENGELS	Retired
Bruce A. Young	Retired
Herbert B. Zalneraitis	Retired
Luther Zeigler	Priest Associate, St. John's, Beverly Farms; Vicar, Emmanuel Chapel, Manchester
Patricia Zifcak	Archdeacon for Deacons in Formation, Diocese of Massachusetts; Coordinator of Diocesan Diaconate Program

*Bishop's Annual Address
Convention of the Diocese of Massachusetts
Saturday, November 4, 2017
Cathedral Church of St. Paul, Boston*

A fable from the pen of Arnold Lobel:

The elephant and his son were spending an evening at home. Elephant Son was singing a song.

"You must be silent," said Elephant Father. "Your papa is trying to read his newspaper. Papa cannot listen to a song while he is reading his newspaper."

"Why not?" asked Elephant Son.

"Because Papa can think about only one thing at a time, that is why," said Elephant Father.

Elephant Son stopped singing. He sat quietly. Elephant Father lit a cigar and went on reading.

After a while, Elephant Son asked, "Papa, can you still think about only one thing at a time?"

"Yes, my boy," said Elephant Father, "that is correct."

"Well then," said Elephant Son, "you might stop thinking about your newspaper and begin to think about the slipper that is on your left foot."

"But my boy," said Elephant Father, "Papa's newspaper is far more important and interesting and informative than the slipper that is on his left foot."

"That may be true," said Elephant Son, "but while your newspaper is not on fire from the ashes of your cigar, the slipper that is on your left foot certainly is!"

Elephant Father ran to put his foot in a bucket of water. Softly, Elephant Son began to sing again. (i)

There are several ways in which I find this story altogether true.

- (1) Sometimes there are urgent matters which may not be the things which we had expected or necessarily hoped primarily to be focused upon, but which nonetheless are urgent in our day, and demand our response; some things are "on fire";
- (2) We actually have no choice but to be thinking, as best we can, about more than one thing at a time; and
- (3) In the end there will always be a song.

So let's think about more than one thing. I want to talk about several things, actually.

I

I want to say a word about restructuring in our diocesan staff. As you know from my announcement last month, several significant changes to our staffing structure are underway. Some of these have been driven by my own observations over the past three years, and priorities for the future. Some are driven by the mission strategy which we embraced last November. And some are driven by the reduction of the diocesan budget which has resulted from the new assessment formula. Let me comment on three of these staffing changes.

First, as you have heard, a new position of regional canon will be developed in 2018. Three regional canons will live and serve in areas encompassing four deaneries apiece—a north-and-western region; a central region; and a southern region. The regional canons will have three primary spheres of responsibility: transition ministry, with congregations undergoing leadership change, and with clergy discerning a new call; lay leader development in congregations, and exploration of new and varied models for such leadership; and promoting clergy wellness in ways that will complement the pastoral care of clergy already offered by your deanery deans.

These three tasks—clergy leadership transition, lay leader development and clergy wellness—are not randomly combined, but are integrally related one to another. The engagement of 60 congregations by each regional canon will enable these things to be addressed in ways that responsibility for 180 congregations has simply not allowed. The regional canons will be based not at 138 Tremont Street, but will spend their days out and about, learning, equipping, accompanying and supporting local ministries and collaborations. We will refine the descriptions in the next couple of months for a search over the winter and spring, and hope to have our new regional canons in place at the start of the summer.

A second new position is that of canon for immigrant and multicultural ministries. It has been my conviction since the earliest months of my traveling about in the diocese that we need to devote greater attention to how immigrant and multicultural ministries are supported in our life together. Our mission strategy likewise calls for “investing in ministries with communities of color and immigrant communities, drawing upon their unique strengths and supporting their health.” [Goal 7.c]

Census Bureau projections suggest that the population increase in this country over the next 30 years will be three to four times greater in immigrant communities than other sectors of our population. (ii) Our determination to focus on this aspect of our life in community, however, is not driven solely or I would say even primarily by opportunities for future growth and evangelism, significant though that may be. The fact is that already, now, from one end of our diocese to the other, we are a rich tapestry of Anglican-Episcopalians who worship in English, Spanish, Haitian Creole, Kiswahili, Dinka, Chinese and more. We need to celebrate, claim and nurture this aspect of our identity. For all the while we grieve the bitter ecclesiological divides in global Anglicanism, and try to find ways to bridge them, we have right here in eastern Massachusetts a microcosm of that Anglican Communion, with many bridges already built and much unity already to celebrate.

Time will not allow me to develop fully the many ways that I imagine this new position of canon for immigrant and multicultural ministries, starting next summer, can help us embrace more fully this rich aspect of our identity. But the increased importance which immigration issues have assumed in our collective lives this past year is I think self-evident. Some slippers are on fire, and this is one.

The third new position in a restructured staff will be a director of networking and training. Those who were here 10 years ago describe a time when, for various reasons, most commissions and committees in our diocese not mandated by canon were discontinued. In their place, leadership was delegated to staff members. Subsequent changes in budgets or priorities have left many of these areas without coordinated leadership. I want to suggest that our “de-staff-ification” of such leadership is not only a budgetary issue, but also a theological one. The gifts for such ministry lie in every corner of our diocese, in every part of the Body which together we constitute.

Our mission strategy named the desire to “connect and equip networks of lay people, clergy and staff members who share a passion for particular forms of service and public advocacy (such as feeding the hungry, supporting veterans, caring for elders, ending sex trafficking, eradicating gun violence or responding to addiction and substance abuse).” [Goal 5.b]

Several such networks have been taking shape. An emerging elder care network has proposed a resolution on today’s agenda, alongside another resolution by the long-established and vital network for creation care. An essential network for Christian formation has been gathering as well, and will help inform the balance of duties for the new director of networking and training, who will start some time in the spring.

One day last week I awoke to my clock radio and sat bolt upright when I heard Joe Mathieu on WGBH interviewing our deacon from Trinity Episcopal Church in Wrentham, which Joe Mathieu named, blessedly, at least three times. They were discussing the opiate addiction crisis, and Trinity's involvement in that matter. And how grateful we are to have the church profiled as an agent of health in this crisis and others. And we know there are many other congregations taking up this cross. And support from the new director of networking and training will help them and other such networks to find one another and to be better equipped to labor together.

II

I want to say a word about another aspect of our mission strategy. Goal 7.b committed us to “Entering into a large-scale, authentic and committed conversation about racism and other forms of oppression.” The implementation team did not engage that as one of their first three goals this year, in part because several diocesan efforts are already underway. To highlight just a few:

- The Racial Reconciliation and Social Justice Team has continued to provide trainings for diocesan and parish groups with “Seeing the Face of God.”
- Trinity, Boston invites all to the annual Bonnyman Symposium on matters of racial justice, this year (next weekend) exploring matters of inequity in health care.
- The Mission Institute accompanies numerous congregations in making the spiritual

commitment to the work of racial justice and reconciliation in their congregations.

- The Beloved Community Team at St. Stephen's, Lynn helped secure the Lynn police department's participation in implicit bias training this year.
- The Anti-Oppression Team of St. James's, Cambridge has invested in the creation of powerful liturgical experiences, including a unique Anti-Oppression Epiphany Service of Lessons and Carols, which will be shared for all here at our cathedral this year.
- Church of Our Savior, Milton, was a key partner in launching townwide, interfaith *Courageous Conversations for Racial Justice*.

And many more. These are just a few examples, and there will be many more as we continue to live into the commitment we have made to deepen and broaden our conversation and our action in this work of conversion of the heart.

III

I want to say a word about our budget, which is to say—one place where our treasure and heart are to be located.

The creation of the new positions that I described a moment ago of course necessitated the elimination of other positions. This is never an easy process, and I am deeply grateful to every staff member for his or her grace and patience in this transition. That process of restructuring was made more complex by the simultaneous need for staff reductions, necessitated by the change in the assessment formula. The bulk of the approximately \$400,000 reduction necessitated by that change came from staffing; a small portion also came from strategic ministry grants. Details are in the budget presentation.

The assessment formula reduction was a direct, good-faith response to what we heard last year in the mission strategy process. With many parishes facing their own budget reductions, our common resources need to be shepherded as carefully and responsibly as possible; and we're all striving "to do more with less." The cuts made were thoughtful and prudent. However, I must caution us against heading too far down a path that would hobble our capacity to maintain strong, commonly held resources and carry out together that which we cannot do alone. We articulated a grand vision a year ago in our mission strategy. We dreamed some big dreams, and embraced some cherished hopes. Now will not be the time to un-dream those dreams just as we begin to stretch towards them.

This plea for a strong financial commitment to our common life is not something that I have come to just because I am bishop. I understand that there can easily be the whiff of self-interest here. So I want to tell you that seven years ago in the Diocese of Ohio a resolution came before us proposing a drastic reduction in parish assessments. No parish in the diocese would have seen a larger windfall from the proposed reduction than the parish I then served. In the wake of the economic crisis of 2008-09, we had made in the parish deep cuts to staff and programs. We would have been thrilled to have that margin returned to us. But I was compelled to rise at convention that year to oppose the new formula.

I opposed those proposed Ohio cuts because I believed that economic hard times are precisely the times when strong, shared resources are vital. I believed that things like diocesan youth ministries, and facilities consultants, and resources for clergy wellness and investing in future leadership for the church—these things were essential. I believed that it was a privilege and a calling for congregations like mine to help assure that such resources were accessible to congregations of every size.

I opposed the proposed Ohio cuts because I felt certain that the reason we are Episcopalians and not Congregationalists is not just that we have a different take on mystery and sacraments, and love the rich liturgical tradition of Anglicanism—though we do. I believed that we are episcopalian and not congregationalist in our polity because we find in that polity a theological affirmation of the complementarity and wholeness of the larger body. I believed that Anglicanism’s historic affirmation of the diocese, and not the congregation, as the basic unit of the church is an expression of Saint Paul’s vision of the earthly body of Christ, made up of many parts.

I believed all those things in 2010 as a parish priest, and I believe them in 2017 as your bishop. These are the reasons we are committed to one another in heart and soul, and in treasure, too. These are the ways that, as we heard a moment ago in the Epistle, we grow *“into Christ, from whom the whole body, joined and knit together by every ligament with which it is equipped, ... promotes the body’s growth in building itself up in love.”* [Ephesians 4:15-16]

You know about sin, right? I mean, of course you know about sin. We all do. But you do know that sin is not really some list of naughty behaviors. Sin, *hamartia*, “missing the mark”—is all about separation. It’s all about separation. Our separation from God, and our separation from one another—even our separation from our own deepest, truest selves. So when we promise—as we do again and again—to resist sin, we are promising to reconnect things, to reconnect people, to build up the body in love, to effect Christ’s reconciliation.

This is the common thread in everything we do as Church, as the body of Christ, this is the common thread: reconciling reconnection. This is what undergirds our mission strategy when we vow to belong more deeply to one another. It undergirds the staff restructuring, which seeks to reconnect the center with the edges, and to reach across ethnic and cultural divides. Reconciling reconnection is what commits us to creation care, lest we persist in separating ourselves from our own planet’s well-being. It’s what commits us to justice in the face of racism’s tenacious, ugly sin.

Knitting the parts together. Joining the ligaments. Building up the body in love. This is our work as agents of Christ’s reconciliation. The work to which we rededicate ourselves.

IV

The year behind us has been challenging, and from the perspective of our national and global lives, often disheartening, indeed, exhausting. No doubt, those challenges will continue. But I am perpetually buoyed and encouraged by the faithful and committed Christian people of this diocese. In every corner, there is a spirit of devotion and delight, of servanthood and sacrifice.

Recently one of your colleagues brought to a meeting a piece written by Jonathan Daniels, the young seminarian from Cambridge and Keene, martyred in Alabama in 1965. I've read a lot about Jonathan Daniels. I'm not sure I had actually ever read anything that he'd written. The particular piece was published in the New Hampshire diocesan magazine two months before he died. Here's what he wrote:

This is the stuff of which our life is made. There are moments of great joy and moments of sorrow. ...There are good [people] here, just as there are bad [people.] There are competent leaders, and a bungler here and there. We have activists who risk their lives ... We have neutralists who cautiously seek to calm troubled waters. We have [those] about the work of reconciliation who are willing to reflect upon the cost and pay it. Perhaps at one time or another, [we] are all of these.

Sometimes we take to the streets, sometimes we yawn through interminable meetings. ... Sometimes we confront a posse, and sometimes we hold a child. Sometimes we stand with [those] who have learned to hate, and sometimes we must stand apart from them. ... [But] through the bramble bush of doubt and fear and supposed success we are groping our way to the realization that above all else, we are called to be saints. That is the mission of the Church everywhere. And in this, Selma, Alabama, is like all the world: it needs the life and witness of militant saints. (iii)

So my friends, for All Saints Sunday tomorrow, for the days and months ahead, in our diocese and beyond, may we strive to be just such saints, in the reconciling reconnections of Christ.

And like the elephant child, together we sing: "...there's not any reason, no, not the least, why I shouldn't be one too."

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(i) Arnold Lobel, *Fables* (New York: Scholastic Inc., 1980), p. 32.

(ii) Anthony Guillen, "On New, Multicultural Ministries," in *Following the Way of Jesus*, Michael Curry et al (New York: Church Publishing, 2017), p. 41.

(iii) Jonathan Myrick Daniels, "A Burning Bush," in *The New Hampshire Churchman: The Magazine of the Protestant Episcopal Church in the Diocese of New Hampshire*, June 1965, vol. XVII, No. 9.

**Minutes of the 232nd Annual Convention
of the Episcopal Diocese of Massachusetts
November 4, 2017
Cathedral Church of St. Paul, Boston, MA**

Holy Eucharist with the Bishop's Annual Address

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

Call to Order

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

Declaration of Constitutional Quorum

Bishop Gates recognized Mr. Leon A. Brathwaite II, Secretary, and he declared a constitutional quorum present for the 232nd Diocesan Convention.

Invitation to Honorary Seats

Bishop Gates recognized Ms. Rebecca Alden and Ms. Betsy Ridge Madsen of the Committee on Dispatch of Business. Ms. Alden 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.

Bishop Gates introduced and welcomed the Rev. Laura Everett, Executive Director of the Massachusetts Council of Churches.

Invitation to Special Seats

Ms. Alden moved:

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

The motion carried by majority voice vote.

Permission to Speak

Ms. Alden moved:

That permission be given for the following to have seat and voice to address the convention: Mr. George Chu, Ms. Leslie Davie, Ms. Katie Ernst, Ms. Louise Gant, Ms. Hilary Greene, Mr. Isaac Martinez, Mr. Kwame Ofori-Asante and Mr. Jim Scherer to speak during the Mission Strategy programs; and Mr. Jeff Tyrakowski to give the Compensation and Benefits Committee Report.

The motion carried by majority voice vote.

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

Ms. Madsen then moved for approval the Special Rules of Order as 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.

The motion carried by majority voice vote.

Ms. Madsen then moved and amendment to the Order of Business on page H-3 of the Handbook to include the Introduction of Nominees for Diocesan Elections before the Report of the Budget Committee.

The motion carried by majority voice vote.

Ms. Madsen then moved the Order of Business as amended.

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. The motion 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. Michael Bruce Curry, Presiding Bishop, and his wife, Mrs. Sharon Curry, and to the Rev. Gay Clark Jennings, President of the General Convention House of Deputies, and her husband, the Rev. Albert Jennings. He then recognized the retired Bishops Suffragan, the Rt. Rev. Barbara C. Harris and the Rt. Rev. Bud Cederholm. Bishop Harris 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.

Honors and Thanks

Bishop Gates offered thanks to the following people: to Mr. Leon Brathwaite, Secretary of the Diocese, and Ms. Lisa Garcia, Treasurer of the Diocese; the Rev. Pamela Werntz, outgoing member of the Standing Committee, for her years of service and wise counsel to the Bishops; the Rev. Deborah Warner, outgoing dean of the Cape and Islands Deanery, and for the newly appointed dean of the Cape and Islands Deanery, the Rev. Terry Pannell; the Rev. John Clarke, outgoing dean of the Mystic Valley Deanery, and for the newly appointed dean of the Mystic Valley Deanery, the Rev. Matthew Cadwell; to the staff, clergy and volunteer leadership in the diocese who have contributed to the development and implementation of this Convention, as well as the Cathedral staff and sextons.

Bishop Gates recognized the Rev. Clyde Elledge, the Rev. Amy McCreath, and the Hon. Byron Rushing, who will honor the Rev. Jane Gould, who is retiring and moving to California.

Bishop Gates honored Mr. Leon Brathwaite for his years of service as Secretary of the Diocese, as this will be his final year in this roll.

Welcome and Announcements

Bishop Gates recognized the Rev. Nancy Gossling to give the welcome and explain the evacuation plan in the event of an emergency.

Bishop Gates recognized the Hon. Byron Rushing, Parliamentarian, who reminded the convention that clergy and delegates 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 or proposed amendments to the Constitution and Canons will be read from the head table before voting. There are no “friendly amendments,” once an amendment has been seconded, it belong to the Convention. In the interest of respect and decorum, there should be no applause during debate and voting. Only canonically resident clergy and certified delegates (those wearing blue or pink nametags) may vote. Votes on the budget, assessments, clergy compensation and resolutions will be taken by use of the yellow and red voting cards given to clergy and delegates at registration. Votes on proposed amendments to the Constitution and Canons will be taken by orders by use of the yellow and red voting cards. With respect to amendments to budgets, additional funding of specific programs voted from the floor of the Convention shall be on the basis of new income allocated to the specific additional expense. Any person proposing additional program expenses must show evidence of the source of such funding.

Introduction of Nominees for Diocesan Elections

Bishop Gates recognized the Rev. Rachel Wildman, chair of the Committee on Elections, who explained the voting procedure according to the proportional representation method as well as electronic voting procedures. She then announced the nominees in contested elections and formally placed their names in nomination as follows:

Nominees for Clerical Alternates to the 2018 General Convention (three to be ranked): the Rev. Dr. Karen Coleman, the Rev. Debbie Phillips and the Rev. Canon William C. Parnell;

Nominees for Lay Alternates to the 2018 General Convention (two to be ranked): Ms. Betsy Ridge Madsen and Ms. Susannah Perkinson;

Nominees for Lay Member of the Cathedral Chapter (one to be elected): Mr. Kevin Miller, Mr. Paddy Cavanaugh and Ms. Betsy Munzer;

Nominees for Clerical Member of the Disciplinary Board (one to be elected): the Rev. Terry Pannell and the Rev. Mary Scott Miller.

Approval of the 2018 Diocesan Budget

Bishop Gates recognized Mr. Ted Ts’o, Chair of the Budget Committee, and Ms. Lisa Garcia, Diocesan Treasurer, to present the proposed 2018 Diocesan Budget and explain the budget process. They thanked all those involved in the preparation of the 2018 proposed budget, especially the members of the Budget Committee and diocesan staff. Mr. Ts’o then moved the following:

Resolved, that the 232nd Annual Convention of the Episcopal Diocese of Massachusetts approve the budget of revenue and expenses for 2018 as summarized on page 15, including the individual parish and mission assessments and approved adjustments for 2018 listed on pages 16-21.

The chair asked if there was any discussion.

The Rev. Adam Linton, Holy Spirit, Orleans, commended the work of the Budget Committee and all those involved in the budget process and expressed his wishes that assessment levels come down even further in the coming years.

The Rev. Edwin Johnson, St. Mary's, Dorchester; The Rev. Zenetta Armstrong, Holy Spirit, Mattapan spoke about their concerns for reduced funding for some of our strategic ministries, namely the BSAFE program.

The Rev. Kit Lonergan, St. James', Groveland, spoke about her concern for reduced funding in the Youth Ministry office.

Mr. Jeff Tyrakowski, Chair of the Compensation and Benefits Committee, reported that his committee was not consulted in the budget process and he expressed his concern at this lack of communication.

Mr. Steven Koehler, Holy Spirit, Orleans spoke against the proposed 2018 budget.

The Rev. Barbara Williamson, St. Elizabeth's, Sudbury; The Rev. Pam Werntz, Emmanuel, Boston; The Rev. Jane Bearden, Trinity, Haverhill; The Rev. Jeff Mellow, St. Paul's, Brookline; The Rev. Jennifer Phillips, St. John's, Westwood; Ms. Claudette Hunt, St. Andrew's, Ayer; The Rev. Beth Grundy, St. Peter's, Osterville spoke in favor of the proposed 2018 budget.

After discussion, the motion was voted.

Mission Strategy Program

Bishop Gates recognized the Rev. Nancy Gossling and the Rev. Joe Robinson, co-chairs of the Mission Strategy Implementation Organizing team, and other members of the team to lead the program.

Announcements & Noonday Prayer

Bishop Gates recognized Canon Bill Parnell, who gave the announcements about lunch. Noonday prayer was led by the Diocesan Music and Liturgy Commission.

Recall to Order

Following lunch, the Convention was recalled to order and Bishop Gayle Harris was seated as chair. Nancy Gossling reported that \$5,000 was collected during the offertory for Episcopal Relief and Development.

Mission Strategy Program

Bishop Harris recognized the Rev. Nancy Gossling and the Rev. Joe Robinson, co-chairs of the Mission Strategy Implementation Organizing team, and other members of the team to lead the program.

Bishop Harris recognized the Rt. Rev. Sylvestre Romero, who was present for Convention. Bishop Romero is currently serving in our diocese as interim at St. Peter's Church, Salem.

Report of the Compensation and Benefits Committee

Bishop Harris recognized Mr. Jeff Tyrakowski, Chair of the Compensation and Benefits Committee, who gave the report. The chair then recognized Ms. Carol Kingston who moved the Compensation and Benefits Committee's resolution regarding the clergy compensation standard and formula for 2018, as found on page H-14 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 2018 Guidelines.

The motion was voted.

Ms. Kingston then moved an amendment to the second resolve to correct an error in the published report (numbers to be taken out are stricken through and numbers to be added are bolded):

Resolved, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2018, is determined by the following formula:

*TCC Standard = \$71,035 + (~~141.77~~ **146.02** x Points) + \$500 x [years of service* within congregation]*

*Provided that the minimum TCC Standard for full-time parochial clergy is ~~\$75,288~~ **\$75,416**.*

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>+ <u>Average Current Sunday-Attendance</u></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) = [\$71,035 + (~~141.77~~ **146.02** x Points)] x 0.60*

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

*TCC Standard (assistant) = [\$71,035 + (~~141.77~~ **146.02** x Points)] x 0.65
+ \$350 x [years of service within the congregation]*

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

*TCC Standard (associate) = [\$71,035 + (~~141.77~~ **146.02** x Points)] x 0.75
+ \$375 x [years of service within the congregation]*

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

The amendment carried.

Ms. Kingston then moved the resolution as amended:

Resolved, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2018, is determined by the following formula:

$$\text{TCC Standard} = \$71,035 + (146.02 \times \text{Points}) + \$500 \times [\text{years of service}^* \text{ within congregation}]$$

Provided that the minimum TCC Standard for full-time parochial clergy is \$75,416.

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
+ Average Current Sunday-Attendance	x .30
= 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:

$$\text{TCC Standard (curate)} = [\$71,035 + (146.02 \times \text{Points})] \times 0.60$$

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

$$\text{TCC Standard (assistant)} = [\$71,035 + (146.02 \times \text{Points})] \times 0.65 + \$350 \times [\text{years of service within the congregation}]$$

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

$$\text{TCC Standard (associate)} = [\$71,035 + (146.02 \times \text{Points})] \times 0.75 + \$375 \times [\text{years of service within the congregation}]$$

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

The motion was voted.

Report of the Committee on Elections

Bishop Harris recognized the Rev. Rachel Wildman, Chair of the Committee on Elections. She announced the names of those running in uncontested elections who stood to be recognized: The Rev. Rebecca Black, Clerical Alternate Deputy to Provincial Synod; The Rev. Michael Hodges and Mr. Jonathan “Dutch” Treat, Board of Directors of the Barbara C. Harris Center; The Rev. Julie Carson, Clerical Member of the Standing Committee; Ms. Constance Perry, Lay Member of the Standing Committee; Ms. B. Judy Fenner and Ms. Julie Shea, Lay Members of the Disciplinary Board; The Rev.

Debbie Phillips, Clerical Member of the Cathedral Chapter; The Rev. Margaret Schwarzer, Member of the Trustees of Donations; Ms. Lisa Garcia, Treasurer of the Diocese and Mr. Leon A. Brathwaite II, Secretary of the Diocese.

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

Election Results

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

Clerical Alternates to the 2018 General Convention, as ranked:

The Rev. Dr. Karen Coleman

The Rev. Canon William C. Parnell

The Rev. Debbie Phillips

Lay Alternates to the 2018 General Convention, as ranked:

Ms. Betsy Ridge Madsen

Ms. Susannah Perkinson

Lay Member of the Cathedral Chapter:

Mr. Paddy Cavanaugh

Clerical Member of the Disciplinary Board:

The Rev. Mary Scott Miller

Announcement of Commission on Ministry Appointments

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

As of July 1, 2017, there were 41 people in the ordination process as postulants, candidates and transitional deacons – 29 for the priesthood and 12 for the diaconate. They come from 27 sponsoring congregations throughout eight deaneries in the diocese. From December 2016 through March 2017, six transitional deacons were ordained to the priesthood. In June 2017, six candidates were ordained transitional deacons.

Bishop Gates moved the following appointments:

Through Convention 2020: The Rev. Katherine Ekrem, The Rev. Miriam Gelfer, the Rev. Dr. Elizabeth Gibson, The Rev. Edwin Johnson and Mr. Graeme Mills.

The motion was seconded and voted.

Episcopal Youth Event Presentation

Bishop Harris was seated as chair recognized members of the Diocesan Youth Council to lead the presentation.

Report of the Committee on Constitution and Canons

Bishop Harris recognized the Rev. Mally Lloyd of the Committee on Constitution and Canons, who gave the report, moved and spoke to the following proposed amendments:

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

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

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

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

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

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

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

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

The chair asked if there was any discussion.

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

The amendments were voted by majority vote in each order.

Report of the Committee on Resolutions

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

1. Bishop Gates recognized the Rev. Laurie Rofinot who moved the following resolution, “We Are Still In: A Resolution to Fight Climate Change” found on page H-17 of the Handbook, and it was seconded:

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts affirms the leadership of Presiding Bishop and Primate of The Episcopal Church, The Most Reverend Michael Curry, in his June 1, 2017, response to President Trump’s decision to pull out of the 2015 Paris Climate Accord; and be it further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts praises the “We Are Still In” declaration in which hundreds of signatories pledge support of the goals of the Paris Climate Accord; and be it further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts joins with the United Church of Christ in living out the principles of the Paris Climate Accord by committing our time, financial resources and prayers to:

- *call on our congregations and every person of faith to set a moral example by making decisions of integrity in our energy choices and holding our leaders accountable to likewise reduce carbon emissions;*
- *call on our clergy and lay leaders to speak from the pulpit about our moral obligation to protect God’s creation; and*
- *call on our communities of faith to be bold and courageous in proclaiming the urgency of the climate crisis in the public square and at the local, state, and federal levels.*

Rev. Rofinot then moved the following amendment to be placed ahead of the first resolve:

Resolved, that the 232nd Annual Convention of the Diocese of Massachusetts send the following Memorial to the Deputies and Bishops of the Episcopal Church assembled at the 79th General Convention of The Episcopal Church.

Bishop Harris asked if there was any discussion.

The amendment carried by majority vote.

The Rt. Rev. Bud Cederholm then moved the resolution as amended:

Resolved, that the 232nd Annual Convention of the Diocese of Massachusetts send the following Memorial to the Deputies and Bishops of the Episcopal Church assembled at the 79th General Convention of The Episcopal Church; and further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts affirms the leadership of Presiding Bishop and Primate of The Episcopal Church, The Most Reverend Michael Curry, in his June 1, 2017, response to President Trump’s decision to pull out of the 2015 Paris Climate Accord; and be it further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts praises the “We Are Still In” declaration in which hundreds of signatories pledge support of the goals of the Paris Climate Accord; and be it further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts joins with the United Church of Christ in living out the principles of the Paris Climate Accord by committing our time, financial resources and prayers to:

- *call on our congregations and every person of faith to set a moral example by making decisions of integrity in our energy choices and holding our leaders accountable to likewise reduce carbon emissions;*
- *call on our clergy and lay leaders to speak from the pulpit about our moral obligation to protect God’s creation; and*
- *call on our communities of faith to be bold and courageous in proclaiming the urgency of the climate crisis in the public square and at the local, state, and federal levels.*

Those who spoke in favor of the resolution included: The Rev. Deborah Warner, Messiah, Woods Hole and Ms. Dawn Teserero, St. John’s, Jamaica Plain.

Ms. Lallie Lloyd, St. Mary’s, Barnstable called the question and debate ended.

The motion, as amended, carried by majority vote.

2. Bishop Harris then recognized Mr. Vic Kingsley who moved the resolution “A Resolution to Encourage the Formation of a Network of Congregations and Individuals Engaged in Elder Ministry in the Episcopal Diocese of Massachusetts” found on page H-20 of the Handbook, and it was seconded:

Resolved, that the 232nd Diocesan Convention, in the spirit of a resolution passed at the 2011 Diocesan Convention urging congregations to identify and share the needs and services of elders in their community, and in accordance with the Christian imperative to uphold the value of every life through the continuum of life and to continually seek to extend the love of Christ to those who are at risk of disenfranchisement, encourages the formation of a network of congregations and individuals to:

1. *meet the growing and diverse needs of aging adults*
2. *reframe negative stereotypes of aging*
3. *promote avenues for meaningful engagement and spiritual sustenance throughout life; and be it further*

Resolved, that this network be dedicated to offering practical support to aging individuals and caregivers regarding issues such as: transitions in housing and family life, age-specific spiritual care and adult faith formation, grief and loss, caregiver support, Alzheimer’s and dementia care, elder rights advocacy, end of life conversations, hospice and palliative care, and isolation; and be it further

Resolved, that this network develop resources and training to support clergy and lay leaders in addressing the needs of their aging congregants.

Mr. Kingsley spoke to the resolution.

Bishop Harris asked if there was any discussion.

Those who spoke in favor of the resolution included: The Rev. Colette Wood, All Saints', Whitman.

The motion was carried by majority vote.

Resolution in Response to the Bishop's Address

Bishop Harris recognized the Rev. Holly Antolini, who moved the following:

Whereas, called by “@MassBishopXVI,” as we restructure and “de-staffify,” as we live into the vision of our Mission Strategy, we draw upon the vitality of our strong shared resources, stretching toward new dreams of God, drawing upon the gift of being a tapestry of cultures - a microcosm of the Anglican Communion - accompanying each other as we create a diocese-wide Episcopalian learning community, therefore be it

Resolved, that we rededicate ourselves to the work of radical reconnecting, groping our way toward becoming militant saints, knitting the parts together where every ligament promotes the Body's building itself up in love. Through it all, may the fire be in our hearts and not on our slippers!

The motion carried by acclamation.

Clergy Introductions

Bishop Gates was seated as chair and introduced the transitional deacons and priests newly ordained since Convention 2016, as well as clergy who have become canonically resident or licensed and those who have retired since Convention 2016.

Other Introductions

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

Closing and Adjournment

All legislative matters were concluded and Bishop Gates led a closing prayer. He then called for a motion to adjourn at 3:15pm. It was seconded and voted.

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

Handbook

232nd Annual Convention of the Episcopal Diocese of Massachusetts

Cathedral Church of St. Paul, Boston



CALL TO THE CONVENTION
NOTICE OF THE 232nd ANNUAL SESSION OF THE CONVENTION
OF
THE EPISCOPAL DIOCESE OF MASSACHUSETTS

In accordance with Article 3, Section 3 of the Constitution of the Diocese of Massachusetts, I hereby issue the formal call for the two hundred thirty-second annual session of the Convention of the Diocese of Massachusetts, which will begin at eight o'clock in the morning, at the Cathedral Church of St. Paul, Boston, Massachusetts.

LEON A. BRATHWAITE II

Secretary of Convention

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ORDER OF BUSINESS

- 7:00 a.m. REGISTRATION and ELECTRONIC VOTING opens in Sproat Hall
- 8:15 a.m. HOLY EUCHARIST with BISHOP'S ADDRESS
Preaching: The Rt. Rev. Alan M. Gates
Celebrating: The Rt. Rev. Gayle E. Harris
- 9:45 a.m. CALL TO ORDER OF LEGISLATIVE SESSION
Declaration of Constitutional Quorum
Invitation to Honorary/Special Seats
Permission to Speak
Report of the Committee on Dispatch of Business
Acceptance of the Special Rules of Order (H-4)
Receiving of Reports by Title: 2017 Journal
Report of the Qualifications Committee
Greetings and Good Wishes
Honors and Thanks
Announcements
- 10:15 a.m. Report of the Budget Committee
Vote on Proposed 2018 Diocesan Budget
- 11:15 a.m. Mission Strategy Program
- 11:45 a.m. Noonday Prayer and Lunch
- 1:00 p.m. *Electronic Voting Closes*
- 1:05 p.m. RECALL TO ORDER
- 1:10 p.m. Mission Strategy Program
- 2:30 p.m. Report of the Elections Committee
Report of the Compensation and Benefits Committee
Approval of Commission on Ministry Appointments
- 2:45 p.m. Episcopal Youth Event Presentation
- 3:00 p.m. Report of the Committee on Constitutions and Canons
Report of the Resolutions Committee
Resolution in Response to the Bishop's Address
- 3:30 p.m. Introduction of New and Retired Clergy
Other Introductions: Life Together 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 CLERICAL ALTERNATES to 2018 GENERAL CONVENTION

(3 nominees, 3 to be ranked) *Nominees listed in random order as they will appear on the ballot.*



The Rev. Dr. Karen Coleman

Acting Chaplain, Boston University
St. James' Church, Somerville

I've been blessed in my time as a university chaplain and rector of a diverse urban parish to be available to engage and minister to a variety of people. We come together at General Convention to hold all that we have as Episcopalians deeply rooted in our faith and our love of Jesus Christ and to carry that out into the wider church and world. I serve on Diocesan Council, Province I and Disciplinary Board.

The Rev. Debbie Phillips

Grace Church, Salem

Since my college days at BU, the Diocese of Massachusetts has informed my faith and helped raise me as a leader. This is a time in our country when our leadership is greatly needed. Through service on various councils and as a priest in four parishes here, I have seen the profound impact we have on issues of justice. It would be my privilege to continue this work at General Convention.



The Rev. Canon William C. Parnell

Canon to the Ordinary, Diocese of Massachusetts

It's a joy to serve our diocese as we live into a new mission strategy uniquely expressed in each congregation. It's a story worth sharing at General Convention and there is much we can learn from other dioceses as well. Newark alt. deputy 2006, 2009; attended with NY deputation as bishop's staff 2012, 2015. Twenty-two years as parish priest; developed local, regional, global, and multi-faith partnerships; 7 years' service to congregations at the diocesan level.

Nominees for LAY ALTERNATES to 2018 GENERAL CONVENTION

(2 nominees, 2 to be ranked) *Nominees listed in random order as they will appear on the ballot.*

Ms. Betsy Ridge Madsen
Church of the Advent, Boston

Currently on Diocesan Council and co-convenor of the Boston Harbor Deanery, I seek to serve you as an experienced (prior deputy/alternate six terms) and continued resource for our deputation. I hope, gathering in the name of Jesus, we can listen faithfully, create good legislation, be harbingers of hope, peace and justice, and be good stewards of the environment. Active in my parish, I teach at the Epiphany School, Dorchester (20 years).



Ms. Susannah Perkinson
Church of St. John the Evangelist, Duxbury

This is a wonderful time to be a part of the Episcopal Church and how we live into God's dream for our world. I have served at five General Conventions – four as a deputy serving on various committees, most recently Program, Budget and Finance. At the last General Convention, I was the recording secretary for the House of Deputies. I am committed to building connections between the work of the wider church and our diocese.

Nominees for LAY MEMBER of the CATHEDRAL CHAPTER

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

Mr. Kevin Miller

Epiphany Church, Walpole

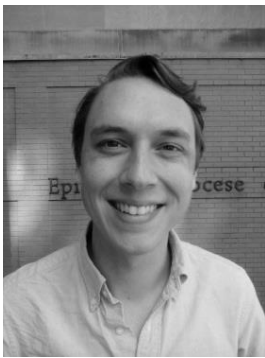
I am currently serving on a vestry that has made great strides to improve parish life and morale. If elected to the Cathedral Chapter, I will bring my experience as a listener to the table, hearing all sides of situations. I will ask the questions that need to be asked, and I will work with the team to implement our decisions.



Mr. Paddy Cavanaugh

Emmanuel Church, Boston

The Cathedral is a spiritual home to me where I have been afforded rich opportunities to serve our diocese. Coordinating our march in Pride, collaborating with MANNA for Holy Week, and leading a small, but faithful morning prayer group in the chapel has shown me that the Cathedral ministry is public ministry and Boston is our Galilee. I seek to bring this vision to chapter, contributing to its transforming work at the heart of our diocese.



Ms. Betsy Munzer

St. Paul's Church, Brookline

I have served on Cathedral Chapter for more than eight years, participating on the finance, development and space use committees. I also serve as Trustee with the Trustees of Donations. My contribution to the capital campaigns of the diocese and Cathedral has been substantial.



Nominees for CLERICAL MEMBER of the DISCIPLINARY BOARD

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



The Rev. Terry Pannell
St. Mary of the Harbor, Provincetown

It has been a privilege to serve the church as a representative to Diocesan Council, as co-convenor of the Cape and Islands Deanery Assembly, and for the past 11 years, as rector of St. Mary of the Harbor. As someone who is concerned with the health of the church, I bring both a pastoral sensitivity and a commitment to addressing conflict in a faithful and constructive way that fosters healing and reconciliation.

The Rev. Mary Scott Miller
Christ Church, Needham

My legal training (trial and employment) may be of some use in this position, as may my having served on the Constitution and Canons Commission of our diocese. I have also been active in the diocese and have knowledge of our diocese and its parishes and other ministries. More importantly, I understand the healing that comes from telling the truth and balancing justice and mercy, and a belief that reconciliation is possible and grace abounds.



UNCONTESTED ELECTIONS
The following nominees were unopposed.

Alternate Clerical Deputy to Provincial Synod

The Rev. Rebecca Black, Christ Church, Waltham (3-year term)

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

The Rev. Michael Hodges, Christ Church, Andover (3-year term)

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

Clerical Member of the Standing Committee

The Rev. Julie Carson, St. Andrew’s Church, Framingham (4-year term)

Lay Member of the Standing Committee

Ms. Constance Perry, Trinity Church, Boston (4-year term)

Lay Members of the Disciplinary Board

Ms. B. Judy Fenner, St. Peter’s Church, Osterville (3-year term)

Ms. Julie Shea, St. John’s Church, Winthrop (3-year term)

Clerical Member of the Cathedral Chapter

The Rev. Debbie Phillips, Grace Church, Salem (3-year term)

Trustees of Donations

The Rev. Margaret Schwarzer, St. Andrew’s Church, Wellesley (5-year term)

Treasurer of the Diocese

Ms. Lisa Garcia, Parish of the Epiphany, Winchester (1-year term)

Secretary of the Diocese

Mr. Leon A. Brathwaite II, St. Andrew’s Church, Edgartown (1-year term)

POSITIONS WITHOUT NOMINEES

Clerical Alternate to 2018 General Convention

1 to be appointed for a 3-year term

Lay Alternate to 2018 General Convention

2 to be appointed for 3-year terms

Lay Alternate Deputy to Provincial Synod

1 to be appointed for a 3-year term

ELECTION WORKSHEET

THIS IS NOT A BALLOT

This year, voting for positions to be filled by election will be done electronically. Voting stations will be set up in Lower Sproat Hall and volunteers will be on site to help you through the process. Voting will be open from 7:00 am until 1:00 pm. Clergy and Lay Delegates are welcome to vote any time during this period.

Listed below in random order are the names of nominees for diocesan elections. Please refer to pages H-5 through H-8 for nominees' descriptive statements. This worksheet is meant to guide you through the electronic voting process. You may bring this sheet with you when you vote.

In accordance with proportional representation, indicate your RANK preference for each nominee (1 for first preference, 2 for second preference, etc.) between the parentheses after the nominee's name. An example is provided.

EXAMPLE: BEST JELLY BEAN FLAVOR (3 nominees, 3 to be ranked)

Blueberry	(2)
Buttered Popcorn	(1)
Rootbeer	(3)

CLERICAL ALTERNATE to GENERAL CONVENTION (3 nominees, 3 to be ranked)

The Rev. Dr. Karen Coleman	()
The Rev. Debbie Phillips	()
The Rev. Canon William Parnell	()

LAY ALTERNATE to GENERAL CONVENTION (2 nominees, 2 to be ranked)

Ms. Betsy Ridge Madsen	()
Ms. Susannah Perkinson	()

LAY MEMBER of the CATHEDRAL CHAPTER (3 nominees, 1 to be elected)

Mr. Kevin Miller	()
Mr. Paddy Cavanaugh	()
Ms. Betsy Munzer	()

CLERICAL MEMBER of the DISCIPLINARY BOARD (2 nominees, 1 to be elected)

The Rev. Terry Pannell	()
The Rev. Mary Scott Miller	()

REPORT OF THE COMPENSATION AND BENEFITS COMMITTEE OF THE DIOCESAN COUNCIL

Purpose of Committee

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

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

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

Goals for the Committee

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

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

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

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

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

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

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

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

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

Summary of Committee Work in 2017

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

The committee has reviewed the health plan renewal options provided by the Medical Trust for 2018. The rate increase for the coming year for the current CIGNA plans is set at 6.5% across all options, after increasing by 5.5% for 2017. The Medical Trust reports paying out in excess of 90% of premiums received directly in benefits, which is consistent with what it has reported in the past. It has been the policy of the committee to establish a congregation's mandate for payment of premiums on "the lowest cost comprehensive plan" available to us through the Medical Trust in accordance with General Convention Resolution A177. Given the change in our mandated base plan – to the CIGNA Open Access Plus plan (code MGOP) beginning in 2013 – the cumulative increase in the base premium to parishes since 2010 is 30%. We point this out because the majority of our enrollees (about 70%) remain in the Open Access Plus In-Network plan (code MGIN) – down from 75% last year. This plan's premiums are up 62% over that same period of time.

The committee has recommended that the existing plan options be maintained, as well as offer alternative options for 2018. As mentioned last year, alternative (and lesser) plan designs were offered by the Medical Trust – including plans at the "Silver" metallic level (as designated by the Affordable Care Act). We have chosen to adopt an expanded base of offerings, in part due to plan design and vendor changes we expected to be implemented by the Medical Trust for 2019. The CIGNA options remain available to us for a final year of 2018, at which point they will be replaced by Anthem Blue Cross plans exclusively.

Members of the committee have taken part in events sponsored by the Church Pension Group (CPG) during the year, including the Benefits Partnership Conference which was held in May. One focus of the conference was the changes set to go into effect January 2018 to the pension plan in light of changes in the life and demographics of the church. For further information the committee recommends the 2015 Church Compensation Report published in July 2017 and the new provisions regarding Total Assessable Compensation published in the spring of 2017, both available at www.cpg.org.

These publications have extensive information on median clergy salary levels nationally as well as pension calculations based on this effect. The committee is increasingly aware of the

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

Throughout the fall, the committee conducted its annual survey of parochial clergy salaries, the results of which will be published in the 2018 Guidelines. As we have reported previously, our approach to Total Clergy Compensation (TCC) is fairly unique and has successfully avoided placing clergy compensation into tiers based strictly upon parish size (as you will notice the above mentioned Compensation Report does). The TCC approach has also succeeded in one of its stated goals of raising the general level of salaries over time since its implementation in 2001, while also taking into account variables such as operating budgets and pledging units. The committee would like to emphasize that the annual adjustment to the TCC Standard (minimum) calculation is not a “Cost of Living Adjustment” (COLA). Rather, it is a method of ensuring the promotion of a reasonable standard of living in the context of a parish’s financial capacity. Whether or not any salary adjustment is actually made in the coming year, we encourage all parishes to use the TCC “Worksheet” and calculate their TCC Standard annually.

Consistent with our charge, recent history and survey data gathered each year, the Compensation and Benefits Committee again recommends a 3% increase in the Total Clergy Compensation Standard for 2018.

Members of the Committee

Ms. Cynthia Cushman
The Rev. Gretchen S. Grimshaw
The Rev. Megan Holdings
Ms. Carol Kingston
Paige Manning, Esq.

The Rev. Dr. Jean Baptiste Ntagengwa
The Rev. Andrew J. Stoessel
Mr. Jeff Tyrakowski, Chair
The Rev. Harry Walton
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 2018 Guidelines.

Resolved, that the TCC Standard be defined as the minimum TCC for active full-time parochial clergy and, for the calendar year 2018, is determined by the following formula:

$$\text{TCC Standard} = \$71,035 + (141.77 \times \text{Points}) + \$500 \times [\text{years of service* within congregation}]$$

Provided that the minimum TCC Standard for full-time parochial clergy is \$75,288.

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:

$$\text{TCC Standard (curate)} = [\$71,035 + (141.77 \times \text{Points})] \times 0.60$$

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

$$\begin{aligned} \text{TCC Standard (assistant)} &= [\$71,035 + (141.77 \times \text{Points})] \times 0.65 \\ &+ \$350 \times [\text{years of service within the congregation}] \end{aligned}$$

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

$$\begin{aligned} \text{TCC Standard (associate)} &= [\$71,035 + (141.77 \times \text{Points})] \times 0.75 \\ &+ \$375 \times [\text{years of service within the congregation}] \end{aligned}$$

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

REPORT OF THE COMMITTEE ON CONSTITUTION AND CANONS

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

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

The Constitution and Canons Committee is reporting one item for action by Convention, the text of which appears on the following page.

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

This amendment was submitted to Convention last year and was passed by a voice vote in both the lay and clergy orders. If approved at this Convention without amendment in both the lay and clergy orders, it will become effective.

The committee recommends approval of this amendment on second reading.

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

As approved at Diocesan Convention 2016

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

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

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

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

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

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

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

REPORT OF THE COMMITTEE ON RESOLUTIONS

The committee presents two resolutions, found to be in order in the following form and hereby submitted to the 232nd Convention of the Episcopal Diocese of Massachusetts for consideration.

1. We Are Still In: A Resolution to Fight Climate Change

Submitted by: The Rev. Jane B. Bearden, The Rev. William Bradbury, The Rt. Rev. Bud Cederholm, The Rev. Timothy E. Crellin, The Rev. Maggie Geller, The Rev. Elizabeth Good, The Rev. Amy McCreath, Mr. Kevin Miller, The Rev. Chris Morck, The Rev. Barbara A. Peterson, The Rev. Dr. Jennifer Phillips, The Rev. Laurie Rofinot, The Rev. Barbara Smith-Moran, Ms. Dawn Tesorero, The Rev. Evan Thayer, The Rev. Deb Warner, Ms. Sylvia Weston and Ms. Lauren Zook

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts affirms the leadership of Presiding Bishop and Primate of The Episcopal Church, The Most Reverend Michael Curry, in his June 1, 2017, response to President Trump's decision to pull out of the 2015 Paris Climate Accord; and be it further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts praises the "We Are Still In" declaration in which hundreds of signatories pledge support of the goals of the Paris Climate Accord; and be it further

Resolved, that the 232nd Convention of the Episcopal Diocese of Massachusetts joins with the United Church of Christ in living out the principles of the Paris Climate Accord by committing our time, financial resources and prayers to:

- call on our congregations and every person of faith to set a moral example by making decisions of integrity in our energy choices and holding our leaders accountable to likewise reduce carbon emissions;
- call on our clergy and lay leaders to speak from the pulpit about our moral obligation to protect God's creation; and
- call on our communities of faith to be bold and courageous in proclaiming the urgency of the climate crisis in the public square and at the local, state, and federal levels.

Explanation

The scientific evidence continues to be overwhelming that climate change is real and caused by humans. Its effects are already manifest in the severity and frequency of extreme weather events around the world that disproportionately affect the poor. Almost all scientists agree that we must stabilize the global mean temperature increase to 2° Celsius to avoid catastrophe by instituting significant reductions in global levels of carbon emissions.

In his June 1 statement¹, The Most Reverend Michael Curry calls on the Episcopal Church to continue to take bold action to address the climate crisis, reminding us that we are all trustees and stewards of God's good creation.² The Diocese of Massachusetts has been a leader within the Episcopal Church and our communities in urging divestment of our financial resources

1 <https://www.episcopalchurch.org/posts/publicaffairs/presiding-bishop-presidents-action-and-paris-climate-accord>

2 Genesis 1:26-31

from fossil fuel companies and re-investment in carbon-free sources of energy, both with our direct financial investments and in the structures of our houses of worship. We must continue to do so. We are still striving to meet the goals of the Genesis Covenant passed by General Convention in 2009 and affirmed by Diocesan Convention in 2010. The full statement of the Covenant is: “Resolved, the House of Deputies concurring, that the 76th General Convention of the Episcopal Church affirms that The Episcopal Church become a signatory to the Genesis Covenant, thereby making a public commitment to work to reduce greenhouse gas emissions from every facility it maintains by a minimum of 50% within 10 years” (i.e. by 2019). The Creation Care Initiative is the diocesan response to this covenant, having already helped about 100 of our congregations with over \$900,000 in grants and \$500,000 in loans. This support of the efforts of our congregations should continue.

The “We Are Still In”³ declaration in support of the Paris Accord has so far been signed by the mayors of more than 200 American cities, governors of numerous states, leaders of hundreds of American companies, and many university presidents. They pledge to “pursue ambitious climate goals, working together to take forceful action and to ensure that the US remains a global leader in reducing emissions.”

On June 2, 2017, Bishop Doug Fisher of the Diocese of Western Massachusetts and the Rev. Dr. Jim Antal, Conference Minister and President of the United Church of Christ in Massachusetts, also condemned President Trump's decision to abandon the Paris Climate Accord by signing a statement “An Opportunity for Which the Church Was Born.”⁴ This ecumenical statement, also passed by the leadership of the national UCC Church, affirms, “Our Judeo-Christian heritage teaches that the Earth and its web of life are precious in God’s sight, that the Earth belongs not to us but to God, and that we are entrusted with loving the Earth as God loves it.”⁵ As followers of Jesus, we are committed to God’s mission of reconciling people with each other and with the whole of creation.” They added, “[The President’s] decision is scientifically, economically, medically, politically and morally wrong. With heartache we recognize the devastating toll of suffering that will be exacted by this Administration’s refusal to address the climate crisis. We are appalled by the Administration’s unwillingness to join with other nations in protecting and stabilizing the atmosphere upon which our species – and so many other forms of life – depend.” We fully concur.

We must, therefore, in the three-fold challenge of the UCC resolution, “accept the mantle of moral leadership, strive for incarnate change, and proclaim the truth of climate change in the public square.” The alternative is devastating to contemplate.

Statement Against

The dangers of climate change have been exaggerated. Climate change is a naturally occurring phenomenon, not a human-made crisis.

Even if the world is facing a climate crisis, these are not helpful solutions. The Paris Accord is deeply flawed, and its virtues do not compensate for the loss of American jobs and money. Climate change is driven primarily by large corporations, and focusing on individual or even parish energy choices is an empty gesture. Many environmental initiatives, in church and

³ www.WeAreStillIn.org

⁴ <http://www.macucc.org/newsdetail/opportunity-for-which-the-church-was-born-8390216>

⁵ Genesis 1-2:3, Psalm 24, and Genesis 2:15

government, disadvantage those with fewer resources, and it is irresponsible to encourage advocacy and action without attention to that fact.

Moreover, this resolution is clearly political, which violates the separation of church and state. The work of the Church is to proclaim the love of Christ, not to pass partisan resolutions that can only serve to widen the painful divisions among us.

Implementation Requirements

The volunteer Creation Care Task Force will be revived to implement this resolution by working with the diocese and its clergy, lay leaders, and green committees to:

- resist all expansion of fossil fuel infrastructure and demand new sources of renewable energy that are accessible to all communities and do not depend on fossil fuels or on wealth for the few and misery for the many;
- identify and supply speakers, films, and programs that promote creation care;
- renew efforts to seek a variety of funding sources for the loan and grant programs of the Creation Care Initiative in order to “respond to the moral crisis of climate change,” as stated on page 10 of the Diocesan Mission Strategy.⁶
- continue to work with the many congregations who have reduced their carbon emissions by 10% - 70% and are eager to partner with congregations who wish to reduce their emissions and learn from others who have; and
- sponsor and publicize a program for creation tithing, which sets goals for houses of worship and their members to reduce greenhouse emissions by 10% *each* year through a focus on the worst consumer-generated emitters: heating oil, natural gas, electricity, water and automobile fuel.

⁶ http://www.diomass.org/webfm_send/3870

2. A Resolution to Encourage the Formation of a Network of Congregations and Individuals Engaged in Elder Ministry in the Episcopal Diocese of Massachusetts

Submitted by: The Rt. Rev. Bud Cederholm, The Rev. Colette Wood, The Rev. Phil Flaherty, The Rev. Cynthia Hubbard, The Rev. Chris Beukman, Ms. Annette Nicolas, Ms. Regina Gurney, Ms. Judy Fenner and Mr. Vic Kingsley

Resolved, that the 232nd Diocesan Convention, in the spirit of a resolution passed at the 2011 Diocesan Convention urging congregations to identify and share the needs and services of elders in their community, and in accordance with the Christian imperative to uphold the value of every life through the continuum of life and to continually seek to extend the love of Christ to those who are at risk of disenfranchisement, encourages the formation of a network of congregations and individuals to:

1. meet the growing and diverse needs of aging adults
2. reframe negative stereotypes of aging
3. promote avenues for meaningful engagement and spiritual sustenance throughout life; and be it further

Resolved, that this network be dedicated to offering practical support to aging individuals and caregivers regarding issues such as: transitions in housing and family life, age-specific spiritual care and adult faith formation, grief and loss, caregiver support, Alzheimer's and dementia care, elder rights advocacy, end of life conversations, hospice and palliative care, and isolation; and be it further

Resolved, that this network develop resources and training to support clergy and lay leaders in addressing the needs of their aging congregants.

Explanation

According to national Episcopal Church research, more than one in three Episcopalians right now are over the age of 65, and life expectancy for Americans continues to increase. The statistics forecast more adults living longer with the subsequent potential for increased existential and spiritual challenges and, therefore, need for support and meaningful engagement with their worshipping community. Addressing these concerns, the 2009 General Convention passed a resolution that created a Task Force for Older Adult Ministries. Additionally, the Diocese of Massachusetts passed a resolution in 2011 to generate greater awareness of issues elders in our communities face.

This new resolution calls for the creation of a network within our diocese to address these concerns through the use of existing resources, such as the curriculum developed by the Plymouth, Cape and Islands (PCI) Mission Hub, and resources produced by the Task Force for Older Adult Ministries, and the development of new resources. Over the past year in our diocese, 20 individuals – lay and ordained – possessing a passion and expertise in elder care have loosely connected to share strategies that support the well-being and spiritual health of older adults and their families. The proposed network would utilize this existing core group to develop relationships with appropriate community-based resources, and supply congregations with educational presentations and training, prayer and worship guidelines, and pastoral visitation suggestions, thus ensuring that clergy/parish support is consistent, relevant and readily accessible. The continuing network would serve as a faith-based complement to existing social services.

Statement Against

There would be duplication of services and competition for resources with state agencies like Councils on Aging working in communities under the Massachusetts Office of Elder Affairs. In addition, the Office of Elder Affairs already provides the necessary access to the Dementia Friendly Massachusetts Initiative. Parishes of this diocese therefore already have access to these resources.

Implementation Requirements

- Assignment of a diocesan liaison to support the network regarding structure, leadership and goals.
- Development of funding resources.
- Recruitment of congregational volunteer coordinators.

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

2017

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

Dispatch of Business

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

Qualifications

Mr. Jeffrey Bishop
The Ven. Michael Hamilton
Ms. Hazel Johnson
Ms. Suzette Phillips

Constitution and Canons

The Rev. Terry Hoffman
Ms. Bernie Jones
The Rev. Mally Lloyd

Elections

The Rev. Amanda March
Ms. Susannah Perkinson
The Rev. Harry Walton
The Rev. Rachel Wildman

Resolutions

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

Admission of Parishes and Missions

The Rev. Rebecca Black
Mr. Spencer Alphonso Felder
The Rev. Regina Walton

Convention Steering Committee

Mr. Leon Brathwaite II
Ms. Ethel Crawford
The Rev. Nancy Gossling
Ms. Claudette Hunt
The Rev. Edwin Johnson
Ms. Ellen Kittle
Mr. Lynd Matt
The Rev. Karen Montagno
The Rev. Canon Bill Parnell
Ms. Suzette Phillips
Mr. Jamie Reamer
The Rev. Joe Robinson
Ms. Laura Simons
Ms. Tracy Sukraw

NOTES

2018 Diocesan Budget

proposed to the
232nd Annual Convention of the Episcopal Diocese of Massachusetts
Cathedral Church of St. Paul, Boston



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Budget Committee

(Term ends in November of the year listed)

Lisa Garcia (2017), Treasurer

Matthew Cadwell (2017)

Ellen Sheehy (2017)

Barbara Williamson (2017)

Virginia Rogers (2018)

Ted Ts'o (2018), Chair

Adam Linton (2019)

Betsy Ridge Madsen (2019)

Lynn Smith (2019)

Charles Jordan, Controller

William Parnell, Canon to the Ordinary

Laura Simons, Assistant Secretary

Gerry Sullivan, Chief Business Officer and Assistant Treasurer



Episcopal Diocese of Massachusetts

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Dear Friends in Christ,

This booklet presents the proposed budget for the Episcopal Diocese of Massachusetts for the calendar year 2018. Our goal is to provide you clarity and transparency with regard to the annual operations, strategic initiatives and financial health of our diocese. Along with detailed charts showing the numbers, we have included a narrative which explains the budget process and individual line item descriptions.

At last year's Annual Convention, after an intensive listening process, we adopted a new mission strategy which will guide our common life in the coming years. The mission strategy provides guidance for the use of all our financial resources and helps to set our strategic priorities. This year the Diocesan Council has proposed a new tiered formula for assessments through which nearly every congregation will see a lower percentage contribution when compared to the previous formula, leaving more resources to be used locally for the Church's mission. These two developments have demanded that we address our mission aspirations with fewer resources at the diocesan level. With the guidance of Bishop Gates, a new structure for diocesan staff and program will be implemented in the coming year to align with our newly articulated mission priorities. A more robust process for evaluating existing strategic ministries and identifying new ones has begun to take shape and will continue to be developed in the coming year. And while this year has given us the challenge of turning those realities into a balanced budget, we are persuaded that this is an opportunity to respond to God's abundant gifts with our good stewardship.

The process of putting together a budget of this size and complexity is rewarding, humbling and imperfect. It is a point-in-time picture of how we seek to carry out God's mission in ever-changing circumstances. We want to thank Canon to the Ordinary Bill Parnell, Chief Business Officer Gerry Sullivan, Controller Charlie Jordan, Assistant Secretary Laura Simons, the members of the Budget Committee and the Diocesan Council for their dedication and guidance in crafting this budget. We have been inspired by the creative ministries we undertake together as people of God in eastern Massachusetts and beyond. We are grateful to Bishop Gates and Bishop Harris for their clarity about our mission priorities and their support throughout this process.

Our prayer is that each of us will be keenly aware of God's abundance as it has been entrusted to us, and ready to employ those gifts in the name of Christ as his disciples.

Faithfully yours,

Lisa Garcia
Treasurer

Ted Ts'o
Chair, Budget Committee

BUDGET OVERVIEW

Process

The Budget Committee, established by Diocesan Council to help prepare the annual budget, met monthly, held three hearings in May to hear from representatives of strategic ministries and held one open budget hearing in June. In late February, Council directed the Assessment Formula Review Committee to develop a formula that would reduce the aggregate assessment income by 10%. The Assessment Formula Review Committee worked throughout late winter and the spring to devise a new formula, which Council approved in April.

The new formula reduces assessment income by approximately \$500,000 from the amount that would have been received under the previous formula when comparing the two formulas using 2017 assessment figures based on 2014 parochial report expense figures. The 2018 assessment figures are based on 2015 parochial reports, in which congregational expenses across our diocese were approximately \$200,000 higher than in the prior year, resulting in a budgeted reduction in assessment income of approximately \$320,000 when comparing 2017 to 2018 figures.

The Diocesan Council directed that 25% of assessment income be earmarked for strategic ministries, an amount that is roughly equivalent to the funds budgeted for those ministries in 2017. Two other sources of funding for strategic ministries were extinguished in 2017, one from the proceeds of the sale of a closed church and one from Together Now campaign funds.

In addition to the diocesanwide reduction in assessments, the bishops' funding priorities and input from staff and ministry area leaders also informed the preparation of this budget, as did the participation of the Diocesan Council Strategic Ministry Evaluation Task Force and the Mission Strategy Implementation Organizing Team in the strategic ministry hearings. The Budget Committee is appreciative of the Strategic Ministry Evaluation Task Force's work in developing a more expansive application and review process.

Changes in nomenclature and presentation

The distinction between 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.

This way of presenting the budget resulted in a rather complex chart for communicating the sources of funding for various programs. Effective with the 2018 budget, what has been referred to as the Core Budget is now called the Operational Budget. What has been referred to as the

Supplemental Budget is now called the Strategic Budget. Each of these parts of the budget contains specific areas:

Operational Budget Areas

Support of the Wider Church
 Support for Congregations
 Episcopate and Convention
 Facilities and Administration

Strategic Budget Areas

Congregational Grants and Direct Support
 Support for Clergy
 Strategic Ministries

Along with the change in nomenclature, a clearer and simpler method of presenting sources of funding has been incorporated into this year's budget.

The assessment formula: Our common share

At its April 2017 meeting, Diocesan Council approved the following tiered 2018 assessment formula which results in a 10% aggregate decrease in the assessment revenue (approximately \$500,000 less than under the previous formula):

Where BASE for 2018, according to the tiered system below, is equal to line 14 ("all other operating expenses") from the 2015 parochial report, less line 7 ("assistance from diocese"), the following rates shall be applied (for a mission, the 2018 assessment is two-thirds the amount that would be assessed if it were a parish):

Step 1: \$00 to	\$50,000	0.15%
Step 2: \$50,001 to	\$500,000	14.50%
Step 3: \$500,001 to	\$99,000,000	15.50%

The Assessment Formula Review Committee was guided by two principles in crafting the new formula. The first is the belief that every congregation should contribute something, which is why even the smallest congregations will be paying an assessment (though at the very minimal rate of 0.15%, or \$75, on the first \$50,000 of expenses for parishes, and two-thirds that amount for missions). The second guiding principle is seen in the decision to adopt a tiered formula rather than a single rate: *"From everyone to whom much has been given, much will be required..." (Luke 12:48)*

This assessment formula together with the parochial report data for 2015 generates a gross assessment for 2018 of \$4,785,255. Again this year Diocesan Council created an Assessment Coordinating Committee, whose adjustments to the assessments of seven congregations totaled \$39,896. See the charts on pages 16-21 for details of assessments, including adjustments.

The total value of assessments in 2018 is \$4,745,359, and our reserve for uncollected assessments is \$20,000. In addition to the assessments, revenue also reflects \$45,000 in projected voluntary contributions from two congregations not subject to the assessment.

The impact of assessment reduction

In order to balance the budget, expenses will be reduced to match the reduction in income. The needed savings will be achieved by a reorganization of diocesan staff and programming. It seems wise to effect these changes in a single overhaul, not stretch it out over multiple years with ever-changing staff configurations and job descriptions or the reassignment of program responsibilities from year to year.

Some of the reduction in diocesan staff will be achieved by virtue of normal attrition—staff members retiring or leaving to seek other job opportunities elsewhere. Most of the reduction will be a matter of reorganizing diocesan structure to more clearly reflect the new mission strategy. Such reorganization, under the direction of the bishop diocesan, requires consultation and careful planning. It will mean staff reductions, retraining or hiring where new skill sets are needed; reconfiguration of job descriptions and organizational structures; and changes in programming.

These changes will unfold in the coming months. In order to facilitate these changes in staffing, the Diocesan Council approved a one-time extraordinary draw from investments of up to \$150,000 to cover severance and outplacement services.

A new vision for diocesan staff and program

The mission strategy adopted last year invites us to “embrace brave change” by reimagining our congregations, building our relationships and engaging our world. Several elements of the mission strategy have inspired Bishop Gates, in consultation with Bishop Harris and other diocesan leaders, to envision a new structure for diocesan staff and program which will respond to the opportunities of our mission strategy as well as the challenges of a smaller diocesan budget. Here are three key elements of the staff reorganization:

Regional Canons

Our mission strategy calls us to create “opportunities for diocesan staff members to be present in congregations and ministries around our diocese and to gather with lay leaders and clergy in order to share and learn best practices, develop closer partnerships and know all of our communities.” Three regional canons will be named to provide support in a geographic area of our diocese, each one covering four deaneries. The regional canons will assume responsibility for transition ministry, congregational leadership development and pastoral care of clergy, and they will be able to walk more closely with the congregations in their respective regions.

Canon for Immigration Ministries

Our mission strategy expresses our desire to invest “in ministries with communities of color and immigrant communities, drawing upon their unique strengths and supporting their health.” A canon will be named to support the development of ministries in those congregations, working in collaboration with the regional canons, and to facilitate our response to wider immigration concerns.

Director of Networking and Training

Our mission strategy envisions “connecting and equipping networks of lay people, clergy and diocesan staff members who share a passion for particular forms of service and public advocacy.” A director of networking and training will be named to support these networks as they emerge and to support them as they take leadership in providing resources to our congregations.

Income from investments and fees

Operating budget revenue amounting to 27.2% 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, are not subject to restriction regarding the use of the income provided through the spending policy draws and are referred to as unrestricted. The unrestricted funds represent about 25% of the available spending policy income. The remaining funds have some restriction on the use of the spending policy income, but in most cases the restriction is consistent with the regularly anticipated expenses of the diocese. There are a few funds, however, where the restrictions call for close monitoring and measurement.

Spending Policy – Agency Endowments

The appendix on page 56 lists the endowments owned by the diocese and managed primarily by the Trustees of Donations (TOD). These include some funds that are unrestricted and others that have a restriction on their use as stipulated by a third party donor at the time the fund was created or stipulated by Diocesan Council. Pages 51-55 offer more historical detail about these funds.

The proposed spending policy for 2018 is the same formula used by the TOD: to draw 4% of a base that reflects the average of the market value over the past 12 trailing quarter average, calculated as of June 30, 2017.

The total spending policy income available to the 2018 Operational Budget is \$1,061,804, which is \$27,995 more than in 2017. The increase reflects net additions to the endowment over the past 12 quarters as well as market appreciation.

Spending Policy – Trust Endowments

The appendix table on page 58 lists the trusts owned and managed by the TOD for the benefit of the diocese. In 2018 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 2014 through June 2017.

There are a few funds with restrictions that require the TOD to deviate from the general spending policy formula. In some cases, the distribution is limited to dividend income produced by the fund, or, in other cases, all income must be reinvested for the time being. The table of projected trust income for these funds is an estimate of the income that will be available in 2018.

The total spending policy income available in 2018 (\$858,947) is a small decrease from 2017 (\$867,489), due to market changes.

Spending Policy and Operating Revenue

For several years, our financial advisory bodies have recommended, and the Diocesan Council has affirmed its support for, a 4% spending draw from diocesan endowment funds to support the Operational Budget. The value of each fund for the purpose of calculating the draw is based on a trailing 12-quarter average of end-of-month market value, adjusted for additions and withdrawals. This policy will continue in 2018.

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

It is possible that some future strategic draw on the endowment could be needed if actual diocesan operations run at a significant deficit. Ideally, setting sufficient levels of reserves for adverse outcomes and maintaining strong financial controls throughout the year will prevent or minimize this type of supplemental draw. To that end, Council formally established and seeded three reserves (see page 52): one for future episcopal elections (cost center 4023), one for major equipment purchases (cost center 5142) and one for capital improvements (cost center 5141). These are in addition to the longtime reserve for General Convention expenses (cost center 4411). The 2018 operating budget provides continued funding for each of these four reserves.

Other Dividend and Interest Income

The estimate for 2018 dividend income is \$74,000. Of this, \$42,400 is from a gift of stock received more than 40 years ago, with the request that it not be sold. The other sources of income recorded here are three charitable remainder trusts not held by the Trustees of Donations and dividend income on diocesan money market and bond mutual funds. The interest income, estimated at \$8,000, is primarily from clergy loans.

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

Fee Income

An estimated \$231,708 in fee income is derived primarily from contributions from participants in diocesan events and programs.

Strategic Budget Income

The Strategic Budget table on pages 12-13 shows seven sources of revenue, in addition to assessment revenue and investment draws:

1. *Grants from Bishop's Directed Funds (BDF's, formerly known as Bishop's Discretionary Funds), restricted and unrestricted:* These are trust funds held by the Trustees of Donations where the bishop diocesan and the diocese are named as income beneficiaries; some are restricted in use and some are not. Of the many funds owned by the Trustees of Donations, 34 funds (listed on page 59) with a market value of approximately \$19.4 million (as of June 30, 2017) are for the benefit of our diocese as determined by the bishop diocesan, and the Trustees of Donations provide him with an annual spending policy from these trusts. The generosity of past donors and the bishop diocesan makes it possible to fund new ventures in mission and strategic ministries through the Strategic Budget.

In 2018, Bishop Gates will continue the practice of using the bulk of the BDF income to support pilot programs and new initiatives and to supplement the financing of strategic ministries. The 2018 draw from these funds is set at \$685,000.

2. *The Annual Fund:* The 2018 Annual Fund goal is set at \$275,000 to cover various strategic ministries. With \$30,000 needed to cover the direct costs of the Annual Fund, \$245,000 is likely to be available for Annual Fund grants in 2018. If the Annual Fund receives more than \$275,000, then the grants from the BDF's will be reduced.

3. *Contributions:* Fundraising by the Chinese Ministry, Life Together and Jubilee Global Ministries. In 2018, these contributions are budgeted at \$139,436.

4. *Grants:* These total \$107,000 in 2018. The largest grant recorded here is \$70,000, a continuation of the grant from Episcopal City Mission to the Life Together program. Projected grants from external foundations total \$37,000.

5. *Proceeds from closed parishes:* The Closed Parish Net Proceeds Fund shows no revenue because the monies generated by the closing and sale of the Church of the Holy Spirit and its rectory in Wayland are frozen while decisions are made about the removal and relocation of cremated remains from the churchyard. Once this process is completed, a final accounting will

be made available and use of the funds will be determined by the Diocesan Council according to its policy for such funds. See pages 44-46 for more information.

6. *In-kind*: This line reflects Life Together's use of the diocesan property at 40 Prescott Street, Brookline for offices and fellow housing, as well as the rectory of the former St. Luke's and St. Margaret's Church in Allston, valued at \$65,000 (see pages 32-33).

7. *Fee Revenue*: Received for Life Together site placements, consulting and rental fees, and for diocesan youth ministry programs.

The structure for reporting diocesan staffing, programs and operations

In recent years these have been reported in terms of five functional areas: Deaneries, Congregations and Clergy; Congregational Resources and Training; Strategic Ministries; Episcopal and Diocesan Support; and Administrative Services. As previously noted, the 2018 budget is presented so that strategic ministries are presented as the Strategic Budget with clearly reported sources of funding and expenses. The remaining areas are reported as part of the Operational Budget, and are now in three functional categories: Support for Congregations; Episcopate and Convention; and Facilities and Administration.

Major changes in diocesan staffing, programs and operations in response to the mission strategy adopted at the annual Diocesan Convention in 2016 and the new assessment formula place limits on the level of detail that can be provided at this time. For the purpose of presenting the proposed budget to Diocesan Council and Convention in a timely manner, compensation and benefits are reported as a maximum aggregate number across the three functional areas in the Operational Budget. Expenses for each of these functional areas are an estimate based on budgeted expenses in 2017, but these figures will be refined as the new staffing structure and program priorities emerge.

The treasurer of our diocese will ensure that financial records and reporting are reflective of the resources applied to each component of these functional areas and will communicate these with a similar level of clarity and transparency.

Episcopal Diocese of Massachusetts												
Strategic Budget by Funding Source (with Operational Budget funded by BDF and Annual Fund)												
2018 Budget, 2017 Budget and 2016 Actual												
	2018 Budget				2017 Budget				2016 Actual			
	Assessments	Agency Draw	Trust Draw	BDF Grants	Annual Fund Revenue	Contributions	Grants	In Kind	Fee Revenue	TOTAL	TOTAL	TOTAL
Congregational Grants												
2011 Cong Dev Open Grants	43,588	-	-	66,412	-	-	-	-	-	110,000	-	150,000
2012 Cong Dev Targeted Grants	60,000	-	-	-	-	-	-	-	-	60,000	-	60,000
2013 Bristol County Case Fund Grants	-	136,477	-	-	-	-	-	-	-	136,477	-	135,162
2014 Congregational Program Grants	-	36,694	-	-	-	-	-	-	-	36,694	-	36,574
2015 Deaf Ministry Grants	-	8,000	-	-	-	-	-	-	-	8,000	-	8,000
2021 Sending Serving Grants	48,000	-	-	-	-	-	-	-	-	48,000	-	48,000
2022 House of Mercy Grants	-	32,017	-	-	-	-	-	-	-	32,017	-	31,703
2031 Hispanic Ministries	25,000	-	-	-	-	-	-	-	-	25,000	-	25,000
3431 African Ministries	20,000	-	-	-	-	-	-	-	-	20,000	-	20,000
Total Congregational Grants	196,588	213,188	-	66,412	-	-	-	-	-	476,188	-	519,439
Support for Clergy												
1101 Making Excellent Disciples	-	-	-	20,000	-	-	-	-	-	20,000	-	20,000
1211 Sabbaticals	-	9,145	-	17,500	-	-	-	-	-	26,645	-	26,555
1221 Scholarships for Clergy Dependents	-	-	-	33,337	-	-	-	-	-	33,337	-	33,337
1231 Support for Retired Clergy	11,500	-	-	5,500	-	-	-	-	-	17,000	-	17,000
Total Support for Clergy	11,500	9,145	-	76,337	-	-	-	-	-	96,982	-	116,892
Strategic Ministries												
2014 Congregational Program Grants	-	-	-	40,000	-	-	-	-	-	40,000	-	35,000
2014 Congregational Program Grants - IMZ	-	-	-	40,000	-	-	-	-	-	40,000	-	-
1001 Deaneries	4,800	-	-	-	-	-	-	-	-	4,800	-	4,800
1002 Deans	18,000	-	-	-	-	-	-	-	-	18,000	-	18,000
1003 Deanery Confirmations	-	-	-	-	-	-	-	-	-	-	-	12,000
1421 Clergy Conference	55,000	-	-	-	-	-	-	-	60,000	115,000	-	103,000
1431 Clergy Day	1,000	-	-	-	-	-	-	-	2,000	3,000	-	3,000
2112 Spring Learning Event	3,500	-	-	-	-	-	-	-	1,500	5,000	-	5,000
2113 Resource Day	7,500	-	-	-	-	-	-	-	4,000	11,500	-	10,500
3000 Strategic Ministries	260,000	-	-	-	-	-	-	-	-	260,000	-	-
3011 Youth Ministry	93,260	52,552	-	-	-	-	-	-	30,000	175,812	-	242,662
3012 Youth Leadership Academy	13,000	-	-	-	-	-	-	-	40,000	53,000	-	53,000
3056 Life Together	64,628	10,372	-	25,000	100,000	93,000	90,000	65,000	252,000	700,000	-	709,000
3111 MIT Ministry	115,582	13,163	-	3,482	-	-	-	-	-	132,227	-	127,864
3121 Boston University	66,837	13,163	-	-	-	-	-	-	-	80,000	-	56,278
3136 BC/NU Combined	115,133	13,164	-	500	-	-	-	-	-	128,797	-	129,058
3171 Tufts University Ministry	-	14,000	-	-	-	-	-	-	-	14,000	-	14,000
3221 Brockton, Grace Chapel	-	-	-	145,553	-	-	-	-	-	145,553	-	114,006
3231 Chelsea, St. Luke's/San Lucas	-	6,717	59,283	-	-	-	-	-	-	66,000	-	66,000
3241 Hyde Park, Christ Church	-	6,717	37,283	-	-	-	-	-	-	44,000	-	44,000
3251 South End, St. Stephen's	89,010	27,475	27,418	-	-	-	-	-	-	143,903	-	138,898
3311 Boston, Chinese Ministries	6,570	25,830	-	-	-	27,500	17,000	-	-	76,900	-	153,328
3331 Dorchester, St. Mary's	-	-	3,996	36,004	-	-	-	-	-	40,000	-	50,000
3341 Salem, San Pedro	-	19,274	2,226	-	-	-	-	-	-	21,500	-	65,000
3351 Lawrence, Grace Church	-	27,475	32,525	-	-	-	-	-	-	60,000	-	60,000
3361 Watertown, Good Shepherd	-	-	-	-	15,000	-	-	-	-	15,000	-	30,000
3371 S. Dartmouth, St. Peter's The Bridge	-	-	-	45,000	-	-	-	-	-	45,000	-	45,000
3411 Urban Resident	1,145	34,802	39,053	-	-	-	-	-	-	75,000	-	86,719
3511 Sustainable Development Grants	31,421	-	1,655	-	-	18,936	-	-	-	52,012	-	124,359
3531 Middle East Network Committee	-	-	-	-	-	-	-	-	-	-	-	1,000
3541 B-SAFE	-	-	-	95,000	130,000	-	-	-	-	225,000	-	250,000
3545 B-PEACE	-	-	-	40,000	-	-	-	-	-	40,000	-	50,000

BUDGET RESOLUTION

MOVED, that the 232nd Annual Convention of the Episcopal Diocese of Massachusetts approve the budget of revenue and expenses for 2018 as summarized on page 15, including the individual parish and mission assessments and approved adjustments for 2018 listed on pages 16-21.

Episcopal Diocese of Massachusetts
Summary of Combined Operational & Strategic Budgets
2018 Budget, 2017 Budget and 2016 Actual

	2018 Budget			2017 Budget			2016 Actual		
	Combined	Operational	Strategic	Combined	Operational	Strategic	Combined	Operational	Strategic
Revenue									
Assessments before adjustments	4,785,255	3,578,307	1,206,948	5,139,654	3,737,172	1,402,482			4,972,330
Less adjustments	(39,896)	(29,922)	(9,974)	(75,000)	(56,250)	(18,750)			(81,830)
Assessments after adjustments	4,745,359	3,548,385	1,196,974	5,064,654	3,680,922	1,383,732			4,890,500
Less reserve for Uncollected Assessments	(20,000)	(15,000)	(5,000)	(20,000)	(15,000)	(5,000)			32,812
Agency Fund draws (4% draw rate)	1,061,804	571,027	490,777	1,033,809	466,218	567,591			1,021,972
Trust Fund draws (4% draw rate)	858,947	655,508	203,439	867,489	666,585	200,904			818,466
Congregational contributions	45,000	45,000	-	58,000	58,000	-			45,750
Interest income	8,000	8,000	-	8,000	8,000	-			13,913
Dividend income	74,000	74,000	-	78,000	78,000	-			73,747
Fee income - operations	231,708	231,708	-	385,698	385,698	-			449,706
Total Revenue from Operations	7,004,818	5,118,628	1,886,190	7,475,650	5,328,423	2,147,227			7,346,866
BDF Grants	685,000	22,712	662,288	694,445	289,069	405,376			648,278
Annual Fund	275,000	30,000	245,000	328,781	30,000	298,781			243,741
Contributions	139,436	-	139,436	146,784	-	146,784			174,190
Grants	107,000	-	107,000	106,333	-	106,333			70,000
Proceeds from Closed Parishes	-	-	-	114,006	-	114,006			102,777
In-Kind Revenue	65,000	-	65,000	65,000	-	65,000			70,000
Fee income - strategic	389,500	-	389,500	307,000	-	307,000			260,382
Endow. Withdrawal for Severance Expenses (SS)	150,000	150,000	-	-	-	-			-
Total Revenue - Other Sources	1,810,936	202,712	1,608,224	1,762,349	319,069	1,443,280			1,569,368
Total Revenue - Operations & Strategic	8,815,754	5,321,340	3,494,414	9,237,999	5,647,492	3,590,507			8,916,234
Expenses									
Support of Wider Church									
The Episcopal Church Contribution	860,101	860,101	-	860,101	860,101	-			938,292
Council of Churches	50,000	50,000	-	50,000	50,000	-			50,000
Province I Contribution	16,179	16,179	-	16,179	16,179	-			16,179
Subtotal - Support of Wider Church	926,280	926,280	-	926,280	926,280	-			1,004,471
Congregational Grants and Direct Support	476,188	-	476,188	519,439	-	519,439			473,919
Support for Clergy	96,982	-	96,982	116,892	-	116,892			94,300
Extraordinary Severance Expenses (EST)	150,000	150,000	-	-	-	-			-
Support for Congregations	1,110,556	1,110,556	-	1,423,870	1,423,870	-			1,964,899
Strategic Ministries	2,921,244	-	2,921,244	2,954,176	-	2,954,176			2,459,583
Episcopate and Convention	1,584,817	1,584,817	-	1,596,487	1,596,487	-			1,447,494
Facilities and Administration	1,549,687	1,549,687	-	1,700,855	1,700,855	-			1,488,343
Total Expenses	8,815,754	5,321,340	3,494,414	9,237,999	5,647,492	3,590,507			8,933,009
Net surplus (deficit)	-	-	-	-	-	-			(16,775)

2018 ASSESSMENTS BY DEANERY

CODE diocesan church code
M "M" if a mission (2/3rds assessment)
BASE line 14 less line 7 from the 2015 Parochial Report

FORMULA ASSESSMENT

For 2018:
Step One: \$ 0 to \$50,000 0.15%
Step Two: \$ 50,001 to \$500,000 14.50%
Step Three \$500,001 to \$99,000,000 15.50%

For 2017: 15.5% * BASE, LESS \$6,000

ADJUSTMENT initially 0; determined by committee and council

ASSESSMENT formula less adjustment

EFFECTIVE RATE the proposed assessment divided by the BASE, expressed as a percent

PRIOR YEAR ASSESSMENT after any adjustment

DIFFERENCE between 2018 proposed and 2017 prior year assessments

PRIOR YEAR ADJUSTMENT amount of any adjustment received prior year

ALEWIFE

CODE M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
2010	Arlington, Church of Our Saviour	135,015	12,402	0	12,402	9.2	15,099	-2,697	2,172
2015	Arlington, St. John's Church	122,674	10,613	0	10,613	8.7	22,917	-12,304	3,241
2025	Bedford, St. Paul's Church	199,538	21,758	0	21,758	10.9	23,242	-1,484	0
2030	Belmont, All Saints' Church	238,770	27,447	0	27,447	11.5	28,221	-774	0
2045	Burlington, St. Mark's Church	91,664	6,116	0	6,116	6.7	7,902	-1,786	0
2050	Cambridge, Christ Church	853,479	120,114	0	120,114	14.1	111,179	8,935	0
2055	Cambridge, St. Bartholomew's Church	165,096	16,764	0	16,764	10.2	22,311	-5,547	0
2060	Cambridge, St. James's Church	325,028	39,954	0	39,954	12.3	54,443	-14,489	0
2065	Cambridge, St. Peter's Church	261,099	30,684	0	30,684	11.8	33,214	-2,530	0
2085	Lexington, Church of Our Redeemer	356,804	44,562	0	44,562	12.5	55,406	-10,844	4,392
2135	Somerville, St. James's Church	87,467	5,508	0	5,508	6.3	6,576	-1,068	0
2145	Waltham, Christ Church	130,779	11,788	0	11,788	9.0	19,396	-7,608	0
2150	Watertown, Church of the Good Shepherd	125,156	10,973	0	10,973	8.8	12,410	-1,437	0
	TOTALS:	3,092,569	358,682	0	358,682	11.6	412,316	-53,634	9,805

BOSTON HARBOR

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4035	Boston, Church of St. Augustine & St. Martin	113,905	9,341	0	9,341	8.2	12,776	-3,435	0
4010	Boston, Church of the Advent	1,142,875	164,971	0	164,971	14.4	122,701	42,270	0
4025	Boston, Emmanuel Church	336,429	41,607	0	41,607	12.4	36,637	4,970	0
4070 M	Boston, St. Stephen's Church	59,753	993	0	993	1.7	1,615	-622	0
4075	Boston, Trinity Church	2,711,826	408,158	0	408,158	15.1	409,233	-1,075	0
1030	Charlestown, St. John's Church	200,386	21,881	0	21,881	10.9	22,361	-480	0
4055	Dorchester, St. Mark's Church	122,499	10,587	0	10,587	8.6	14,781	-4,193	0
4060	Dorchester, St. Mary's Church	109,290	8,672	0	8,672	7.9	8,792	-120	0
3020	Jamaica Plain, St. John's Church	188,720	20,189	0	20,189	10.7	20,171	18	0
4040	Roxbury, St. Cyprian's Church	199,466	21,748	0	21,748	10.9	32,111	-10,363	0
4050	Roxbury, St. John St. James Church	87,915	5,573	5,073	500	0.6	11,939	-11,439	0
	TOTALS:	5,273,064	713,720	5,073	708,647	13.4	693,116	15,531	0

CAPE AND ISLANDS

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
6005	Barnstable, St. Mary's Church	598,592	80,607	0	80,607	13.5	77,810	2,797	0
6010	Buzzards Bay, St. Peter's Church	126,473	11,164	0	11,164	8.8	12,887	-1,723	0
6015	Chatham, St. Christopher's Church	612,507	82,764	0	82,764	13.5	82,740	23	0
6020	Edgartown, St. Andrew's Church	267,522	31,616	0	31,616	11.8	35,542	-3,926	0
6030	Falmouth, St. Barnabas's Church	548,607	72,859	0	72,859	13.3	71,652	1,207	0
6040	Harwich Port, Christ Church	281,256	33,607	0	33,607	11.9	37,240	-3,633	0
6045	Nantucket, St. Paul's Church	502,424	65,701	0	65,701	13.1	67,143	-1,442	0
6050	Oak Bluffs, Trinity Church	20,356	31	0	31	0.2	0	31	0
6055	Orleans, Church of the Holy Spirit	505,021	66,103	0	66,103	13.1	77,023	-10,919	0
6060	Osterville, St. Peter's Church	339,683	42,079	0	42,079	12.4	46,420	-4,341	6,700
6065	Plymouth, Christ Church	284,515	34,080	0	34,080	12.0	44,404	-10,325	0
6070	Provincetown, Church of St. Mary of the Harbor	178,593	18,721	0	18,721	10.5	21,334	-2,613	0
6075	Sandwich, St. John's Church	166,625	16,986	0	16,986	10.2	20,217	-3,231	0
6095	South Yarmouth, St. David's Church	281,094	33,584	0	33,584	11.9	26,463	7,121	0
6080	Vineyard Haven, Grace Church	243,267	28,099	0	28,099	11.6	33,446	-5,347	0
6085	Wareham, Church of the Good Shepherd	199,242	21,715	0	21,715	10.9	24,955	-3,240	8,000
6090	Wellfleet, St. James the Fisherman Church	32,109	48	0	48	0.2	0	48	0
6025	Woods Hole, Church of the Messiah	273,405	32,469	0	32,469	11.9	32,860	-391	0
	TOTALS:	5,461,291	672,230	0	672,230	12.3	712,136	-39,906	14,700

CHARLES RIVER

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
3030	Brookline, All Saints Parish	363,381	45,515	0	45,515	12.5	51,090	-5,575	0
3035	Brookline, Church of Our Saviour	250,123	29,093	0	29,093	11.6	37,692	-8,599	0
3045	Brookline, St. Paul's Church	418,147	53,456	0	53,456	12.8	45,520	7,936	0
3125	Chestnut Hill, Church of the Redeemer	883,285	124,734	0	124,734	14.1	131,405	-6,671	0
3060	Dover, St. Dunstan's Church	276,905	32,976	0	32,976	11.9	37,148	-4,172	0
3105	Needham, Christ Church	513,214	67,373	0	67,373	13.1	70,342	-2,969	0
3145	Newton Centre, Trinity Church	326,942	40,232	0	40,232	12.3	37,590	2,641	0
3135	Newton Highlands, Parish of St. Paul	183,239	19,395	0	19,395	10.6	25,160	-5,766	0
3140	Newton Lower Falls, St. Mary's Church	358,647	44,829	0	44,829	12.5	50,823	-5,995	0
3110	Newton, Grace Church	340,753	42,234	0	42,234	12.4	45,418	-3,184	0
3130	Newtonville, St. John's Church	145,640	13,943	0	13,943	9.6	15,961	-2,018	0
3115	Waban, Church of the Good Shepherd	337,851	41,813	0	41,813	12.4	48,719	-6,906	0
3165	Wellesley, St. Andrew's Church	944,370	134,202	0	134,202	14.2	132,639	1,563	0
	TOTALS:	5,342,497	689,796	0	689,796	12.9	729,510	-39,714	0

CONCORD RIVER

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
2005	Acton, Church of the Good Shepherd	312,126	38,083	0	38,083	12.2	40,773	-2,690	0
2020	Ayer, St. Andrew's Church	156,715	15,549	0	15,549	9.9	17,246	-1,697	0
2075	Concord, Trinity Church	674,306	92,342	0	92,342	13.7	94,493	-2,151	0
3065	Framingham, St. Andrew's Church	278,672	33,232	0	33,232	11.9	34,683	-1,450	0
3075	Holliston, St. Michael's Church	171,485	17,690	0	17,690	10.3	17,455	235	0
3080	Hopkinton, St. Paul's Church	71,838	3,242	0	3,242	4.5	8,324	-5,082	1,521
2080	Hudson, St. Luke's Church	79,474	4,349	0	4,349	5.5	2,937	1,412	0
2090	Lincoln, St. Anne's-in-the-Fields Church	540,594	71,617	0	71,617	13.2	80,649	-9,032	0
3100	Natick, St. Paul's Church	443,679	57,158	0	57,158	12.9	63,433	-6,275	0
2125	Shirley, Trinity Chapel	73,021	3,413	0	3,413	0.0	5,306	-1,893	0
3155	Southborough, St. Mark's Church	252,234	29,399	0	29,399	11.7	33,033	-3,634	0
2140	Sudbury, St. Elizabeth's Church	372,068	46,775	0	46,775	12.6	65,515	-18,740	0
2165	Weston, St. Peter's Church	391,976	49,662	0	49,662	12.7	63,557	-13,896	0
	TOTALS:	3,818,188	462,511	0	462,511	12.1	527,404	-64,893	1,521

MERRIMACK VALLEY

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1005	Amesbury, St. James's Church	147,066	14,150	0	14,150	9.6	8,550	5,600	0
1010	Andover, Christ Church	508,036	66,571	0	66,571	13.1	80,221	-13,650	0
2070	Cheimsford, All Saints' Church	306,903	37,326	0	37,326	12.2	38,078	-752	0
1055	Groveland, St. James's Church	134,407	12,314	0	12,314	9.2	13,460	-1,146	0
1065	Haverhill, Trinity Church	189,288	20,272	0	20,272	10.7	21,808	-1,536	0
1075	Lawrence, Grace Church	208,291	23,027	0	23,027	11.1	17,404	5,624	0
2095	Lowell, St. Anne's Church	249,924	29,064	0	29,064	11.6	23,174	5,890	5,000
2100	Lowell, St. John's Church	66,243	2,430	0	2,430	3.7	1,509	922	0
1125	Methuen, St. Andrew's Church	72,337	3,314	0	3,314	4.6	5,356	-2,042	0
1130	Newburyport, St. Paul's Church	284,907	34,137	0	34,137	12.0	41,317	-7,181	6,324
1135	North Andover, St. Paul's Church	223,348	25,210	12,510	12,700	5.7	21,254	-8,554	0
2040	North Billerica, St. Anne's Church	174,906	18,186	10,790	7,396	4.2	22,938	-15,541	0
1195 M	West Newbury, All Saints' Church	95,644	4,462	0	4,462	4.7	8,407	-3,945	0
2160	Westford, St. Mark's Church	128,526	11,461	0	11,461	8.9	14,669	-3,208	0
	TOTALS:	2,789,826	301,924	23,300	278,624	10.0	318,144	-39,520	11,324

MT HOPE BUZZARDS BAY

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
5030	Fairhaven, Church of the Good Shepherd	0	0	0	0	0	0	0	0
5035	Fall River, Church of the Holy Spirit	195,638	21,193	0	21,193	10.8	26,698	-5,505	0
5045	Fall River, St. Luke's Church	24,111	36	0	36	0.2	0	36	0
5070	Marion, St. Gabriel's Church	379,741	47,887	0	47,887	12.6	59,896	-12,008	0
5080	New Bedford, Grace Church	560,061	74,634	0	74,634	13.3	71,385	3,250	0
5085	New Bedford, St. Andrew's Church	74,777	3,668	0	3,668	4.9	5,072	-1,405	0
5090	New Bedford, St. Martin's Church	89,425	5,792	0	5,792	6.5	7,007	-1,216	0
5110	Somerset, Church of Our Saviour	132,072	11,975	0	11,975	9.1	14,762	-2,786	4,482
5020	South Dartmouth, St. Peter's Church	52,369	419	0	419	0.8	2,227	-1,809	0
5115	Swansea, Christ Church	141,452	13,336	0	13,336	9.4	17,676	-4,340	0
	TOTALS:	1,649,646	178,939	0	178,939	10.8	204,722	-25,783	4,482

MYSTIC VALLEY

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1035	M Chelsea, St. Luke's/San Lucas Church	110,605	5,908	0	5,908	5.3	5,527	382	0
1025	M East Boston, Grace Church Federated	27,590	28	0	28	0.0	0	28	0
1045	Everett, Grace Church	83,218	4,892	0	4,892	5.9	10,934	-6,042	0
1095	Lynnfield, St. Paul's Church	193,359	20,862	0	20,862	10.8	24,058	-3,196	4,720
1105	Malden, St. Paul's Church	131,952	11,958	0	11,958	9.1	13,176	-1,218	4,000
2115	Medford, Grace Church	351,137	43,740	0	43,740	12.5	42,372	1,368	0
1120	Melrose, Trinity Parish	203,389	22,316	0	22,316	11.0	26,514	-4,198	0
1145	Reading, Church of the Good Shepherd	158,189	15,762	0	15,762	10.0	20,057	-4,294	0
1170	Saugus, St. John's Church	147,347	14,190	4,976	9,214	6.3	15,214	-6,000	6,000
1175	Stoneham, All Saints' Church	0	0	0	0	0.0	4,170	-4,170	0
1190	Wakefield, Emmanuel Church	178,152	18,657	0	18,657	10.5	20,814	-2,157	0
2170	Wilmington, St. Elizabeth's Church	33,712	51	0	51	0.2	709	-658	0
2175	Winchester, Parish of the Epiphany	699,855	96,303	0	96,303	13.8	102,159	-5,856	0
1200	Winthrop, St. John's Church	130,474	11,744	0	11,744	9.0	15,142	-3,398	0
2180	Woburn, Trinity Church	88,009	5,586	0	5,586	6.3	6,516	-930	0
	TOTALS:	2,536,988	271,997	4,976	267,021	10.5	307,361	-40,341	14,720

NEPONSET RIVER

	M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4085		Canton, Trinity Church	148,819	14,404	0	14,404	9.7	16,906	-2,502	0
3050		Dedham, Church of the Good Shepherd	84,919	5,138	0	5,138	6.1	7,686	-2,548	0
3055		Dedham, St. Paul's Church	346,071	43,005	0	43,005	12.4	43,889	-884	0
4015		Dorchester, Parish of All Saints	370,481	46,545	0	46,545	12.6	51,169	-4,625	0
3005		Hyde Park, Christ Church	13,012	20	0	20	0.2	4,464	-4,445	0
3015	M	Hyde Park, Iglesia de San Juan	0	0	0	0	0.0	0	0	0
4030		Mattapan, Church of the Holy Spirit	277,382	33,045	0	33,045	11.9	29,551	3,494	0
3085		Medfield, Church of the Advent	204,864	22,530	0	22,530	11.0	26,616	-4,086	0
3090		Medway, Christ Church	70,127	2,993	0	2,993	4.3	1,603	1,390	0
4130		Milton, St. Michael's Church	470,014	60,977	0	60,977	13.0	67,152	-6,175	0
3150		Norwood, Grace Church	128,431	11,447	0	11,447	8.9	12,536	-1,088	0
5105		Sharon, St. John's Church	47,775	72	0	72	0.2	1,600	-1,529	0
4160		Stoughton, Trinity Church	69,938	2,966	0	2,966	4.2	3,620	-654	0
3160		Walpole, Epiphany Church	194,894	21,085	0	21,085	10.8	26,453	-5,368	7,000
3010		West Roxbury, Emmanuel Church	72,795	3,380	0	3,380	4.6	7,857	-4,477	0
3170		Westwood, St. John's Church	158,830	15,855	0	15,855	10.0	8,280	7,576	0
		TOTALS:	2,658,352	283,463	0	283,463	10.7	309,383	-25,919	7,000

NORTH SHORE

	M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1015		Beverly Farms, St. John's Church	574,812	76,921	0	76,921	13.4	71,430	5,491	0
1021		Beverly, St. Peter's Church	243,847	28,183	0	28,183	11.6	30,944	-2,761	0
1143		Danvers, All Saints	173,821	18,029	0	18,029	10.4	20,050	-2,021	0
1050		Gloucester, St. John's Church	239,207	27,510	0	27,510	11.5	28,514	-1,004	0
1070		Ipswich, Ascension Memorial Church	254,097	29,669	0	29,669	11.7	29,550	120	0
1090		Lynn, St. Stephen's Memorial Episcopal Church	307,843	37,462	0	37,462	12.2	40,114	-2,652	0
1116		Marblehead, St. Michael's Church	324,881	39,933	0	39,933	12.3	42,319	-2,386	0
1110		Marblehead, Wyman Memorial Church of St. Andrew	313,860	38,335	0	38,335	12.2	39,918	-1,583	0
1155		Rockport, St. Mary's Church	152,856	14,989	0	14,989	9.8	18,306	-3,317	0
1160		Salem, Grace Church	139,730	13,086	0	13,086	9.4	16,783	-3,697	0
1165		Salem, St. Peter's Church	122,460	10,582	0	10,582	8.6	14,383	-3,801	0
1060		South Hamilton, Christ Church	427,878	54,867	0	54,867	12.8	58,612	-3,744	0
1180		Swampscott, Church of the Holy Name	135,814	12,518	0	12,518	9.2	15,433	-2,915	0
1185		Topsfield, Trinity Church	235,678	26,998	0	26,998	11.5	31,877	-4,879	0
		TOTALS:	3,646,784	429,082	0	429,082	11.8	458,230	-29,149	0

SOUTH SHORE

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4080	Braintree, Emmanuel Church	101,913	7,602	1,600	6,002	5.9	0	6,002	0
4090	Cohasset, St. Stephen's Church	385,280	48,691	0	48,691	12.6	45,478	3,212	0
4095	Duxbury, Church of St. John the Evangelist	390,187	49,402	0	49,402	12.7	40,789	8,613	0
4100	Hanover, St. Andrew's Church	113,896	9,340	1,944	7,396	6.5	17,070	-9,674	5,000
4105	Hingham, Parish of St. John the Evangelist	518,522	68,196	0	68,196	13.2	72,903	-4,707	0
4110	Holbrook, St. John's Church	83,986	5,003	3,003	2,000	2.4	7,001	-5,001	0
4120	Marsfield, Trinity Church	147,643	14,233	0	14,233	9.6	19,971	-5,737	0
4125	Milton, Church of Our Saviour	135,446	12,465	0	12,465	9.2	14,056	-1,591	0
4135	Quincy, Christ Church	174,676	18,153	0	18,153	10.4	17,301	852	5,000
4140	Quincy, Parish of St. Chrysostom	167,125	17,058	0	17,058	10.2	19,797	-2,739	0
4145	Randolph, Trinity Church	91,574	6,103	0	6,103	6.7	8,040	-1,937	0
4150	Rockland, Trinity Church	77,731	4,096	0	4,096	5.3	6,598	-2,502	0
4155	Scituate, St. Luke's Church	224,741	25,412	0	25,412	11.3	30,743	-5,331	0
4165	South Weymouth, Church of the Holy Nativity	130,662	11,771	0	11,771	9.0	14,378	-2,607	0
5130	Whitman, All Saints' Church	88,621	5,675	0	5,675	6.4	7,457	-1,782	0
TOTALS:		2,832,003	303,201	6,547	296,654	10.5	321,581	-24,928	10,000

TAUNTON RIVER

M	CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2018 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
5005	Attleborough, All Saints' Church	84,168	5,029	0	5,029	6.0	6,295	-1,265	1,448
5135	Bristol, Trinity Church	121,304	10,414	0	10,414	8.6	8,645	1,769	0
5010	Bridgewater, Trinity Church	92,993	6,309	0	6,309	6.8	8,509	-2,200	0
5060	Foxborough, St. Mark's Church	120,060	10,234	0	10,234	8.5	18,230	-7,996	0
3070	Franklin, St. John's Church	118,955	10,073	0	10,073	8.5	9,851	222	0
5075	Middleborough, Church of Our Saviour	137,009	12,691	0	12,691	9.3	15,062	-2,371	0
5095	North Attleborough, Grace Church	164,756	16,715	0	16,715	10.1	18,230	-1,515	0
5125	Taunton, St. Thomas's Church	271,860	32,245	0	32,245	11.9	45,021	-12,776	0
3175	Wrentham, Trinity Church	159,827	16,000	0	16,000	10.0	15,907	93	0
TOTALS:		1,270,932	119,710	0	119,710	9.4	145,750	-26,040	1,448
DIOCESAN TOTALS:		40,372,140	4,785,255	39,896	4,745,359	11.8	5,139,654	-394,294	75,000

GUIDE TO AREA EXPENSE TABLES

The following charts and cost center descriptions provide detail for each area of the 2018 budget. Each area of the budget is shown as follows: 2018 proposed budget with the 2017 budget (top) and the 2016 actuals (bottom) for comparison. Each row is identified by a specific cost center code and description.

Operational Budget Areas

The Operational Budget is divided into four areas: Support of Wider Church; Support for Congregations; Episcopate and Convention; and Facilities and Administration. The chart for the first area, Support of Wider Church, provides the expense for each cost center. For the other three areas, the first row provides an aggregate number for staff compensation. There are five columns of figures that break down each cost center into the following components:

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

Compensation and Benefits: All compensation and benefit-related expenses, including 1099 payments to independent contractors. Salary and benefits for diocesan staff reflect a 2% increase and an estimated 6% increase in the cost of health care coverage for 2018.

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

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

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

Strategic Budget Areas

There are three areas within the Strategic Budget: Congregational Grants and Direct Support; Support for Clergy; and Strategic Ministries. Each row is identified by a cost center code and description. These line items are then broken down according to the sources from which their funding has been allocated: Assessments; Agency Fund or Trust Fund Draws; Bishop's Directed Funds; Annual Fund; Contributions; Grants; In-Kind; and Fee Revenue.

Support of Wider Church - Operational Budget (see table on page 23)

The total 2018 budget for this area is \$926,280, all of which is recorded under the Operational Budget. The 2017 core and supplemental budget total was \$926,280.

• Massachusetts Council of Churches: 4251

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

• Province I Assessment: 4421

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

• Episcopal Church Asking: 4431

At the 2015 General Convention, the Episcopal Church set a sliding schedule of diocesan ask rates for the subsequent three years as follows: 18% in 2016, 16.5% in 2017 and 15% in 2018. As part of this new schedule, the diocese elected in 2016 to use the three-year average rate in 2016-2018 to determine the assessment amount budgeted for each of the three years. In 2017 the budgeted amount is \$860,101, which is the pro-rated amount for the year. Following this process, the diocese is committed for the 2018 budget to using the same dollar amount in its preparation.

Congregational Grants and Direct Support - Strategic Budget (see table on page 25)

The total 2018 budget for this area is \$476,188, all of which is recorded under the Strategic Budget. The 2017 core and supplemental budget total was \$519,439.

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

Congregational Development Targeted Grants have been level funded at \$60,000.

Congregational Development Open Grants are funded at \$110,000, which is a \$40,000 decrease from 2017.

• **Bristol County Case Grants: 2013**

The draw for this grant program is \$136,477. The intended uses of the fund's income when it was established as part of the diocesan endowment include service to Bristol County residents in need, as well as the general and religious purposes of the diocese.

• **Congregational Program Grants: 2014**

This cost center contains specific grants to congregations funded by agency or trust endowments or supplemental sources. In the budget, agency endowments support grants to St. John's, Sharon (\$21,768), Christ Church, Plymouth (\$3,243) and Emmanuel Church, West Roxbury (\$3,992). A trust fund provides a grant to Emmanuel Church, Boston (\$7,691).

• **Deaf Ministry Grants: 2015**

This cost center represents a continuation, for the time being, of the deaf ministry grants program begun in 2011. The amount budgeted is a draw from the remainder of the diocesan agency fund (7004H) that in previous years supported the St. Andrew's of the Deaf congregation in Natick, which closed in 2011. It is level funded at \$8,000. The use of the proceeds from this closed congregation will be determined by Diocesan Council.

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

Each of the 12 deaneries is charged with running a grants program to support outreach activities. Deanery assemblies set the criteria and determine awards. The amounts available to each deanery, funded by two specific diocesan funds, are \$4,000 for Sending Serving grants, which require a match from grant recipients and are open to any outreach activity, and \$2,668 for House of Mercy grants, which require a focus on women and children in need (no match necessary). The funding sources for the House of Mercy grants are agency endowment 7002Y.

• **Hispanic Ministries: 2031**

The 2018 budget for this grant program to support Hispanic ministries in congregations is \$25,000.

• **African Ministries: 3431**

The budget for grants to African congregations is funded at \$20,000 in 2018.

A chart of congregational grants for 2016 is on pages 60-63.

Congregational Grants and Direct Support- Strategic 2018 Budget 2017 Budget and 2016 Actual							
	2018 Budget			Total Budget Expenses (Gross)	Program Revenue Offset	Total Budget Expenses (Net)	2017 Budget Total Expenses (Gross)
	Program Expenses	Operational & Support Svcs	Total Expenses (Gross)				
2018 and 2017 Budget							
CC2011 Cong Dev Open Grants	110,000	-	110,000	-	110,000	150,000	
CC2012 Cong Dev Targeted Grants	60,000	-	60,000	-	60,000	60,000	
CC2013 Bristol County Case Fund Grants	136,477	-	136,477	-	136,477	135,162	
CC2014 Congregational Program Grants	36,694	-	36,694	-	36,694	36,574	
CC2015 Deaf Ministry Grants	8,000	-	8,000	-	8,000	8,000	
CC2021 Sending Serving Grants	48,000	-	48,000	-	48,000	48,000	
CC2022 House of Mercy Grants	32,017	-	32,017	-	32,017	31,703	
CC2031 Hispanic Ministries	25,000	-	25,000	-	25,000	25,000	
CC3431 African Ministries	20,000	-	20,000	-	20,000	25,000	
Totals	476,188	-	476,188	-	476,188	519,439	
	2016 Actual						
	Program Expenses	Operational & Support Svcs	Total Expenses (Gross)	Revenue Offset	Total Expenses (Net)		
CC2011 Cong Dev Open Grants	137,948	-	137,948	-	137,948		
CC2012 Cong Dev Targeted Grants	49,280	-	49,280	-	49,280		
CC2013 Bristol County Case Fund Grants	132,784	18	132,802	-	132,802		
CC2014 Congregational Program Grants	35,000	-	35,000	-	35,000		
CC2015 Deaf Ministry Grants	6,400	-	6,400	-	6,400		
CC2021 Sending Serving Grants	42,701	-	42,701	-	42,701		
CC2022 House of Mercy Grants	27,974	-	27,974	-	27,974		
CC2031 Hispanic Ministries	21,634	-	21,634	(1,634)	20,000		
CC3431 African Ministries	20,000	180	20,180	-	20,180		
	473,721	198	473,919	(1,634)	472,285		

Support for Clergy: Strategic Budget (see table on page 27)

The total 2018 budget for this area is \$96,982, all of which is recorded under the Strategic Budget. The 2017 core and supplemental budget total was \$116,892.

• **Congregations: 1101**

In the budget there is a total of \$20,000 for mentoring of newly ordained clergy by the Making Excellent Disciples program from the Bishop's Directed Funds.

• **Sabbaticals: 1211**

The funds totaling \$26,645 for clergy sabbaticals come from two sources: an agency endowment fund in honor of Bishop Norman Nash (\$9,145) and a Bishop's Directed Funds grant (\$17,500).

• **Scholarships for Clergy Dependents: 1221**

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

• **Support for Retired Clergy: 1231**

The Society for the Relief of Aged or Disabled Episcopal Clergy and the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Episcopal Church both receive distributions from agency funds as well as from trust funds where the organizations are named as income beneficiaries. These distributions help retired clergy and widows, widowers and orphans of clergy. The books and records of these two organizations, because they are separate 501(c)(3) organizations, are not part of the diocesan budget. Because retired clergy and their families are living longer, the funds from the agency and trust funds need funding support. The 2018 budget allocates \$17,000, \$5,300 for program and support expenses, including gatherings, and \$11,700 for additional grants. The Bishop's Directed Funds provide \$5,500 of this funding.

Support for Clergy Strategic						
2018 Budget 2017 Budget and 2016 Actual						
	2018 Budget			2017 Budget		
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)
<u>2018 and 2017 Budget</u>						Total Expenses (Gross)
CC1101 Congregations - Making Excellent Disciples	20,000	-	-	20,000	-	20,000
CC1211 Sabbaticals	26,645	-	-	26,645	-	26,555
CC1221 Scholarships for Clergy Dependents	33,337	-	-	33,337	-	33,337
CC1231 Support for Retired Clergy	17,000	-	-	17,000	-	37,000
Totals	96,982	-	-	96,982	-	116,892
2016 Actual						
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Expenses (Net)
CC1101 Congregations - Making Excellent Disciples	18,032	-	-	18,032	-	18,032
CC1211 Sabbaticals	24,927	-	-	24,927	-	24,927
CC1221 Clergy Dependent Scholarships	47,046	-	-	47,046	-	47,046
CC1231 Support for Retired Clergy	55	-	4,240	4,295	-	4,295
Totals	90,060	-	4,240	94,300	-	94,300

Support for Congregations: Operational Budget (see tables on pages 30 and 31)

The total net 2018 budget for this area is \$1,088,456. The 2017 core and supplemental budget total was \$1,401,770.

• **Support for Congregations: 1000**

This line contains the total compensation costs of \$747,965. The mission hubs program director is paid from Together Now campaign funds.

• **Congregations: 1101**

The \$12,000 in the Operational Budget funds the priests-in-charge consultants program

• **Transition Ministries: 1111**

Level funded at \$10,000, for supporting expenses for the transition ministries.

• **Clergy: 1201**

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

• **Continuing Education: 1212**

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

• **Massachusetts Scholarships for African Students in America: 1213**

Spending policy income of \$11,531 is available for a scholarship program for students from Africa.

• **Dill Campership: 1223**

The spending policy income of \$3,379 is from a restricted Bishop's Directed Fund to support a scholarship to Camp O-At-Ka in Maine.

• **Commission on Ministry: 1311**

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

• **Seminarians: 1312**

Scholarships for seminarians in the ordination process. The amount of \$63,907 is the spending policy income from an agency endowment fund for this purpose.

• **Fresh Start/New Call: 1321**

A total of \$8,333 for curriculum revision and leader training. This is the final year of a three-year matching grant.

• **Diaconate Program: 1331**

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

• **Clergy Family Network: 1341**

An amount of \$1,000, based on 2017 actuals.

- Pre-Lenten Retreat: 1411

Net costs to the operational budget, after fees are budgeted at \$3,000, based on 2017 actuals.

- Coburn Fund: 2001

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

- CRT Workshops: 2131

The total cost of \$6,500 for the various workshops and congregational resources and training offered throughout the diocese, \$2,000 of which is offset by fees collected.

- Antiracism: 2132

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

- Safe Church: 2133

A net of \$4,000 for online and in-person trainings on safe behaviors: \$7,000 in total cost, \$3,000 is offset by fees.

- Resource Center: 2151

The amount of \$500 stocks and renews the materials in the Resource Center.

- Congregational Consultants: 2161

The amount of \$18,000 for congregational consultants, who help congregations with best practices in many areas, including finances, buildings, leadership and stewardship.

- Congregation Support: 2211

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

- Program Support: 2221

The amount of \$6,300 covers various workshop and training programs. An amount of \$2,000 is collected in fees.

- Family Camp: 2222

Family Camp is essentially a break-even operation.

- Committee Support: 2231

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

- Diocesan Communications: 2311, 2312

The 2018 budget is funded at \$42,000, which is a decrease of \$10,000 from 2017, and more closely matches actual expenditures.

Support for Congregations- Operations									
2018 Budget 2017 Budget and 2016 Actual									
2018 and 2017 Budget	2018 Budget						2017 Budget		
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses (Gross)	
CC1000 Support for Congregations	-	747,965	-	-	747,965	-	747,965	1,031,667	
CC1101 Congregations	12,000	-	-	-	12,000	-	12,000	4,000	
CC1111 Transition Ministries	-	-	10,000	-	10,000	-	10,000	10,000	
CC1201 Clergy	-	-	-	2,000	2,000	(2,000)	-	2,000	
CC1212 Continuing Education	10,000	-	-	-	10,000	-	10,000	10,000	
CC1213 Mass. Scholarship for African Students in America	11,531	-	-	-	11,531	-	11,531	11,418	
CC1223 Dill Campership	3,379	-	-	-	3,379	-	3,379	3,359	
CC1311 Commission on Ministry	36,000	-	18,000	-	54,000	(7,000)	47,000	54,000	
CC1312 Seminarans	63,907	-	-	-	63,907	-	63,907	63,363	
CC1321 Fresh Start / New Call	8,333	-	-	-	8,333	-	8,333	16,666	
CC1331 Diaconate Program	-	-	19,000	3,000	22,000	(2,000)	20,000	13,000	
CC1341 Clergy Family Network	1,000	-	-	-	1,000	-	1,000	1,000	
CC1411 Pre Lenten Retreat	-	-	4,600	1,800	6,400	(3,400)	3,000	6,400	
CC2001 Coburn Fund	55,433	-	-	-	55,433	-	55,433	54,889	
CC2131 CRT Workshops	6,500	-	-	-	6,500	(2,000)	4,500	9,000	
CC2132 Anti-Racism	3,000	-	-	-	3,000	(700)	2,300	3,000	
CC2133 Safe Church	7,000	-	-	-	7,000	(3,000)	4,000	7,000	
CC2151 Resource Center	500	-	-	-	500	-	500	500	
CC2161 Congregational Consultants	-	-	18,000	-	18,000	-	18,000	10,000	
CC2211 Congregation Support	-	-	-	9,000	9,000	-	9,000	9,000	
CC2221 Program Support	6,300	-	-	-	6,300	(2,000)	4,300	41,300	
CC2222 Family Camp	308	-	-	-	308	-	308	308	
CC2231 Committee Support	-	-	10,000	-	10,000	-	10,000	10,000	
CC2311 Diocesan Communications	-	-	40,000	-	40,000	-	40,000	50,000	
CC2312 FYI Newsletter	-	-	2,000	-	2,000	-	2,000	2,000	
Totals	225,191	747,965	121,600	15,800	1,110,556	(22,100)	1,088,456	1,423,870	

Support for Congregations- Operations 2018 Budget 2017 Budget and 2016 Actual						
	2016 Actual					
2016 Actual	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Total Expenses (Net)
CC1000 DC & C	-	540,355	-	-	540,355	540,355
CC1001 Deaneries	-	-	3,611	-	3,611	3,611
CC1002 Deans	48,000	-	-	-	48,000	48,000
CC1003 Deanery Confirmations	1,000	1,200	5,309	40	7,549	7,549
CC1101 Congregations	-	7,200	88	-	7,288	7,124
CC1111 Transition Ministries	-	1,960	11,545	-	13,505	13,505
CC1201 Clergy	-	-	35	2,800	2,835	190
CC1212 Continuing Education	8,521	-	-	-	8,521	8,521
CC1213 MSASA EDS	11,121	-	-	-	11,121	11,121
CC1223 Dill Campership	-	-	-	-	-	-
CC1311 Commission on Ministry	34,350	6,029	33,237	9,261	82,877	73,062
CC1312 Seminararians	62,160	-	-	-	62,160	54,141
CC1321 Fresh Start Program	4,020	200	4,206	-	8,426	8,426
CC1331 Diaconate Program	1,033	14,623	18,413	-	34,069	34,069
CC1341 Clergy Family Network	-	-	-	-	-	-
CC1411 Pre Lenten Retreat	-	2,000	4,682	44	6,726	3,606
CC1421 Clergy Conference	-	300	125,266	770	126,336	56,333
CC1431 Clergy Day	-	-	3,448	81	3,529	134
CC2000 CR & T	-	638,044	-	-	638,044	638,044
CC2031 Hispanic Ministries	-	769	-	-	769	(865)
CC2111 CRT Events	26	-	254	-	280	280
CC2112 Spring Learning Event	1,798	1,500	949	150	4,397	719
CC2113 Resource Day	215	-	6,677	94	6,986	3,257
CC2131 CRT Workshops	641	227	2,768	9	3,645	3,075
CC2132 Anti-Racism	318	-	3,802	25	4,145	2,995
CC2133 Safe Church	-	6,781	2,409	52	9,242	6,635
CC2151 Resource Center	404	-	478	-	882	882
CC2161 Congregational Consultants	212	10,144	5,664	54	16,074	13,744
CC2200 CRT Support	41	-	1,135	-	1,176	1,176
CC2211 Congregation Support	-	-	5,873	1,629	7,502	7,502
CC2221 Program Support	25,737	770	6,726	60	33,293	30,393
CC2222 Family Camp	-	-	25	-	25	25
CC2231 Committee Support	159	-	2,932	-	3,091	3,091
CC2311 Diocesan Communications	3,504	678	33,688	-	37,870	37,870
CC2312 FYI Newsletter	115	-	2,453	-	2,568	2,568
CC3011 Youth Ministry	56,263	118,106	3,055	307	177,731	148,986
CC3012 Youth Leadership Academy	39,253	3,000	8,018	-	50,271	5,332
Totals	298,891	1,353,886	296,746	15,376	1,964,899	1,775,456

Strategic Ministries: Strategic Budget (see tables on pages 36 and 37)

The total net 2018 budget for this area is \$2,220,308. The 2017 core and supplemental budget total was \$2,215,053.

• **Congregational Program Grants: 2014**

An amount of \$10,000 is allotted to St. Stephen's Church, Lynn for its KIDS in Community summer program and \$30,000 to Grace Church, Everett. An additional \$40,000 is budgeted as the matching portion of an Episcopal Church Mission Enterprise Zone grant.

• **Strategic Ministries: 3000**

This funds two full-time staff to support congregation networking and ministry design.

• **Deaneries: 1001; Deans: 1002**

An amount of \$400 per deanery to support deanery assembly activities; \$1,500 per deanery to offset deans' time and expenses, and hospitality expenses for Confirmations.

• **Clergy Conference: 1421**

This three-day event is budgeted at \$115,000, of which \$60,000 is covered by attendee fees.

• **Clergy Day: 1431**

This one-day event is budgeted at \$3,000, of which \$2,000 is covered by fees, leaving a budget balance of \$1,000.

• **Spring Learning Event: 2112**

The amount for 2018 is \$5,000, with \$1,500 in participant fees, for a net expense of \$3,500.

• **Resource Day: 2113**

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

• **Youth Ministry, Youth Leadership Academy: 3011, 3012**

The amount for the diocesan youth ministry includes the compensation and benefits for the director of youth ministry along with \$72,500 for program and operational services. Fees collected are \$30,000. The Youth Leadership Academy is budgeted at \$53,000; \$40,000 is collected in fees.

• **Life Together: 3056**

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

- Work for social justice in 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
- Live in intentional community with one another.

Eighty percent of alumni serve in some capacity in their churches and communities. Thirty percent of Life Together fellows continue on to ordination in the Episcopal Church and other Christian denominations. Eight alumni are currently discerning ordination in the Diocese of Massachusetts. In the 2017-2018 program year, Life Together will host 22 young adults in four intentional communities across eastern Massachusetts:

- Micah Fellows are first-year fellows based in the greater-Boston area.
- Emmaus Fellows, second-year fellows based in the greater-Boston area, focus on deepening the capacity of site partners and the individual formation of the fellows.
- Esperanza Academy Teaching Fellows—This is a partnership between Life Together and Esperanza Academy, located in Lawrence, focused on training teachers and leaders who want to work for change through the education system. The Esperanza Academy Teaching Fellows teach classes, work and coach in the extended-day program of the school as well as joining the Boston fellows for monthly leadership trainings. They also live together in intentional community.

Funding: Over the past five years, Life Together has built strong partnerships to secure substantial outside funding, resulting in a diverse and balanced funding structure. Including in-kind estimates, the total budget for the coming year is \$700,000. The plan for securing the needed revenue is:

- Site fees of \$252,000 (an average of \$11,455 per intern)
- External grants totaling \$90,000
- Annual fundraising campaign and event led by staff and fellows to net \$90,000
- Rental income of \$3,000
- Diocesan budget contribution of \$75,000
- Bishop's Directed Fund contribution of \$25,000
- Annual Fund contribution of \$100,000
- In-kind housing worth \$65,000 for office space and intentional community housing.

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

Housing: Four deaneries across the diocese host intentional communities of Life Together fellows. In the 2017-2018 program year, two intentional communities will continue to be housed in diocesan properties (40 Prescott Street in Brookline and 7 St. Luke's Road in Allston). Since this is a year-to-year arrangement and since the total number of interns can change, for the purpose of understanding the cost model of the program, this budget includes the in-kind value of housing provided this year by diocesan property. Life Together has begun a new partnership this year with St. Michael's Church in Milton, where six fellows will live this fall in a property on the church grounds. The Esperanza Teaching Fellows live in a house owned by Esperanza Academy.

• **MIT Campus Ministry: 3111**

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$128,934) plus program expenses of \$3,293. The ministry may raise additional funds through the MIT development office. In addition to two agency endowment funds that support campus ministry in general, an additional agency fund and a Bishop's Directed Fund provide support for the MIT ministry.

• **Boston University Campus Ministry: 3121**

The Boston University campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$78,000) plus program expenses of \$2,000.

• **Boston College-Northeastern University Campus Ministries: 3136**

In 2018 each school will have its own part-time chaplain, and the shared cost center 3136 provides for the salary, expenses and benefits (\$118,797) for both combined. Each of these campus ministry programs is allotted \$5,000 for program support.

- **Tufts University Ministry: 3171**

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

- **Grace Chapel, Brockton: 3221**

A congregation, Grace Chapel, worships and has office space in the First Lutheran Church in Brockton. Proceeds from the sale of the former St. Paul's Church and condo in Brockton were used, by vote of Diocesan Council, to fund Grace Chapel. These remaining sale proceeds were fully depleted in 2017. The 2018 budget includes the compensation for Grace Chapel's priest and two part-time lay employee salaries (\$145,553).

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

Level funding is provided in the 2018 budget for grants directly to congregations to help pay their clergy, as follows: St. Luke's-San Lucas, Chelsea, \$66,000; and Christ Church/Iglesia de San Juan, Hyde Park, \$44,000; and for the compensation and benefits paid directly to the vicar at St. Stephen's Church, Boston (\$143,903).

- **Boston Chinese Ministries: 3311**

The Operational Budget provides the half-time compensation and benefits for the canon for Asiamerican ministries (\$50,000) plus program expenses of \$26,900. The two Cantonese congregations raise additional funds for their ministries through contributions and grants (projected at \$44,500).

- **St. Mary's, Dorchester: 3331**

The amount of \$40,000 to support part of a full-time clergy salary from the BDF's.

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

The \$21,500 grant in the 2018 budget will help the San Pedro-St. Peter's congregation, both Hispanic and Anglo, to follow its strategic plan begun in 2016 that would have it increasingly viable over the next four years.

- **Grace Church, Lawrence: 3351**

The \$60,000 grant in the 2018 budget supports part of the salary of a Hispanic priest who ministers to all members of the congregation. Grace has been asked to develop a strategic plan.

- **Church of the Good Shepherd, Watertown: 3361**

With funds from proceeds from the sale of closed churches, the Church of the Good Shepherd has developed a long-range plan and a model for church restarts. Funding from closed church proceeds is no longer available, so a grant of \$15,000 to support part of a clergy salary is funded in the budget.

- **Dartmouth, St. Peter's—The Bridge: 3371**

Funding is to support an initiative of St. Peter's Church in Dartmouth to provide mental health outpatient support services to the greater New Bedford area. The Bridge is housed at St. Peter's, staffed by professionals, serving a vital need in the community, and funded through diocesan support and independent fundraising. The \$45,000 here is for ongoing start-up costs to be repaid over time to the diocese. In addition, the Bishop's Directed Funds will be used for loans to St. Peter's -The Bridge from a fund dedicated to making loans to congregations. The business plan indicates self-sufficiency, with the ability to make payments on the loan during 2018.

- **Urban Resident Program: 3411**

The Urban Resident 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.

- **Sustainable Development Grants: 3511**

The budget shows a renewed commitment of 0.7% to fund Sustainable Development Grants through the Jubilee Ministry, set at \$33,076. In addition, there is approximately \$60,000 available from prior years' fundraising, of which \$18,936 is budgeted for use in 2018. Jubilee oversees global mission partnerships.

- **Middle East Network Committee: 3531**

This funding is to plan and organize the annual pilgrimage to the Middle East, led by Bishop Gayle Harris. The trip expenses are self funding. In 2018, it is expected that the planning costs will come from Together Now funds designated for global partnerships.

- **B-SAFE: 3541**

The B-SAFE program is an important outreach and partnership opportunity with children 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 2018 the program is budgeted a diocesan contribution of \$225,000 from appropriate diocesan and bishop's resources.

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

Established by Diocesan Convention in 2012, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge campaign is funded at \$40,000 from Bishop's Directed Funds. The campaign has narrowed its focus to youth jobs and gun law reform. Volunteers from across the diocese, as well as interfaith and civic partners, are committed to the campaign's projects to help end violence.

- **Mission Through Partnerships: 3551**

An amount of \$6,000 to support the travel costs of the deacon for mission. In 2018 this program is funded by Together Now funds.

- **The Cathedral: The Crossing and Cathedral Ministry with the Homeless: 3911**

A \$49,000 grant is budgeted to support the work of The Crossing congregation at the Cathedral Church of St. Paul, and to support work with MANNA and the homeless by the cathedral's associate minister. The Cathedral Chapter decides how the grant is distributed.

- **Barbara C. Harris Center: 3921**

A \$1,975 grant will be given out of an agency endowment fund.

- **Episcopal City Mission: 3931**

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

- **United Thank Offering: 3952**

This \$1,765 supports the Native American Lillian Vallely School in Idaho.

- **Diocesan Youth Council: 4131**

This \$7,500 supports the work of the Diocesan Youth Council.

**Strategic Ministries - Strategic
2018 Budget, 2017 Budget and 2016 Actual**

	2018 Budget							2017 Budget	
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total 2018 Budget (Net)	Total Expenses (Gross)	
CC2014 Congregational Program Grants - Everett, Lynn	40,000	-	-	-	40,000	-	40,000	35,000	
CC2014 Congregational Program Grants - MEZ Lynn	40,000	-	-	-	40,000	-	40,000	-	
CC3000 Strategic Ministries	-	260,000	-	-	260,000	-	260,000	-	
CC1001 Deaneries	-	-	4,800	-	4,800	-	4,800	4,800	
CC1002 Deans	18,000	-	-	-	18,000	-	18,000	48,000	
CC1003 Deanery Confirmations	-	-	-	-	-	-	-	12,000	
CC1421 Clergy Conference	-	115,000	-	-	115,000	(60,000)	55,000	103,000	
CC1431 Clergy Day	3,000	-	-	-	3,000	(2,000)	1,000	3,000	
CC2112 Spring Learning Event	4,000	-	1,000	-	5,000	(1,500)	3,500	5,000	
CC2113 Resource Day	10,000	-	1,500	-	11,500	(4,000)	7,500	10,500	
CC3011 Youth Ministry	67,500	103,312	5,000	-	175,812	(30,000)	145,812	242,662	
CC3012 Youth Leadership Academy	47,000	-	6,000	-	53,000	(40,000)	13,000	53,000	
CC3056 Life Together	46,700	509,300	144,000	-	700,000	(500,000)	200,000	709,000	
CC3111 MIT Ministry	3,293	128,934	-	-	132,227	-	132,227	127,864	
CC3121 Boston University	2,000	78,000	-	-	80,000	-	80,000	56,278	
CC3136 BC/ NU Combined	10,000	118,797	-	-	128,797	-	128,797	129,058	
CC3171 Tufts University Ministry	14,000	-	-	-	14,000	-	14,000	-	
CC3221 Brockton, Grace Chapel	-	145,553	-	-	145,553	-	145,553	114,006	
CC3231 Chelsea, St. Luke's/ San Lucas	66,000	-	-	-	66,000	-	66,000	66,000	
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	44,000	-	44,000	44,000	
CC3251 South End, St. Stephen's	-	143,903	-	-	143,903	-	143,903	138,898	
CC3311 Boston Chinese Ministries	26,900	50,000	-	-	76,900	(44,500)	32,400	153,328	
CC3331 Dorchester, St. Mary's	40,000	-	-	-	40,000	-	40,000	50,000	
CC3341 Salem, San Pedro	21,500	-	-	-	21,500	-	21,500	65,000	
CC3351 Lawrence, Grace Church	60,000	-	-	-	60,000	-	60,000	60,000	
CC3361 Watertown, Good Shepherd	15,000	-	-	-	15,000	-	15,000	30,000	
CC3371 So. Dartmouth, St. Peter's The Bridge	45,000	-	-	-	45,000	-	45,000	45,000	
CC3411 Urban Residents	75,000	-	-	-	75,000	-	75,000	75,000	
CC3411 Urban Residents	-	-	-	-	-	-	-	11,719	
CC3511 Sustainable Development Grants	15,000	31,377	5,635	-	52,012	(18,936)	33,076	124,359	
CC3531 Middle East Network Committee	-	-	-	-	-	-	-	1,000	
CC3541 B-SAFE	225,000	-	-	-	225,000	-	225,000	250,000	
CC3545 B-PEACE	40,000	-	-	-	40,000	-	40,000	50,000	
CC3551 Mission Through Partnerships	-	-	-	-	-	-	-	6,000	
CC3911 Cathedral Church of St Paul	49,000	-	-	-	49,000	-	49,000	77,000	
CC3921 Barbara C. Harris Center	1,975	-	-	-	1,975	-	1,975	1,956	
CC3931 Episcopal City Mission	30,000	-	-	-	30,000	-	30,000	30,000	
CC3952 UTO/ American Indians /CHS	1,765	-	-	-	1,765	-	1,765	1,748	
CC4131 Diocesan Youth Council	7,500	-	-	-	7,500	-	7,500	6,000	
Total - Strategic	1,069,133	1,569,176	282,935	-	2,921,244	(700,936)	2,220,308	2,954,176	

Strategic Ministries - Strategic									
2018 Budget, 2017 Budget and 2016 Actual									
	2016 Actual								
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Transfers	Total Expenses (Gross)	Program Revenue Offset	Total 2018 Budget (Net)	
2016 Actual									
CC3056 Life Together	-	-	-	-	75,000	75,000	-	75,000	
CC3111 MIT Ministry	51	131,330	910	3,108	-	135,399	(13,325)	122,074	
CC3121 Boston University	544	53,451	4,261	-	-	58,256	-	58,256	
CC3136 BC/ NU Combined	8,046	109,285	2,283	-	-	119,614	-	119,614	
CC3141 Northeastern	-	-	-	-	-	-	-	-	
CC3171 Tufts University Ministry	14,000	-	-	-	-	14,000	-	14,000	
CC3231 Chelsea, St. Luke's/ San Lucas	66,000	-	-	-	-	66,000	-	66,000	
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	-	44,000	-	44,000	
CC3251 South End, St. Stephen's	-	130,610	-	-	-	130,610	-	130,610	
CC3311 Boston Cantonese Ministries	-	91,695	-	-	-	91,695	-	91,695	
CC3341 Salem, San Pedro	65,000	-	-	-	-	65,000	-	65,000	
CC3351 Lawrence, Grace Church	60,000	-	-	-	-	60,000	-	60,000	
CC3411 Urban Residents	75,000	-	-	-	-	75,000	-	75,000	
CC3511 Jubilee Global Mission	-	-	-	-	42,686	42,686	-	42,686	
CC3531 Committee on Palestine & Israel	-	-	716	-	-	716	-	716	
CC3551 Mission Through Partnerships	-	1,235	1,682	-	-	2,917	-	2,917	
CC3921 Barbara C. Harris Center	-	-	435	-	-	435	-	435	
CC3931 Episcopal City Mission	30,000	-	-	-	-	30,000	-	30,000	
CC3952 UTO/ American Indians /CHS	1,703	-	-	-	-	1,703	-	1,703	
Totals	364,344	517,606	10,287	3,108	117,686	1,013,031	(13,325)	999,706	
2016 Actual									
						Total Expenses (Gross)			
CC3056 Life Together	14,080	410,151	273,844	12,303	(75,000)	635,378			
CC3221 Brockton, Grace Chapel	-	107,777	-	-	-	107,777			
CC3311 Boston Chinese Congregation	14,117	22,780	-	30	-	36,927			
CC3321 Quincy Chinese Congregation	3,000	-	-	-	-	3,000			
CC3331 Dorchester, St. Mary's	50,000	-	-	-	-	50,000			
CC3361 Watertown, Good Shepherd	45,000	-	-	-	-	45,000			
CC3371 So. Dartmouth, St. Peter's The Bridge	26,179	172,142	21,052	3,007	-	222,380			
CC3411 Urban Residents	-	-	-	-	-	-			
CC3511 Jubilee Global Mission	12,897	19,896	9,810	83	(42,686)	-			
CC3541 B-SAFE	225,000	-	-	-	-	225,000			
CC3545 B-PEACE	50,000	-	90	-	-	50,090			
CC3911 Cathedral Church of St Paul	71,000	-	-	-	-	71,000			
Totals	511,273	732,746	304,796	15,423	(117,686)	1,446,552			
TOTAL	875,617	1,250,352	315,083	18,531	-	2,459,583			

Episcopate and Convention: Operational Budget (see table on page 40)

The total 2018 net budget for this area is \$1,579,817. The 2017 core and supplemental budget total was \$1,591,487.

• **Area Staff and Expenses: 4000**

This line includes compensation for three administrative support positions; others are included in individual cost centers.

• **Diocesan Leadership: 4011, 4012, 4014**

These three cost center codes carry the compensation for the diocesan bishop, the bishop suffragan and the canon to the ordinary, and their expense budgets. The diocesan bishop's compensation follows Total Clergy Compensation (TCC) guidelines, including the value of living in diocesan-owned housing. Also see cost center 5125.

• **Assisting Bishops: 4021**

Stipends and costs for assisting bishops, as needed (\$30,000).

• **New Bishop Transition Reserve: 4023**

In January 2015, Diocesan Council established a long-term fund and seeded it with \$250,000 to pay for the costs associated with discernment, election and transition. Council's goal is to contribute \$50,000 per year out of the Operational Budget. This year's contribution is set at \$30,000, which will be added to the \$250,000 extraordinary allocation that Council voted in January 2015, along with subsequent contributions, bringing the total balance in the reserve to \$390,000.

• **Chancellor: 4031**

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

• **Title IV: 4061**

Canonical clergy disciplinary process, budgeted at \$20,000 for 2018. This includes \$2,000 stipends for two non-staff intake officers.

• **Diocesan Leadership Budgeted Reserve: 4099**

The entire budgeted amount of \$144,822 for 2018 represents funding for contingencies, staff sabbatical coverage and potential staff compensation increases based upon changed responsibilities.

• **Diocesan Council: 4111; Standing Committee: 4121**

The 2018 amounts budgeted are \$10,000 for Diocesan Council and \$3,000 for Standing Committee.

• **Mission Strategy: 4112**

An amount of \$50,000 to fund the process of developing a new mission strategy for Diocesan Convention as required by canon.

• **Diocesan Convention: 4141**

The \$45,000 net costs budgeted for 2018 assume a two-day convention, and includes costs for voting and electronic equipment rental.

- **Journals and Diocesan Directory: 4151**

This line is funded at \$12,000.

- **Archives: 4211**

An amount of \$25,000 for operational expenses. This includes stipends as part of college training for students that participate in the Archives program.

- **Development Office: 4311**

Development staff compensation includes the compensation for the director of development and a part-time assistant. An additional \$35,000 is budgeted for events and other expenses.

- **Annual Fund: 4312**

Projected expenses for 2018 are \$30,000.

- **Ecumenical Committee: 4261**

Budgeted at \$1,500.

- **General Convention: 4411**

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

Episcopate and Convention - Operations									
2018 Budget, 2017 Budget and 2016 Actual									
	2018 Budget					2017 Budget			
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Program Revenue Offset	Total Budget (Net)	Total Expenses (Gross)	Total Expenses (Gross)
2018 and 2017 Budget									
CC4000 Episcopal and Diocesan Support	-	263,391	-	-	263,391	-	263,391	301,189	301,189
CC4011 Diocesan Bishop	-	240,583	57,500	-	298,083	-	298,083	293,717	293,717
CC4012 Suffragan Bishop	-	187,523	32,500	-	220,023	-	220,023	215,521	215,521
CC4014 Canon to the Ordinary	-	168,912	12,500	-	181,412	-	181,412	173,811	173,811
CC4021 Assisting Bishops	-	-	30,000	-	30,000	-	30,000	25,000	25,000
CC4023 New Bp Transition Reserve	-	-	30,000	-	30,000	-	30,000	30,000	30,000
CC4031 Chancellor	-	-	1,500	-	1,500	-	1,500	1,500	1,500
CC4061 Title IV	-	-	-	20,000	20,000	-	20,000	15,000	15,000
CC4099 Leadership Resources	-	-	114,822	30,000	144,822	-	144,822	197,876	197,876
CC4111 Diocesan Council	-	-	10,000	-	10,000	-	10,000	10,000	10,000
CC4112 Mission Strategies	50,000	-	-	-	50,000	-	50,000	-	-
CC4121 Standing Committee	-	-	3,000	-	3,000	-	3,000	3,000	3,000
CC4141 Diocesan Convention	25,000	-	25,000	-	50,000	(5,000)	45,000	50,000	50,000
CC4151 Journals and Diocesan Directory	-	-	12,000	-	12,000	-	12,000	12,000	12,000
CC4211 Archives	-	-	25,000	-	25,000	-	25,000	25,000	25,000
CC4311 Development	35,000	161,086	-	-	196,086	-	196,086	193,373	193,373
CC4312 Annual Fund	-	-	30,000	-	30,000	-	30,000	30,000	30,000
CC4261 Ecumenical Committee	-	-	1,500	-	1,500	-	1,500	1,500	1,500
CC4411 General Convention	-	-	18,000	-	18,000	-	18,000	18,000	18,000
Totals	110,000	1,021,495	403,322	50,000	1,584,817	(5,000)	1,579,817	1,596,487	1,596,487
2016 Actual									
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Expenses (Gross)	Revenue Offset	Total		
CC4000 Episcopal and Diocesan Support	-	88,060	-	-	88,060	-	88,060		
CC4011 Diocesan Bishop	415	235,444	74,693	-	310,552	(3,963)	306,589		
CC4012 Suffragan Bishop 1	1,158	178,678	44,264	55	224,155	-	224,155		
CC4014 Canon to the Ordinary	15	235,797	22,158	-	257,970	-	257,970		
CC4021 Assisting Bishops	-	18,660	9,664	-	28,324	-	28,324		
CC4022 Retired Bishops	-	-	465	-	465	-	465		
CC4031 Chancellor	-	-	-	3,731	3,731	-	3,731		
CC4061 Title IV	-	5,000	59	26,039	31,098	-	31,098		
CC4099 DL Budgeted Resources	-	125,008	1,061	-	126,069	-	126,069		
CC4111 Diocesan Council	920	225	17,796	-	18,941	-	18,941		
CC4112 Mission Strategy	3,049	15,156	7,185	3,822	29,212	-	29,212		
CC4121 Standing Committee	400	400	2,340	-	3,140	-	3,140		
CC4131 Diocesan Youth Council	9,513	-	388	-	9,901	(2,055)	7,846		
CC4141 Convention	778	145	62,253	395	63,571	(20,325)	43,246		
CC4151 Journals and Diocesan Directory	-	-	-	-	-	-	-		
CC4211 Archives	-	22,062	7,940	268	30,270	(700)	29,570		
CC4261 Ecumenical Committee	-	-	250	-	250	-	250		
CC4311 Development	-	158,690	18,913	4,688	182,291	-	182,291		
CC4312 Annual Fund	-	450	39,039	5	39,494	-	39,494		
CC4411 General Convention	-	-	-	-	-	-	-		
Totals	16,248	1,083,775	308,468	39,003	1,447,494	(27,043)	1,420,451		

Facilities and Administration: Operational Budget (see table on page 43)

The total 2018 net budget for this area is \$1,345,079. The 2017 core budget total was \$1,485,894.

• **Administrative Services: 5000**

This line contains compensation for assigned staff. This budget reflects the realignment of staff between departments, as well as a reduction in hours worked for certain staff.

• **Treasurer's Office: 5011**

This cost center includes support expenses of \$40,600 (office supplies, licenses, dues) along with outside service fees, including payroll and audit, totaling \$83,500. The cost center overall shows a net inflow, as the Treasurer's Office receives \$122,000 in fee income for financial and administrative services provided. The largest sources of fee income are the Cathedral Church of St. Paul (\$63,000) and the Trustees of Donations (\$34,000). In addition, the administrative services area receives \$25,000 per year from the Stokes Fund program to cover administrative costs associated with the loan program (see cost center 5511).

• **Human Resources: 5021**

Consultants supplement this function as needed (\$6,000).

• **Information Technology: 5031**

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**

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

• **Investments: 5051**

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) for making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2018 is \$6,000.

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

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

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

Cost of maintaining this property is budgeted at \$20,000. A part-time staff member is budgeted in the compensation section.

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

This cost center reflects \$15,000 in condominium fees for the bishop's residence offset by a credit of \$42,408 which reflects the reduction in the bishop's cash salary in exchange for diocesan-provided housing. The size of the credit was set using the Church Pension Fund's "30% rule."

- Allston property: 5125

The property reverted back to the diocese in 2009 after the Church of St. Luke and St. Margaret closed. The diocese has been paying for its upkeep ever since receiving direct title of the property. Bishop Gates, staff and Standing Committee continue to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The Operational Budget allocation for this property is \$34,000 in 2018. A part-time staff member also provides services and that cost is included in the compensation line. Some of this expense is offset by rental of the rectory to the Life Together program and by other occasional uses of the building by other groups who pay a fee for use of space.

- Diocesan Properties: 5141

This cost center includes \$10,000 for a consultants on the status and sales of diocesan properties and \$30,000 to be added to the reserve for property maintenance established formally by Diocesan Council in January 2015 and seeded with \$650,000, bringing the total in the reserve, before expenses, to \$720,000.

- Diocesan Equipment: 5142

An amount of \$12,500 to be added to a reserve fund to replace or purchase new capital equipment (computers, servers, copiers, etc.) formally established by Diocesan Council in 2015 and seeded with \$150,000. Net of purchases the balance of the fund at the end of the third quarter of 2017 was \$96,000.

Proceeds from Closed Congregations: Additional Information

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

The following congregations have closed in recent years:

- St. George's Church, Maynard - 2006
- Church of the Holy Trinity, Marlborough - 2008
- St. Luke's Church, Malden - 2008
- St. Andrew's Church, Belmont - 2008
- Church of St. Matthew and The Redeemer, South Boston - 2008
- St. Alban's Church, Lynn - 2009
- St. Augustine's Church, Lawrence - 2009
- St. David's Church, Halifax - 2009
- St. Paul's Church, Brockton - 2010
- St. Luke's and St. Margaret's Church, Allston - 2010
- St. Paul's Church, Millis - 2010
- St. Andrew's Church of the Deaf, Natick - 2011
- Trinity Church, Weymouth - 2013
- Christ Church, Somerville - 2013
- St. David's Church, Pepperell - 2013
- Church of the Holy Spirit, Wayland closed in 2016 but a final accounting of the proceeds awaits resolution.

In the transition surrounding a church closing, diocesan staff provide support and services of all kinds. At the end of the closing process, the remaining assets are transferred to the diocese, for Diocesan Council to allocate. In February 2011, Council created a new Fund for Congregational Vitality from 50% of the net proceeds for the above congregations (except Brockton). The balance of the fund as of June 30, 2017, was \$4,635,941. It produces \$161,200 for the Operational Budget to support congregational development around the diocese.

The remaining 50% has been available for distribution by Council. In early 2013, Council approved the appropriation of up to \$1.2 million from the remaining 50% of the uncommitted net proceeds to go toward a renovation project at St. Luke's-San Lucas in Chelsea for its food and clothing programs.

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

The table on page 46 shows status of the proceeds for 13 of the closed congregations:

Proceeds—Gross revenue from sales and transfers of endowments

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

Net Proceeds—Direct costs subtracted from proceeds

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

50% of Net Proceeds—50% of the net proceeds is invested in the Fund for Congregational Vitality; the other 50% is available for the stewardship process

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

- Malden: \$261,154 to help fund a clergy salary at St. John's Church, Saugus, where a majority of the Malden congregation now worships
- Belmont: \$289,894 to help fund a clergy salary, interns and program at the Church of the Good Shepherd, Watertown, an experiment in building family ministry, and to fund half an Urban Resident grant at St. James's Church, Cambridge. In addition, as part of its closing process, St. Andrew's Church, Belmont provided \$60,000 for the Ndumberi, Kenya, Mothers' Union, \$5,000 for expenses related to the Ndumberi grant and a \$10,000 grant to Jubilee Ministries to help administer the Ndumberi grant.
- South Boston: \$527,832 to St. Mary's Church, Dorchester, at the request of the closing church and the deanery, for building repair, and to pay for half of the cost of an Urban Resident

Available—As of June 30, 2017, the balance is \$8,154.

Episcopal Diocese of Massachusetts
Use of Proceeds from Closed Parishes Summary
As of June 30, 2017

<u>Parish</u>	<u>Gross Proceeds</u>	<u>Less Direct Costs</u>	<u>Net Proceeds</u>	<u>50% of Net Proceeds</u>	<u>Expended through 2014</u>	<u>Available</u>
Maynard	392,507	(156,858)	235,649	117,825	-	117,825
Marlborough	317,427	(56,205)	261,222	130,611	-	130,611
Malden	611,007	(88,698)	522,309	261,154	(261,154)	-
Belmont	1,106,318	(39,797)	1,066,521	533,261	(349,894)	183,367
South Boston	1,106,939	(51,276)	1,055,664	527,832	(527,832)	-
Lynn	619,978	(153,451)	466,527	233,264	-	233,264
Lawrence	202,609	(73,837)	128,772	64,386	-	64,386
Halifax	249,880	(81,169)	168,711	84,356	-	84,356
Mills	448,030	(89,640)	358,390	179,195	-	179,195
Natick	255,287	(12,063)	243,224	121,612	-	121,612
Weymouth	667,724	(175,760)	491,964	245,982	-	245,982
Somerville	746,280	(84,411)	661,869	330,935	-	330,935
Pepperell	160,388	(119,742)	40,646	20,323	-	20,323
	6,884,374	(1,182,907)	5,701,468	2,850,734	(1,138,880)	1,711,854

Additional commitments & Date of Council vote:

2/28/2013	Committed to Chelsea renovation project	(1,200,000)
9/4/2013	Committed to Allston property renovation project	(50,000)
9/6/2014	Committed to Lynn, St. Stephen's for restoration of church and parish house	(100,000)
9/6/2014	Committed to Weymouth, Holy Nativity for support of members from Trinity	(50,000)
1/23/2015	Committed to All Saints, Whitman to support Clergy salary (Years 1-3)	(30,000)
2/26/2015	Committed to Grace, New Bedford as matching grant for capital improvements	(150,000)
2/26/2015	Committed to St. Andrew's, New Bedford for capital improvements	(50,000)
5/21/2015	Committed to Christ Church, Medway for the parish's kitchen improvement project	(35,000)

Less amount budgeted in 2014 and 2015 to be reimbursed from closed churches
May 2015 Diocesan Council allocation of Pepperell loan proceeds

Available Funds as of 6/30/2017

(77,625)
38,925
\$ 8,154

Together Now Campaign: Additional Information

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

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

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

Campaign highlights:

- 100% of the congregations of the diocese elected to participate.
- Nearly 4,000 individual gifts and pledges have been offered.
- Just more than \$20 million was raised for diocesan campaign initiatives.
- An additional \$11.8 million has been raised by 39 local collaborative campaigns, bringing the total raised across the diocese to just under \$32 million.
- In the spring-summer of 2016 three more parishes completed collaborative campaigns. The diocesan portion added additional money for the Mission Hub Initiative totaling approximately \$290,000.

The June 30, 2017, cash flow chart on page 49 reflects the collections of pledges and contributions from individuals and congregations, designated gifts as well as unrestricted gifts. An amount of \$8,987,930 has been returned to collaborative campaign parishes. Expenses fall into two categories: “Direct Campaign Expenses” which reflect money spent on the implementation of the campaign initiatives and “Other Expenses” which are costs associated with fundraising: consultations, fees and expenses. Under “Direct Campaign Expenses,” the funds designated to the Barbara C. Harris Camp and Conference Center are included in the Youth and Young Adult column. Likewise, the Cederholm Cottage falls under the Camp and Conference Center column. Now that construction is complete, the Cathedral Church of St. Paul has received its campaign payments in full. Under “Other Expenses,” the total amount spent on direct fundraising costs is slightly above 10% of the total raised for the diocesan portion, but when compared to the total raised across the diocese (approximately \$32 million), the percentage is a very favorable 8.3%.

Since the fundraising portion of the campaign began nearly five years ago, \$27,273,161, or 85%, of the total amount pledged has been received, thanks to the generosity and faithfulness of our donors. We hope that donors will continue to fulfill pledges in full so that all of the funds committed to the campaign initiatives can continue to be expended for God's mission across the diocese and beyond.

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

A chart of Together Now campaign allocations is on page 50.

Together Now Campaign
Cash Basis Revenues and Expenses
From Inception to June 30, 2017

	<u>General Restriction</u>	<u>Mission Tithe</u>	<u>Environmental Initiatives</u>	<u>Mission Hubs</u>	<u>Mission Institute</u>	<u>Y&Y Adults</u>	<u>Cathedral Renovations</u>	<u>Total</u>
Revenues								
Leadership Gifts	9,554,520	-	750	827,219	421,725	700,295	1,339,933	12,844,442
Collaborative Gifts from parishes (100% gross)	13,042,432	-	-	-	-	-	-	13,042,432
In pew collections	1,386,287	-	-	-	-	-	-	1,386,287
Contribution from the Diocese	-	250,000	-	-	-	350,000	-	600,000
Fees	-	800	630	160,744	-	-	-	162,174
Interest Income	1,684	-	30,165	-	-	-	-	31,849
Gross Revenue	23,984,923	250,800	31,545	987,963	421,725	1,050,295	1,339,933	28,067,184
Less payments to collaborating parishes to date (70%)	-8,987,930	-	-	-	-	-	-	-8,987,930
Less Admin Fee (3%) on collaborating parish payments	-215,099	-	-	-	-	-	-	-215,099
Net Revenues	14,781,894	250,800	31,545	987,963	421,725	1,050,295	1,339,933	18,864,155
Direct Expenses								
Compensation and benefits	659,783	152,156	11,000	2,579,774	258	-	-	3,402,971
Direct Campaign Expenses, non compensation	-	898,090	882,026	259,233	682,268	2,597,000	3,850,000	9,168,617
Loans	-	-	551,332	-	-	-	-	551,332
Direct Program Expenses	-	5,055	2,365	460,677	-	-	-	468,097
Total Direct Expenses	659,783	1,055,301	1,446,723	3,299,684	682,526	2,597,000	3,850,000	13,591,017
Other Expenses								
Operating and staff support	716,232	20,049	4,453	203,229	151	50	-	944,164
Technology costs	3,479	-	-	2,086	-	-	-	5,565
Facilities and other services	-	-	-	12,832	-	30,160	-	42,992
Management and professional services	1,942,779	57	3,780	900	-	-	-	1,947,516
Total Other Expenses	2,662,490	20,106	8,233	219,047	151	30,210	-	2,940,237
Total Expense	3,322,273	1,075,407	1,454,956	3,518,731	682,677	2,627,210	3,850,000	16,531,254
Net Cash Inflow from inception	11,459,621	-824,607	-1,423,411	-2,530,768	-260,952	-1,576,915	-2,510,067	2,332,901

CAMPAIGN BUDGET	MISSION HUBS	ST STEPHENS SOUTH END and LIFE TOGETHER	GREEN GRANTS AND LOANS	CATHEDRAL	CAMP	MISSION INSTITUTE	MISSION TITHE	NET CAMPAIGN EXPENSES	RESERVES	TOTAL
INITIAL ALLOCATION	6,500,000	-	2,000,000	4,000,000	2,000,000	1,000,000	2,000,000	2,500,000	-	20,000,000
previously presented reallocation (1)	250,000	-	(100,000)	(150,000)	-	-	-	-	-	-
separate St Stephens SE (2)	(500,000)	500,000	-	-	-	-	-	-	-	-
additional admin/consultants	(800,000)	-	-	-	-	-	-	800,000	-	-
RUNNING TOTAL (A)	5,450,000	500,000	1,900,000	3,850,000	2,000,000	1,000,000	2,000,000	3,300,000	-	20,000,000
ECM pledge for Life Together (3)	-	(350,000)	-	-	-	-	-	-	-	(350,000)
pledge for Bp Masereka Fdn (US) (4)	-	-	-	-	-	-	(250,000)	-	-	(250,000)
Diocesan matching grant (5)	-	350,000	-	-	-	-	250,000	-	-	600,000
transfer (6)	240,000	-	-	-	-	(240,000)	-	-	-	-
transfer (7)	(167,000)	-	-	-	-	167,000	-	-	-	-
RUNNING TOTAL (B)	5,523,000	500,000	1,900,000	3,850,000	2,000,000	927,000	2,000,000	3,300,000	-	20,000,000
primary adjustment for reserves (8)	(290,000)	-	(140,000)	-	-	(60,000)	(145,000)	-	635,000	-
secondary adjustment for reserves (8)	-	-	-	(170,000)	(145,000)	-	-	-	315,000	-
CURRENT ALLOCATION	5,233,000	500,000	1,760,000	3,680,000	1,855,000	867,000	1,855,000	3,300,000	950,000	20,000,000

NOTES, ASSUMPTIONS, AND ACTIONS

- (1) Earlier re-allocation decision
- (2) Grant directed to programs at St Stephen's South End is separated from Mission Hubs budget
- (3) The ECM pledge for Life Together supports activities budgeted through the supplemental budget
- (4) The campaign accepted an anonymous pledge to support the Bishop Masereka Foundation (US) directly
- (5) The Diocesan Council approved a new unrestricted \$600,000 grant to match the ECM/Life-Together and Bp Masereka Foundation (US) pledges
- (6) Transfers \$240,000 from the Mission Institute target funding to the Mission Hubs
- (7) Transfers \$167,000 from the Mission Hub target funding to the Mission Institute, approved by Diocesan Council in September 2017.
- (8) Establishes a reserve of \$950,000 against delinquent and incomplete pledges. The Cathedral and Camp will not be charged unless more than \$635,000 is needed.

Detailed Income from Investments: Endowment Funds

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

Agency Endowment Funds (see table on page 56)

Agency Endowment Funds are funds owned outright by the diocese. The treasurer and Diocesan Council are ultimately responsible for the investment and use of these funds. Diocesan Council relies on its Financial Advisory Committee to monitor these funds, and the Council has in place a written Investment Policy Statement (see www.diomass.org/inside/docs/investment-policy-statement). In the audited financial statements of the diocese, the Agency Funds are included as "Investments" within the listing of Assets of the Diocese. As of Dec. 31, 2016, the reported value of Investments was \$35,735,736.

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

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

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

Description of Agency Funds

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

Unrestricted

- The General Endowment Fund (DIT 7002X, proposed draw \$116,133)

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

Council Designation for Reserves

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

In January 2015, Diocesan Council established three new reserve accounts for property maintenance, episcopal elections and capital equipment, and it transferred \$1,050,000 from the General Endowment Fund to a Fidelity short term bond fund to support these reserves. The creation of these accounts reduces the need to draw upon the General Endowment Fund for capital needs. The Executive Committee of Diocesan Council responds to requests for funding from these accounts. Note, this fund is not listed on page 56 since it does not contribute to the Operational Budget revenue from agency endowments.

Council Designation of Closed Parish Proceeds

- The Fund for Congregational Vitality (DIT 7004I, proposed draw \$161,200)

This fund was initially established in 2011 with half of the net proceeds from nine closed congregations. Since then, Council has followed the same policy of putting a portion of proceeds from other closed congregations into this endowment fund. In addition, Council has consolidated existing endowment funds that were also created through the proceeds of closed congregations going back to the mid-1980's. A full list of all the congregations that have contributed to the Fund for Congregational Vitality is on page 44. The spending draw from this fund helps pay for the congregational grant programs, cost centers 2011 and 2012.

- Deaf Ministry Endowment (DIT 7004H, proposed draw \$26,559)

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

- Endowment Fund - Roslindale (DIT 7002Z, proposed draw \$3,992)

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

Restricted Funds

- John B. Coburn Endowment Fund (DIT 7002C, proposed draw \$55,433)

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

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

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

- DAF Bishop Nash Fund (DIT 7002M, proposed draw \$9,145)

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

- Clergy Salary Fund (DIT 7002N, proposed draw \$33,583)

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

- Campus Ministries Fund (DIT 7002U, proposed draw \$10,565)
Supporting campus ministry was a goal of the DAF, and this work continues in the Strategic Ministries area, cost centers 3111 through 3171.

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

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

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

- AIM Christian Witness in Education (DIT 7003C, proposed draw \$42,089)
This continues the effort to support campus ministries in cost centers 3111 through 3171.

- Youth on Mission (DIT 7003E, proposed draw \$7,977)
This fund supports the diocesan youth program, in cost center 3011.

- AIM William Coolidge Endowment Fund (DIT 7003F, proposed draw \$166,070)
This fund provides broad support for programs offered in the Support for Congregations and Strategic Ministries areas of the budget.

- AIM Hospital Ministry (DIT 7002J, proposed draw \$25,413)
Hospital ministry was a part of both the DAF and the AIM campaigns, and archival evidence suggests that this fund has its roots in the 1960s DAF drive. In recent years, hospital ministry has not had a high profile in the annual budget. The clergy supported through various cost centers do provide hospital ministry as a regular part of their service.

Other Various Council Designations

- Frederick C. Lawrence/Rhineland Fund (DIT 7002P, proposed draw \$11,208)
The Rt. Rev. Frederick C. Lawrence was bishop suffragan from 1956 to 1968. He also served as the chairman of the Bishop Rhineland Foundation, which provided support for Harvard-Radcliffe chaplaincy. Council established a fund in his honor upon his retirement, and for the next 12 years the draw supported the Foundation. More recently, the draw has supported college ministry work in Cambridge through the Life Together program and the MIT chaplaincy.

- African Scholarship Fund (DIT 7002E, proposed draw \$11,531)
Council created this fund in 1988 for a scholarship program for African students, currently supported through the MSASA program, cost center 1213.

- Endowment for Maintenance (DIT 7002G, proposed draw \$8,911)
Council in 1990 created this fund with the proceeds of a bequest. The written record from that time recommended that future Councils direct one-third of future bequests to this fund account, at least until it reached a balance of \$500,000. In January 2015 Council voted to establish the Reserve Endowment Fund (described above) and to formally replace the 1990 policy. The motivation to do so was to separate the ministry of maintenance from the random arrival of bequests. The spending draw from this existing endowment account will continue to support regular maintenance needs through cost centers 5111 through 5125.

- Seminarian Education Endowment Fund (DIT 7004E, proposed draw \$55,907)
Created to support seminarian education through the scholarship program in cost center 1312.

Council Designation of Proceeds from Other Properties

- Eliza Gray Case TRS P E C (DIT 7002T, proposed draw \$136,477)

Council received these funds when the Eliza Gray Case home was sold. The legal review of the sale determined that the funds can be used for the Sherrill House in Boston, for general purposes of the diocese or for purposes in southeast Massachusetts. The current application is to support the Bristol County Case Grants program, cost center 2013.

- House of Mercy Fund (DIT 7002Y, proposed draw \$32,017)

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

Designation of Gifts and Bequests for Diocesan Operations

These funds provide general support for diocesan operations through the Operational Budget:

- Adelaide R. Harris Fund (DIT 7002S, proposed draw \$224)
- R. W. Chisolm Fund (DIT 7003R, proposed draw \$4,123)

Designation of Gifts and Bequests for Diocesan Programs

- Thomas M. Coffin Fund (DIT 8000V, proposed draw \$5,760)

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

- A. E. Emery Camp Dennen Fund (DIT 7002O, proposed draw \$1,975)

Established by a bequest in 1976, currently used to provide a grant to the Barbara C. Harris Camp and Conference Center, cost center 3921.

- Harriet G. Averill Fund (DIT 7002L, proposed draw \$1,765)

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

- Caroline C. Haskett Fund (draw 7002R, proposed draw \$89)

A small fund established in 1978, identified for support of Church Home Society and orphan children. Given the size of the draw, it is implicitly used for basic infrastructure support for the Church Home Society operations.

- Jessie B. Cox Fund (DIT 7003A, proposed draw \$34,802)

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

- William V. Tripp Jr. Memorial Fund (DIT 7003B, proposed draw \$44,575)

Established in 1987 to support the position of diocesan youth minister, cost center 3011.

- C.L.T. Lee / B. Wong Fund (DIT 7002D, proposed draw \$5,071)

Established in 1988 to support ministry among Asian Americans, cost center 3311.

Designation of Gifts and Bequests for Parishes

- Abby Jackson Fund (DIT 8000W, proposed draw \$3,243)

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

- Amelia Grant Schwarz Fund (DIT 7002W, proposed draw \$21,768)

Established in 1947 to provide an annual grant for the housing costs of the rector of St. John’s, Sharon, included in cost center 2014.

Designation of Gifts and Bequests for the Bishop

- Maurine C. Coburn Trust (DIT 7003D, proposed draw \$7,525)

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

- Bishop's Entertainment Fund (DIT 8000X, proposed draw \$6,958, plus 16,000 shares Proctor & Gamble, projected \$42,400 in dividend income)

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

- Frederick A. Reeve Fund (DIT 8000T, proposed draw \$9,716)

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

AGENCY ENDOWMENTS		Market Value of	
		Fund -	4% Draw
		6/30/2017	
D7002X	GENERAL ENDOWMENT FUND	3,183,534	116,133
D7002C	JOHN B COBURN ENDOWMENT FUND	1,453,810	55,433
D7002D	C.L.T. LEE / B. WONG FUND	132,933	5,071
D7002E	AFRICAN SCHOLARSHIP FUND	302,427	11,531
D7002G	ENDOWMENT FOR MAINTENANCE	233,723	8,911
D7002J	AIM / HOSPITAL MINISTRY	664,080	25,413
D7002L	HARRIET G AVERILL FUND	46,293	1,765
D7002M	D A F BISHOP NASH FUND	239,843	9,145
D7002N	CLERGY SALARY FUND	880,772	33,583
D7002O	A E EMERY CAMP DENNEN FUND	51,804	1,975
D7002P	FREDRICK C LAWRENCE/RHINELANDER FUND	293,946	11,208
D7002R	CAROLINE C HASKETT FUND	2,342	89
D7002S	ADELAIDE R HARRIS FUND	5,872	224
D7002T	THE ELIZA GRAY CASE TRS P E C	3,578,804	136,477
D7002U	CAMPUS MINISTRIES FUND	277,080	10,565
D7002W	AMELIA GRANT SCHWARZ FUND	554,956	21,768
D7002Y	HOUSE OF MERCY FUND	839,699	32,017
D7002Z	ENDOWMENT FUND - ROSLINDALE	104,572	3,992
D7003A	THE JESSIE B COX FUND	912,728	34,802
D7003B	WILLIAM V. TRIPP JR. MEMORIAL FUND	1,169,033	44,575
D7003C	AIM CHRISTIAN WITNESS IN EDUC	1,103,850	42,089
D7003D	MAURINE C COBURN TRUST	197,343	7,525
D7003E	YOUTH ON MISSION	209,213	7,977
D7003F	AIM WILLIAM COOLIDGE ENDOWMENT FD	4,355,422	166,070
D7003R	W. CHISOLM FUND	108,129	4,123
D7004E	SEMINARIAN EDUCATIONAL ENDOWMENT	1,466,152	55,907
D7004H	DEAF MINISTRY ENDOWMENT	718,152	26,559
D7004I	FUND FOR CONGREGATIONAL VITALITY	4,635,941	161,200
D8000T	FREDERICK A REEVE FUND	254,790	9,716
D8000V	THOMAS M COFFIN FUND	151,033	5,760
D8000W	A. JACKSON FUND	85,018	3,243
D8000X	BISHOPS ENTERTAINMENT	182,462	6,958
TOTAL		28,395,756	1,061,804

Trust Endowment Funds at the Direction of Trustees of Donations

(see table on page 58)

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

Those trusts for which the diocese's claim as a beneficiary is absolute and not subject to the discretion of the trustees appear in the financial statements as "Beneficial interest in perpetual trusts" within the listing of Assets of the Diocese. As of Dec. 31, 2016, the reported value of Beneficial interest in perpetual trusts was \$32,487,338.

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

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

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

Bishop's Directed Funds (see table on page 59)

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

Allocation of BDF funding among the programs of the diocese is reported as "BDF Grants." The 2018 budget includes \$685,000 of BDF grants and associated expenditures. (See summary budget table on page 15, and for more detail, see the tables on pages 12-13).

At the same time, the BDF's are also there to support true discretionary spending by the bishop, some of which is appropriately not run through the budget. This is a judgment call appropriately left to the diocesan bishop, and is a small part of the total BDF spending. For 2018, the BDF grants in the budget represent almost 92% of the available BDF income for the year.

TRUST ENDOWMENTS		Market Value of	
		Fund -	4% Draw
		6/30/2017	
D1140I	NORDEN MEMORIAL FUND	44,526	1,720
D2110A	SARAH A MCALLISTER FUND	3,826	147
D2110B	G & S TURNER MEMORIAL FUND	16,036	618
D2130A	SARAH T WEAVER FUND II	175,067	6,517
D4065A	ST MATTHEWS ENDOWMENT FD	175,404	6,756
D4065B	SAMUEL & EMMA DOWNING FD	9,244	356
D4065C	JOSEPH C STOREY FUND	101,791	3,921
D4065D	MARY A WILSON FUND	53,606	2,065
D4065E	A SMITH FUND FOR RECTORY MAINTENANCE	77,644	2,991
D4065G	MARTHA TERRY FUND	325	13
D5015A	AE GOVE MEMORIAL FUND	29,968	1,143
D5015C	FRANK H. BURNETT FUND	62,795	2,319
D7000A	DIOCESAN ENDOWMENT FUND	5,366,326	206,706
D7000B	VOTE OF CORP DIOCESAN FUND - VOC	2,132,274	82,132
D7000D	FAY DONATION I	278,418	10,724
D7000G	BENJAMIN LEEDS FUND - VOC	5,719,638	195,562
D7000I	CHURCHES AND CHAPELS FUND - VOC	104,766	3,996
D7001E	APPLETON FUND	57,781	2,226
D7001F	BISHOP'S FUND	1,355,649	52,218
D7001G	BISHOP OF MA SALARY FUND	170,689	6,575
D7001H	BISHOPS HOUSE FUND	280,185	10,792
D7001I	SUFFRAGAN BISHOPS FUND	1,097,118	42,259
D7001J	CAMILLA DAVENPORT FUND	42,974	1,655
D7001K	CORNELIA A FRENCH FUND	960,692	37,004
D7001L	KATHERINE FRENCH FUND	199,670	7,691
D7001O	ETHEL A CLARK FUND	1,315,980	50,690
D7001Q	MARY K D BABCOCK FD I	305,696	11,775
D7001R	MARY K D BABCOCK FD II	38,152	1,470
D7001S	JULIA K DAVEY FUND	95,005	3,659
D7001T	WILLIAM C WINSLOW FUND - VOC	13,920	533
D7001W	WK OF MERCY HARVISON FUND	51,407	1,980
D7001X	AMY YEAMES FUND	61,678	2,376
D7001Y	EDITH MUNRO FUND	26,937	1,038
D7002Q	AC BULLARD FD STUDENTS	259,210	9,984
D7003X	PATTON MEMORIAL FUND	1,401,597	53,983
D7004B	PATTON FUND FOR MAINTENANCE	115,593	4,452
D7004C	KATHERINE M. FOSTER TRUST	243,949	9,396
D7004D	FRANK H. BURNETT FUND	50,502	1,945
D9000Z	ABBY BROWN TRUST - VOC	202,408	7,796
D9001B	EDMUND F SLAFTER FUND II	253,500	9,764
TOTAL		22,951,945	858,947

		Market Value of Fund -	
UNRESTRICTED BDF ENDOWMENTS		6/30/2017	4% Draw
D8000B	BISHOPS UNREST. DISCRETIONARY FUND	3,907,337	150,505
D8000D	MARIA A APPLETON DODGE FUND	1,719,370	66,228
D8000G	MARGARET KIMBALL FUND	68,775	2,649
D8000J	THOMAS NELSON MEMORIAL FUND	23,850	919
D8000K	S & F ROWE FUND	23,954	923
D8000L	VALENTINE SLATERY FUND	21,488	828
D8000P	AMELIA WORTHINGTON FUND II	654,977	25,229
D8000U	H.S. HOWE FUND	1,451,627	55,915
D9000M	SARAH H A BURNHAM FUND	1,804,269	69,498
D9000N	THERESA COOLIDGE FUND	121,894	4,695
D9000Q	ELIZA S HATFIELD FUND - VOC	1,336,415	51,477
D9000S	FRANCIS S PARKER FUND	733,978	28,272
D9000U	AGNES WINSLOW RILEY FUND	371,781	14,320
D9000V	SARAH L SLATTERY FUND	131,111	5,050
D9000X	FRANCES L WHITTEMORE FUND	154,263	5,942
D9000Y	ROBERT E TOWNSEND TRUST - VOC	90,775	3,497
		12,615,866	485,947
RESTRICTED BDF ENDOWMENTS			
D7001C	PERCIVAL L & JULIA A POWELL	356,927	13,748
D8000A	MONKS/STEVENS/PITTMAN	748,171	28,818
D8000C	ANNIE O BALDWIN FUND II	16,371	631
D8000E	PAULINE CONY DROWN FUND	60,260	2,321
D8000F	HILL FUND	313,186	12,063
D8000H	LAURA R LITTLE MEMORIAL FUND	59,564	2,297
D8000I	EDWARD F MCINTIRE FUND	17,786	685
D8000M	PATIENCE H SLOANE FUND	236,473	9,109
D8000N	GEORGE AUGUSTUS STRONG MEM FUND	38,042	1,469
D8000O	AMELIA WORTHINGTON FUND I	453,511	17,469
D8000Q	SHERBONDY FUND	4,564	176
D8000R	THE DILL FUND	87,717	3,379
D8000S	ANNA MUIRSON JOHNSON BELLAMY FD	28,146	1,029
D9000L	EAST CAMBRIDGE FUND - ASCENSION	90,375	3,482
D9000O	FAY DONATION II	278,418	10,724
D9000P	WILLIAM A GATCHELL FUND	883,805	34,043
D9000T	SWANSEA RESTHOUSE FUND	2,974,569	114,576
D9000W	C HARRISON SOWDON FUND - VOC	101,374	3,905
		6,749,257	259,924
TOTAL		19,365,123	745,871

Grants to Congregations in 2016

Congregational Development Open Grants			\$150,000
Congregation	City	Program	Grant Amount
St. John's	Arlington	St. John's Program for Renewal and Partnership	8,000
Common Cathedral	Boston	Common Art	10,000
The Crossing	Boston	Creative Liturgy Development	9,050
Emmanuel	Boston	BostonWarm	10,000
St. Stephen's	Boston	BLOCS	10,000
St. Peter's on the Canal	Buzzards Bay	New Stove	5,845
St. Mary's	Dorchester	Podcast + Jazz Mass + Latino/Hispanic Ministry	5,200
Church of the Holy Spirit	Fall River	Congregation Recruitment and Evangelism	2,200
St. Luke's	Fall River	Educate the Children	2,080
Trinity	Haverhill	Hearing assistive/translation devices + filing cabinet	6,250
St. Stephen's	Lynn	Outdoor banners + church sign	10,000
Church of the Holy Spirit	Mattapan	Congregational and Family Development	6,680
St. Thomas'	Taunton	Children's Mass	10,000
St. Peter's	Weston	Direct Mail program	8,381
			\$103,686
Congregational Development Targeted Grants			\$60,000
Congregation	City	Program	Grant Amount
St. Paul's	Newburyport	Lead Collaborator salary	10,500
Grace Church	Everett	Haitian Ministry	2,500
St. John's	Holbrook	St. John's Afterschool Program	10,000
St. John's	Sandwich	Stewardship Matching Grant	8,780
St. David's	South Yarmouth	Stewardship Matching Grant	10,000
			\$41,780
House of Mercy Deanery Grants			\$32,796
Congregation	City	Program	Grant Amount
Alewife Deanery			
St. Paul's	Bedford	Haiti Nutrition	850
St. Peter's	Cambridge	Afterworks	850
Christ Church	Waltham	Diaper Depot	840
Boston Harbor Deanery			
Emmanuel	Boston	BostonWarm	1,900
St. Stephen's	Boston	St. Stephen's Youth Programs	428
St. Mary's	Dorchester	Madres Pa'lantes	640
Cape & Islands Deanery			
St. Mary's Church	Barnstable	Amazing Grace of Cape Cod	2,540
St. Mary's Church	Barnstable	Addendum Grant	428
Charles River Deanery			
All Saints' Church	Brookline	Addendum Grant	238
Concord River Deanery			
St. Michael's	Holliston	Le Chef Program	1,000
St. Paul's	Natick	Menstrual management kits for Queen Esther School	1,540
Merrimack Valley Deanery			
St. John's	Lowell	KALEIDOSCOPE	1,640
St. Paul's	Newburyport	Food Voucher Program	900
Mt. Hope/Buzzards Bay Deanery			
Grace Church	New Bedford	Laundry Love	428
St. Andrew's	New Bedford	Sunday School teacher stipend	2,540
Neponset River Deanery			
Church of the Advent	Medfield	Cabinets for Medway House Family Shelter	765
Christ Church	Medway	Supplies for shelter and food pantries	888
St. Michael's	Milton	Safe Passage	888
North Shore Deanery			
All Saints of the North Shore	Danvers	Be the Light Ministry	750
All Saints of the North Shore	Danvers	Addendum Grant	214
St. Stephen's	Lynn	Strengthening Women and Families	1,790
St. Stephen's	Lynn	Addendum Grant	214

South Shore Deanery			
Emmanuel	Braintree	KidzCloset	635
Trinity	Marshfield	Carolina Hill	635
All Saints'	Whitman	Rehoboth Shelter	635
All Saints'	Whitman	Wellspring	635
Taunton River Deanery			
All Saints'	Attleboro	One Family, A Mission of Unity	1,270
All Saints'	Attleboro	Addendum Grant	214
St. Thomas	Taunton	Common Ground scholarships	1,270
St. Thomas	Taunton	Addendum Grant	214
			<u>27,780</u>

Sending Serving Deanery Grants \$48,000

Congregation	City	Program	Grant Amount
Alewife Deanery			
St. Paul's	Bedford	Appalachia Service Project	755
St. Mark's	Burlington	Pumpkin Patch Ministry	385
St. James's	Cambridge	Helping Hand Food Pantry	1,805
St. James's	Somerville	ESL Education Program	350
Christ Church	Waltham	Diaper Depot	750
Boston Harbor Deanery			
Church of the Advent	Boston	Tuesday Community Supper	1,000
St. Stephen's	Boston	St. Stephen's Youth Programs	3,000
St. Stephen's	Boston	Addendum Grant	1,129
Charles River Deanery			
St. Paul's	Brookline	Embodied Prayer: Yoga	356
Concord River Deanery			
St. Luke's	Hudson	St. Luke's Community Suppers	120
St. Paul's	Natick	Menstrual Management kits for Queen Esther School	1,880
St. Mark's	Southborough	Summer Youth Mission with Youth Works	2,000
Merrimack Valley Deanery			
Trinity	Haverhill	Dinah's House	2,000
Trinity	Haverhill	Addendum Grant	350
Grace Church	Lawrence	Radio program	2,000
Grace Church	Lawrence	Addendum Grant	350
Mt. Hope/Buzzards Bay Deanery			
St. Andrew's Church	New Bedford	Ecuadorian pilgrimage	4,000
St. Andrew's Church	New Bedford	Addendum Grant	1,129
Neponset River Deanery			
St. Michael's Church	Milton	Good Friday Interfaith End Hunger Program	1,000
Emmanuel	West Roxbury	backpacks for Youth on Fire + Community Day Center	1,000
St. John's	Westwood	Honduras Service-Learning Trip	1,500
North Shore Deanery			
St. Peter's	Beverly	Outreach Suppers	1,000
St. Peter's	Beverly	Addendum Grant	565
St. Stephen's	Lynn	Summer Learning Program	2,000
St. Stephen's	Lynn	Addendum Grant	565
Christ Church of Hamilton & Wenham	South Hamilton	Good Company	1,000
South Shore Deanery			
St. John's Church	Holbrook	Family Partnerships of the Southeast Medically Complex Program	2,000
Christ Church	Quincy	Father Bill's/Mainspring	2,000
Taunton River Deanery			
Trinity Church	Bridgewater	J2A Pilgrimage	4,000
Trinity Church	Bridgewater	Addendum Grant	1,129
			<u>41,118</u>

Case Trust and Bristol County Fund **\$131,957**

Congregation	City	Program	Grant Amount
St. Peter's	South Dartmouth	Christmas party for homeless in motels	3,000
St. Peter's	South Dartmouth	Healing Liturgy	1,000
St. Peter's	South Dartmouth	Labyrinth	5,500
Good Shepherd	Fairhaven	Book Café tech update	5,000
Good Shepherd	Fairhaven	Spirit of Grace	4,000
Holy Spirit	Fall River	South Coast Mission Hub: Grass Roots Initiatives	6,800
Holy Spirit	Fall River	South Coast Mission Hub: Life Together	6,600
Holy Spirit	Fall River	South Coast Mission Hub: Project Discovery	6,600
Holy Spirit	Fall River	Senior Fellowship	8,000
Holy Spirit	Fall River	Bayside Fellowship (homeless ministry)	5,200
Holy Spirit	Fall River	Family Fun Day	3,200
Holy Spirit	Fall River	Partnership Dinner	1,500
St. Luke's	Fall River	Urban Youth Education/Empowerment Program	10,000
St. Andrew's	New Bedford	Bright and Happy Days	15,192
St. Martin's	New Bedford	Breakfast with Santa	3,000
St. Martin's	New Bedford	Senior Lunch Program	3,000
Grace	North Attleborough	E Cubed Academy	10,000
Church of Our Saviour	Somerset	Food Pantry turkeys	4,600
Church of Our Saviour	Somerset	Family Fun Day for homeless overflow shelter	1,000
Church of Our Saviour	Somerset	Parish Retreat	2,000
Christ Church	Swansea	Zacchaeus Project	7,400
St. Thomas'	Taunton	The Bridge	1,000
St. Thomas'	Taunton	Common Ground: A Center for Spiritual Practice	4,000
			117,592

Creation Care Initiative: Simple Acts of Stewardship Grants

Congregation	City	Program	Grant Amount
St. Mary's	Dorchester	Barnraising	600
Good Shepherd	Watertown	Vacation Garden School	500
			1,100

Creation Care Initiative: Green Improvement Grants

Congregation	City	Program	Grant Amount
All Saints' Church	Brookline	Rectory thermostats	900
Trinity Church	Marshfield	Church ceiling fans and insulation	3,000
Parish of St. Paul	Newton Highlands	Water heating system replacement	5,645
St. Peter's	Weston	Parish hall window replacement	5,000
St. Mary's	Barnstable	Mini-split heat pumps	9,000
All Saints North Shore	Danvers	Windows + water conservation + LED conversion	9,000
Ascension	Ipswich	HVAC replacement + lighting + gym roof insulation + new thermostats	5,000
St. John's	Jamaica Plain	Finish heating duct insulation	5,000
Grace	Lawrence	Lighting + heating + water efficiency	9,930
St. Anne's-in-the-Fields	Lincoln	Solar + lighting + AC + water conservation	8,000
Christ Church	Medway	Heating system replacement	9,000
Church of Our Saviour	Milton	Interior storm windows	5,000
St. Paul's	Newburyport	New heating system for St. Anna's Chapel	6,000
Grace	Newton	Rectory heating system	5,000
St. Anne's	North Billerica	Furnace replacement	9,000
Good Shepherd	Reading	Toilet replacement + LEDs + thermostats	5,000
Trinity	Rockland	Heating system renovation + link building envelope	9,000
Trinity	Stoughton	Boiler replacement	5,000
Christ Church	Swansea	Furnace replacement + zone creation	5,000
Good Shepherd	Waban	Boiler/hot water heater replacement	5,000
Good Shepherd	Watertown	Restroom upgrade	5,000
St. Mark's	Westford	Lights and National Grid projects	3,400
St. John's	Westwood	East Tower windows + insulation	5,000
			136,875

Hispanic Ministries Grants

			25,000
			Grant Amount
St. Luke's/San Lucas Church	Chelsea		5,000
Grace Church	Lawrence		5,000
St. Anne's Church	Lowell		5,000
St. Peter's/San Pedro Church	Salem		5,000
			20,000

African Ministries Grants

			25,000
Grace Chapel	Brockton		5,000
Christ Church	Hyde Park		5,000
St. Stephen's	Lynn		5,000
Christ Church	Waltham		5,000
			20,000

Mission Tithe Matching Grants

Congregation	City	Program Location	Grant Amount
St. John's Church	Beverly Farms	Syria	10,000
Grace Church	Everett	Arizona/Mexico	10,000
St. John's Church	Gloucester	Navajoland	8,500
Christ Church	South Hamilton	South Sudan	5,000
St. Paul's Church	Bedford	Haiti	10,000
Trinity Church	Concord	Maranyundo Initiative - Rwanda Girls School	12,500
St. Elizabeth's Church	Sudbury	Appalachia, VA	10,000
St. Dunstan's Church	Dover	Haiti	10,000
St. Andrew's Church	Framingham	Appalachia, VA	3,575
Christ Church	Needham	Haiti	7,000
Parish of St. John Evangelist	Hingham	South Africa	10,000
Trinity Church	Marshfield Hills	South Africa	10,000
St. Christopher's Church	Chatham	Liberia	5,000
Trinity Church	Melrose	Tanzania	10,000
			121,575

Continuing Education Grants

Congregation	City	Program	Grant Amount
St. Peter's Church	Cambridge	Continuing Ed - Living Stones	6,990
			6,990

Sabbatical Funds

Congregation	City	Grant Amount
Church of the Advent	Boston	6,000
St. Stephen's Church	Cohasset	6,000
St. Paul's Church	Bedford	6,000
St. Andrew's Church	Ayer	6,000
		24,000

Bishops' Funds

Clergy Children College Scholarships	23 students	47,000
Society for the Relief of Aged or Disabled Clergy	Served 39 clergy	120,571
Society for the Relief of Widows, Widowers and Orphans of Clergy	Served 35 widows	72,624
TOTAL GRANTS \$		902,691

Green Loans	7 Loans	Current	500,057
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Stokes Fund Loans

73 Stokes Fund Loans	5 Loans	2-8 months in arrears	
	5 Loans	9+ months in arrears	
	63 Loans	Current	2,040,878

The Protestant Episcopal Diocese of Massachusetts

Financial Report
December 31, 2016 and 2015

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RSM US LLP

Independent Auditor's Report

The Protestant Episcopal Diocese of Massachusetts
Boston, Massachusetts

Report on the Financial Statements

We have audited the accompanying financial statements of The Protestant Episcopal Diocese of Massachusetts which comprise the statements of financial position as of December 31, 2016 and 2015, 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, 2016 and 2015, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

RSM US LLP

Boston, Massachusetts
June 26, 2017

The Protestant Episcopal Diocese of Massachusetts

**Statements of Financial Position
December 31, 2016 and 2015**

	2016	2015
Assets		
Cash and cash equivalents	\$ 2,545,569	\$ 2,487,863
Assessments receivable, less allowance for uncollectible assessments of \$200,000 and \$250,000 as of December 31, 2016 and 2015, respectively	248,210	552,754
Dividends and interest receivable	434,784	586,832
Prepaid expenses and other current assets	66,181	47,537
Due from affiliated entities	-	319,052
Pledges receivable, restricted, net	3,647,079	5,466,259
Mortgages and notes receivable, affiliated entities, net of allowance	2,987,823	3,386,268
Restricted cash	4,763,241	2,459,301
Investments	35,735,736	33,975,784
Beneficial interest in perpetual trusts	32,487,338	31,549,969
Interests in charitable remainder trusts	563,472	538,228
Pooled income fund	6,356	7,857
Property, buildings and equipment, net	5,026,542	5,125,874
Total assets	\$ 88,512,331	\$ 86,503,578
Liabilities and Net Assets		
Liabilities:		
Accounts payable and accrued expenses	\$ 708,125	\$ 573,827
Due to affiliated entities	120,627	-
Due to parishes and other entities from capital campaign, net	1,776,261	2,638,575
Funds held for other beneficiaries and affiliated entities	4,847,335	4,755,598
Total liabilities	7,452,348	7,968,000
Net assets:		
Unrestricted:		
Designated by Diocesan Council - quasi endowment	12,643,805	9,873,618
Designated by Diocesan Council - specified purposes	96,787	280,672
Undesignated surplus	6,300,414	6,688,378
	19,041,006	16,842,668
Temporarily restricted	17,623,473	18,386,711
Permanently restricted	44,395,504	43,306,199
Total net assets	81,059,983	78,535,578
	\$ 88,512,331	\$ 86,503,578

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts

Statements of Activities
Years Ended December 31, 2016 and 2015

	2016				2015			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Operating:								
Revenues, support and other income:								
Support from congregations	\$ 1,297,589	\$ 529,708	\$ -	\$ 1,827,297	\$ 1,841,850	\$ -	\$ -	\$ 4,935,397
Gifts, grants and fees						686,627		2,528,477
Investment income:								
Distributed under Diocesan spending policy	338,812	660,383	-	999,195	259,376	614,663	-	874,039
Distributed from Diocesan Investment Trust funds	1,086,987	473,057	-	1,560,044	1,043,199	385,505	-	1,428,704
Other	89,925	-	-	89,925	93,245	-	-	93,245
Designated funds made available by Diocesan Council	183,885	-	-	183,885	155,001	-	-	155,001
In-kind rent	360,000	-	-	360,000	360,000	-	-	360,000
Net assets released from restrictions	3,873,119	(3,873,119)	-	-	3,638,673	(3,638,673)	-	-
Total revenues, support and other income	12,256,567	(2,209,971)	-	10,046,596	12,326,741	(1,951,878)	-	10,374,863
Expenses:								
Support to Episcopal Church	938,292	-	-	938,292	966,300	-	-	966,300
Deaneries, congregations and clergy	1,061,194	-	-	1,061,194	1,039,602	-	-	1,039,602
Congregational resources and training	1,223,729	-	-	1,223,729	1,079,395	-	-	1,079,395
Strategic ministries	4,437,216	-	-	4,437,216	4,172,734	-	-	4,172,734
Episcopal and diocesan support	1,471,991	-	-	1,471,991	1,414,498	-	-	1,414,498
Administrative services	1,477,318	-	-	1,477,318	1,512,352	-	-	1,512,352
Bishop's discretionary expenses	768,446	-	-	768,446	626,376	-	-	626,376
In-kind rent	360,000	-	-	360,000	360,000	-	-	360,000
Bad debt (recovery) expense	(31,318)	-	-	(31,318)	196,746	-	-	196,746
Depreciation	258,538	-	-	258,538	209,517	-	-	209,517
Total expenses	11,965,406	-	-	11,965,406	11,577,520	-	-	11,577,520
Increase (decrease) in net assets from operations	291,161	(2,209,971)	-	(1,918,810)	749,221	(1,951,878)	-	(1,202,657)
Non operating:								
Other income, gains (expenses) and (losses):								
Revolving loan fund interest, net of expenses	-	-	53,473	53,473	-	-	48,610	48,610
Investment income (losses) on endowment investments, net of spending policy	306,162	516,536	74,720	897,418	(304,110)	(733,478)	(186,860)	(1,224,468)
Designated funds made available by Diocesan Council	(183,885)	-	-	(183,885)	(155,001)	-	-	(155,001)
Contributions - capital campaign	-	930,197	-	930,197	-	1,095,197	-	1,095,197
Capital campaign expenses	(211,882)	-	-	(211,882)	(101,166)	-	-	(101,166)
Gain on disposal of property, buildings and equipment	-	-	-	-	7,187	-	-	7,187
Gain from sale of property from closed parishes	1,965,280	-	-	1,965,280	135,661	-	-	135,661
Change in value of beneficial interest in trusts	-	-	961,112	961,112	-	-	(1,612,573)	(1,612,573)
Other investment gains (losses)	57,635	-	-	57,635	(5,474)	-	-	(5,474)
Other expense, net	(26,133)	-	-	(26,133)	(320,975)	-	-	(320,975)
Total other income, gains, (expenses) and (losses)	1,907,177	1,446,733	1,089,305	4,443,215	(743,878)	361,719	(1,750,843)	(2,133,002)
Change in net assets	2,196,338	(763,238)	1,089,305	2,524,405	5,343	(1,590,159)	(1,750,843)	(3,335,659)
Net assets at beginning of year	16,842,668	18,386,711	43,306,139	78,535,518	16,837,325	19,976,870	45,057,042	81,871,237
Net assets at end of year	\$ 19,041,006	\$ 17,623,473	\$ 44,395,504	\$ 81,059,983	\$ 16,842,668	\$ 18,386,711	\$ 43,306,199	\$ 78,535,578

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts

Statements of Cash Flows

Years Ended December 31, 2016 and 2015

	2016	2015
Cash flows from operating activities:		
Change in net assets	\$ 2,524,405	\$ (3,335,659)
Adjustments to reconcile change in net assets to net cash provided by (used in) operating activities:		
Depreciation	258,538	209,517
Recovery of doubtful pledges receivable	(204,051)	(303,053)
Gain on sale of property from closed parishes	(1,965,280)	(135,661)
Realized and unrealized investment (gains) losses	(1,558,205)	676,509
Change in split-interest agreements	(961,112)	1,612,573
Loss on disposal of property, buildings and equipment	-	(7,187)
Donated securities	(235,709)	(418,701)
Proceeds from sale of donated securities	235,709	418,701
Net (recovery) provision for mortgage notes receivable allowance	(18,102)	90,000
Changes in operating assets and liabilities:		
Assessments receivable	304,544	52,684
Dividends and interest receivable	152,048	(236,737)
Pledges receivable	2,023,231	3,015,371
Due to/from affiliated entities	402,551	104,390
Prepaid expenses and other current assets	(18,644)	(5,885)
Accounts payable and accrued expenses	134,298	(122,349)
Due to parishes and other entities from capital campaign	(862,314)	(2,141,208)
Change in funds held for other beneficiaries and affiliated entities	91,737	(651,680)
Net cash provided by (used in) operating activities	303,644	(1,178,375)
Cash flows from investing activities:		
Net (increase) decrease in restricted cash	(2,303,940)	274,123
Additions to property, buildings and equipment	(159,206)	(1,436,560)
Mortgage loans granted, net of repayments	(18,205)	(192,557)
Loans issued from Stokes Fund	(99,636)	(394,959)
Payments received on Stokes Fund loans	534,388	398,888
Proceeds from sale of property, buildings and equipment	-	170,000
Proceeds from sale of property from closed parishes	2,002,408	-
Purchases of investments	(720,184)	(1,967,170)
Sales of investments	518,437	3,270,914
Net cash (used in) provided by investing activities	(245,938)	122,679
Net increase (decrease) in cash and cash equivalents	57,706	(1,055,696)
Cash and cash equivalents, beginning of year	2,487,863	3,543,559
Cash and cash equivalents, end of year	\$ 2,545,569	\$ 2,487,863

See notes to financial statements.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies

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

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

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

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

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

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

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

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

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

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

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

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

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

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

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

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

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

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

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

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

Restricted cash: Restricted cash at December 31, 2016 and 2015 includes approximately \$4.6 million and \$2.5 million, respectively, designated by the Diocesan Council related to proceeds from closed parishes for future consideration, capital campaign contributions received and not spent, and distributions owed to beneficiaries.

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

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

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

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

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

Property, buildings and equipment: Property, buildings, building improvements and equipment are carried at historical cost less accumulated depreciation. Depreciation on buildings, building improvements and equipment is charged as a non-operating expense. Depreciation is computed using the straight-line method over the estimated useful lives of buildings, generally 40 to 50 years, building improvements, 20 years, and equipment, 3 to 5 years. Betterments, renewals and extraordinary repairs that extend the life of the asset are capitalized; other repairs and maintenance are expensed.

Asset retirement obligation: The Diocese follows FASB ASC 410, "Asset Retirement and Environmental Obligations"; this standard requires a liability be recorded at fair value specific to certain legal environmental obligations. The recording of a liability is required if such conditions exist and the obligation can be reasonably estimated. As of December 31, 2016 and 2015, the Diocese is unaware of any such obligations. The Diocese will recognize a liability in the period in which it becomes aware of such liability and sufficient information is available to reasonably estimate the fair value.

Impairment of long-lived assets: Long-lived assets, which consist primarily of property, buildings, and equipment, are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount of the asset may not be recoverable. When such events occur, the Diocese compares the carrying amounts of the assets to the undiscounted expected future cash flows over the remaining life of the asset. If this comparison indicates that there may be impairment, the amount of impairment is calculated as the difference between the carrying value and fair value. During the fiscal years ended December 31, 2016 and 2015, no impairment indicators were identified.

Non-operating activities: Non-operating activities reflect transactions that involve long-term investment or are capital in nature. This includes revolving loan fund interest, net of expenses, investment income on endowment investments (net of spending policy), designated funds made available by Diocesan Council, capital campaign contributions and expenses, gains and losses on sale from closed parishes, gains and losses on disposal of property, buildings and equipment, change in value of beneficial interests, other investment income and losses, and other income and expenses.

Support from congregations: The Diocese receives support from parishes and missions in the form of assessment payments. Assessment payments are mandatory for parishes as part of their agreement with the Diocese.

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

Investment policy: The Diocese has adopted an investment policy for its endowment funds with an asset allocation of 50% to 70% of portfolio value in stock and equivalents with a target of 60% and 30% to 50% of portfolio value in fixed income with a target of 40%. Movements within the ranges will be based on periodic assessment of the relative valuation of the different asset classes, as well as economic outlook. The Diocesan Council can authorize exceptional moves outside the range. As of December 31, 2016 and 2015, the custodian for the majority of the Diocese's investments was the Diocesan Investment Trust (DIT). The investments were invested in the DIT's Stock Fund, Income Fund, and Fossil Fuel Free Stock Fund.

The investment performance of the "Stock Fund" is expected to rank consistently in the top half of the Independent Consultants Cooperative ("ICC") Global Equity Funds Universe, while the investment performance of the Income Fund is expected to rank consistently in the top half of the ICC Fixed Income Universe. The performance of the Fossil Fuel Free fund is expected to remain within 30 basis points (plus or minus) of that of its blended benchmark (85% Russell 3000 & 15% EAFE). The performances of other managers hired to administer particular 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 policy attempts to provide a predictable stream of funding for its funds while seeking to maintain the purchasing power of endowment assets.

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

During 2016 and 2015, the upper limit was 5.5%, the lower limit was 3.5%, and the actual draw was 4% of the average three years' fair value of the endowment. Income earned under the policy in excess of targeted earnings is available for distribution under the policy should earned income be less than the target in subsequent years. Amounts earned in excess of the target are included in temporarily restricted net assets in the statements of activities. This is consistent with the Diocese's objective to maintain the purchasing power of the endowment assets held in perpetuity as well as to provide additional real growth through investment return.

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

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

Investment in the DIT consists of investments in a stock fund, an income (bond) fund, and a fossil fuel free stock fund, which are reported at fair value using the Net Asset Value (NAV) as a practical expedient. The practical expedient allows net asset value per share to represent fair value for reporting purposes when the criteria for using this method are met.

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

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

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

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

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

Recent accounting pronouncements: In May 2014, the FASB issued Accounting Standards Update ("ASU") 2014-09, "Revenue from Contracts with Customers," 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 GAAP when it becomes effective and permits the use of either a full retrospective or retrospective with cumulative effect transition method. In August 2015, the FASB issued ASU 2015-14, "Revenue from Contracts with Customers (Topic 606) Deferral of the Effective Date" and voted to delay the effective date of the proposed standard. The updated standard will be effective for annual reporting periods beginning after December 15, 2018, and interim periods within annual reporting periods beginning after December 15, 2019. The Diocese is currently evaluating the impact of the adoption of this standard on its financial statements.

In February 2016, the FASB issued ASU 2016-02, "Leases (Topic 842)". The guidance in this ASU supersedes the leasing guidance in Topic 840, "Leases". Under the new guidance, lessees are required to recognize lease assets and lease liabilities on the balance sheet for all leases with terms longer than 12 months. Leases will be classified as either finance or operating, with classification affecting the pattern of expense recognition in the income statement. The new standard is effective for fiscal years beginning after December 15, 2019, including interim periods within those fiscal years. The Diocese is currently evaluating the impact of the adoption of ASU 2016-02 on its financial statements.

In August 2016, the FASB issued ASU 2016-14, "Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities." This ASU simplified and improves how a not-for-profit organization classifies its net assets, as well as the information it presents in financial statements and notes about its liquidity, financial performance, and cash flows. The new standard is effective for fiscal years beginning after December 15, 2017. Early adoption is permitted. The Diocese is currently evaluating the impact of the adoption of ASU 2016-14 on its financial statements.

In August 2016, the FASB issued ASU 2016-15, "Statement of Cash Flows (Topic 230): Classification of Certain Cash Receipts and Cash Payments (A Consensus of the FASB Emerging Issues Task Force)." To reduce diversity in practice, the ASU provides solutions for eight specific statement of cash flow classification issues. The new standard is effective for fiscal years beginning after December 15, 2019. Early adoption is permitted. The Diocese is currently evaluating the impact of the adoption of ASU 2016-15 on its financial statements.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 1. Organization and Summary of Significant Accounting Policies (Continued)

In November 2016, the FASB issued ASU 2016-18, "Statement of Cash Flows (Topic 230): Restricted Cash (a consensus of the FASB Emerging Issues Task Force)," which provides guidance on the presentation of restricted cash or restricted cash equivalents in the statement of cash flows. ASU 2016-18 will be effective for the Diocese beginning on January 1, 2019. ASU 2016-18 must be applied using a retrospective transition method with early adoption permitted. The Diocese is in the process of evaluating the impact of this guidance on its financial statements.

Note 2. Investments

As of December 31, 2016 and 2015 the Diocese had approximately 89% 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:

	2016	2015
Diocesan investment trust - stock fund	\$ 13,136,318	\$ 11,984,967
Diocesan investment trust - income fund	10,205,355	10,165,382
Diocesan investment trust - fossil fuel free stock fund	8,407,450	7,924,862
Domestic equity securities	1,345,280	1,270,560
Real estate investment trust	1,619	35,883
Mutual funds	1,627,613	1,596,522
Bond funds	1,012,101	997,608
Total investments	<u>\$ 35,735,736</u>	<u>\$ 33,975,784</u>

The investment in the real estate investment trust (the "Trust") was illiquid and was carried at adjusted cost at December 31, 2015. During the year ended December 31, 2016, the Trust, upon approval of its shareholders, adopted a plan of liquidation and dissolution. As a result, the Trust declared and paid a distribution to all shareholders. The balance at December 31, 2016 represents the final distribution to be paid in April 2017. As of December 31, 2016 and 2015, there were no unfunded commitments outstanding.

Investment return from these investments for the years ended December 31, 2016 and 2015 is summarized as follows:

	2016	2015
Non-endowment return:		
Realized and unrealized gains (losses)	<u>\$ 57,635</u>	<u>\$ (5,474)</u>
Endowment return:		
Interest and dividends	\$ 549,760	\$ 510,198
Investment fees	(153,717)	(189,592)
Realized and unrealized gains (losses)	1,500,570	(671,035)
	<u>1,896,613</u>	<u>(350,429)</u>
Distributed under Diocesan spending policy	(999,195)	(874,039)
Investment income (losses) from endowment investments, net of spending policy	<u>\$ 897,418</u>	<u>\$ (1,224,468)</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements

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

Level 1: Quoted prices for identical assets and liabilities traded in active exchange markets, such as the New York Stock Exchange.

Level 2: Observable inputs other than Level 1 including quoted prices for similar assets or liabilities, quoted prices in less active markets, or other observable inputs that can be corroborated by observable market data. Level 2 can also include derivative contracts whose value is determined using a pricing model with observable market inputs or can be derived principally from or corroborated by observable market data.

Level 3: Unobservable inputs supported by little or no market activity for financial instruments whose value is determined using pricing models, discounted cash flow methodologies, or similar techniques, as well as instruments for which the determination of fair value requires significant management judgment or estimation; also includes observable inputs for nonbinding single dealer quotes not corroborated by observable market data.

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

During the year ended December 31, 2016 and 2015, there were no changes to the Diocese's valuation techniques that had, or are expected to have, a material impact on its statements of financial position or statements of activities.

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

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

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

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements (Continued)

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 2.93% and 3.90% at December 31, 2016 and 2015, 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:

	2016				Total
	Quoted Prices in Active Markets Level 1	Other Observable Inputs Level 2	Unobservable Inputs Level 3	Other Investments Measured at Net Asset Value (a)	
Investments:					
Diocesan Investment Trust Stock Fund	\$ -	\$ -	\$ -	\$ 13,136,318	\$ 13,136,318
Diocesan Investment Trust Income Fund	-	-	-	10,205,355	10,205,355
Diocesan Investment Trust Fossil Fuel Free Fund	-	-	-	8,407,450	8,407,450
Domestic equity securities	1,345,280	-	-	-	1,345,280
Mutual funds	1,627,613	-	-	-	1,627,613
Bond funds	1,012,101	-	-	-	1,012,101
Total investments	3,984,994	-	-	31,749,123	35,734,117
Beneficial interest in perpetual trusts	-	-	-	32,487,338	32,487,338
Pooled income fund	6,356	-	-	-	6,356
Interests in charitable remainder trusts	-	-	563,472	-	563,472
	<u>\$ 3,991,350</u>	<u>\$ -</u>	<u>\$ 563,472</u>	<u>\$ 64,236,461</u>	<u>\$ 68,791,283</u>
Total investments at fair value	\$ 35,734,117				
Real estate investment trust	1,619				
Total investments	<u>\$ 35,735,736</u>				

(a) In accordance with ASC Subtopic 820-10, certain investments that are measured at fair value using the NAV per share (or its equivalent) practical expedient have not been classified within the fair value hierarchy. The fair value amounts presented in this table are intended to permit reconciliation of the fair value hierarchy to amounts presented in the statements of financial position.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements (Continued)

	2015					Total
	Quoted Prices in Active Markets Level 1	Other Observable Inputs Level 2	Unobservable Inputs Level 3	Other Investments Measured at Net Asset Value (a)		
Investments:						
Diocesan Investment Trust Stock Fund	\$ -	\$ -	\$ -	\$ 11,984,967		\$ 11,984,967
Diocesan Investment Trust Income Fund	-	-	-	10,165,382		10,165,382
Diocesan Investment Trust Fossil Fuel Free Fund	-	-	-	7,924,862		7,924,862
Domestic equity securities	1,270,560	-	-	-		1,270,560
Mutual funds	1,596,522	-	-	-		1,596,522
Bond funds	997,608	-	-	-		997,608
Total investments	3,864,690	-	-	30,075,211		33,939,901
Beneficial interest in perpetual trusts	-	-	-	31,549,969		31,549,969
Pooled income fund	7,857	-	-	-		7,857
Interests in charitable remainder trusts	-	-	538,228	-		538,228
	<u>\$ 3,872,547</u>	<u>\$ -</u>	<u>\$ 538,228</u>	<u>\$ 61,625,180</u>		<u>\$ 66,035,955</u>
Total investments at fair value	\$ 33,939,901					
Real estate investment trust	35,883					
Total investments	<u>\$ 33,975,784</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:

	2016	2015
Balance, beginning of year	\$ 538,228	\$ 564,807
Change in value of beneficial interest in trusts	25,244	(26,579)
Balance, end of year	<u>\$ 563,472</u>	<u>\$ 538,228</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 3. Fair Value Measurements (Continued)

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

	Fair Value 2016	Valuation Technique	Level 3 Unobservable Input	Range of Inputs
Interests in charitable remainder trusts	<u>\$ 563,472</u>	Value of underlying assets and present value techniques	Rate of Return Discount Rate Life Expectancy	5% 2.93% 3.21-5.22 years
	Fair Value 2015	Valuation Technique	Level 3 Unobservable Input	Range of Inputs
Interests in charitable remainder trusts	<u>\$ 538,228</u>	Value of underlying assets and present value techniques	Rate of Return Discount Rate Life Expectancy	5% 3.90% 2.21-5.22 years

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

	2016 NAV in Funds	2015 NAV in Funds	Number of Funds	Redemption Frequency	Redemption Restrictions
Diocesan Investment Trust Stock Fund (a)	\$ 13,136,318	\$ 11,984,967	1	Quarterly	Monthly
Diocesan Investment Trust Income Fund (b)	10,205,355	10,165,382	1	Quarterly	Monthly
Diocesan Investment Trust Fossil Fuel Free Fund (c)	8,407,450	7,924,862	1	Quarterly	Monthly
Beneficial interest in perpetual trusts (a) (b)	32,487,338	31,549,969	2	Illiquid*	N/A
	<u>\$ 64,236,461</u>	<u>\$ 61,625,180</u>	<u>5</u>		

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

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

(c) The purpose of the fund is to provide a consistent high level of income over time similar to what may be produced in the broadly defined investment grade taxable bond markets. The fund is expected to remain within 30 basis points (plus or minus) of that of its blended benchmark.

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

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 4. Mortgages Receivable and Notes Receivable, Affiliated Entities

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

	2016	2015
Performing loans	\$ 2,866,869	\$ 3,273,819
Nonperforming loans	220,954	230,551
	<u>3,087,823</u>	<u>3,504,370</u>
Less allowance for doubtful accounts	(100,000)	(118,102)
	<u>\$ 2,987,823</u>	<u>\$ 3,386,268</u>

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

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

	Total	Current	1-60 Days	60-90 Days	90+ Days Past Due
2016	<u>\$ 3,087,823</u>	<u>\$ 2,627,829</u>	<u>\$ 239,040</u>	<u>\$ -</u>	<u>\$ 220,954</u>
2015	<u>\$ 3,504,370</u>	<u>\$ 3,047,937</u>	<u>\$ 200,855</u>	<u>\$ 25,027</u>	<u>\$ 230,551</u>

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

	2016	2015
Balance, beginning	\$ 118,102	\$ 28,102
Change in allowance for doubtful accounts	(18,102)	90,000
Balance, ending	<u>\$ 100,000</u>	<u>\$ 118,102</u>

Included in mortgage notes receivable are mortgages of the Stokes Fund, a permanently restricted net asset revolving loan fund, which provides interest-bearing loans to parishes and affiliated organizations for capital improvements and repairs. At December 31, 2016 and 2015, Stokes Fund loans outstanding of \$2,098,406 and \$2,533,158, respectively, bear interest at rates ranging from 3.5% to 3.75% and mature at various dates through 2031. The recorded allowance for uncollectible loans in the Stokes Fund totaled \$100,000 and \$118,102 at December 31, 2016 and 2015, respectively.

The following Stokes loans were made during 2016:

Christ Church - Medway	\$ 30,145
All Saints' - Attleboro	62,693
Trinity Church - Bridgewater	6,798
	<u>\$ 99,636</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 4. Mortgages Receivable and Notes Receivable, Affiliated Entities (Continued)

The following Stokes loans were made during 2015:

Trinity Church - Wrentham	\$ 82,000
St. James Church - Groveland	20,349
St. James Church - Somerville	33,525
Church of Our Redeemer - Lexington	100,000
St. John's Church - Holbrook	90,000
Trinity Church - Bridgewater	69,085
	<u>\$ 394,959</u>

In addition to Stokes loans, the Diocese has granted mortgage notes collateralized by real estate, principally from board-designated, unrestricted net assets, to certain Diocesan clergy and to nine congregations. These loans bear interest from 2.31% to 2.75% and mature at various dates through 2039.

As of December 31, mortgages and notes receivable were comprised of the following:

	<u>2016</u>	<u>2015</u>
Parishes – Stokes loans	\$ 2,098,406	\$ 2,533,158
Parishes – other loans	625,296	589,780
Diocesan clergy	364,121	381,432
Total	<u>\$ 3,087,823</u>	<u>\$ 3,504,370</u>

Note 5. Pledges Receivable, Restricted

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

Equipping congregations for strategic local mission	45%
Transforming the Cathedral Church of St. Paul	20% up to a maximum of \$4,000,000
Tithing for mission beyond the Diocese	10%
Environmental initiatives	10%
Endowing the Barbara C. Harris Center	10% up to a maximum of \$2,000,000
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

Note 5. Pledges Receivable, Restricted (Continued)

During 2016, the Diocese commenced a collaborative capital campaign with three parishes. Similar to the original 2011 parish collaborative campaign, the Diocese receives 30% of all funds collected, with the parishes receiving the remaining 70% less a charge for administration of pledge processing. Net funds received by the Diocese under this campaign are restricted to provide additional support for the Together Now Mission Hub Initiative.

At December 31, 2016 and 2015, the Diocese owed \$1,776,261 and \$2,638,575, 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:

	2016	2015
Pledges receivable:		
In one year or less	\$ 2,650,248	\$ 2,869,696
Between one and five years	1,518,040	3,339,105
	4,168,288	6,208,801
Less discount to net present value	(104,380)	(121,662)
Less allowance for estimated uncollectible pledges	(416,829)	(620,880)
	<u>\$ 3,647,079</u>	<u>\$ 5,466,259</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 1.10% to 1.88% in 2016 and 2015.

Pledges receivable are primarily from foundations, churches and individuals located throughout Massachusetts.

Note 6. Property, Buildings and Equipment

Property, buildings and equipment consist of the following at December 31:

	2016	2015
Land	\$ 13,300	\$ 13,300
Buildings and building improvements	7,473,306	7,460,218
Equipment	323,219	177,101
Furniture and fixtures	58,048	58,048
Motor vehicles	83,547	83,547
	7,951,420	7,792,214
Less accumulated depreciation	(2,924,878)	(2,666,340)
Property, buildings and equipment, net	<u>\$ 5,026,542</u>	<u>\$ 5,125,874</u>

Depreciation expense for the years ended December 31, 2016 and 2015 was \$258,538 and \$209,517, respectively.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 7. Due to and from Affiliated Entities

Certain officers and employees of the Diocese assist in the management and administration of the funds of Trustees of Donations and other related entities. In addition, the Diocese pays certain administrative and other expenses on behalf of several affiliated entities, for which it is to be reimbursed in full. The amounts due to the affiliated entities totaled \$120,627 at December 31, 2016. The amounts due from the affiliates totaled \$319,052 at December 31, 2015. In addition, the Diocese pays the Cathedral for building space and for certain administrative services.

Note 8. Funds Held for Other Beneficiaries and Affiliated Entities

Funds held for other beneficiaries and affiliated entities consist of the following at December 31:

	2016	2015
Funds held for other beneficiaries	\$ 1,178,585	\$ 1,183,345
Society for the Relief of Aged or Disabled Clergy	2,648,058	2,578,477
Society for the Relief of Widows, Widowers and Orphans of Clergy	1,020,692	993,776
	<u>\$ 4,847,335</u>	<u>\$ 4,755,598</u>

Changes in funds for other beneficiaries and affiliated entities consist of the following for the years ended December 31:

	2016	2015
Balance, beginning of year	\$ 4,755,598	\$ 5,407,278
Spending policy draws net of contributions	(183,684)	(310,104)
Funds expended	(221,796)	(426,790)
Investment earnings	497,217	85,214
Balance, end of year	<u>\$ 4,847,335</u>	<u>\$ 4,755,598</u>

Note 9. Property Held in Trust for Others

The Diocese has a "remainder interest" in all of the assets including cash, investments and real estate of each of the 161 Episcopal parishes and missions within its borders, such that should an Episcopal congregation cease to function, its assets revert to the control of the Diocese. These properties are not occupied or maintained by the Diocese, nor do the programs of the Diocese derive any direct benefit from its "remainder interest". They are, therefore, not reflected in the Diocese's financial statements, unless the Episcopal congregation ceases to function and title has been given to the Diocese.

Note 10. Investment in Property and Buildings and Lease Agreement with Affiliate

In 1989, a major renovation of the Sears and Clark Building and The Cathedral Church of St. Paul (the "Cathedral") was completed. This renovation was made pursuant to an agreement between the Cathedral and the Diocese for the renovation of these buildings for joint occupancy by the Cathedral and the Diocese under a lease from the Cathedral to the Diocese. In 2006, a new lease was signed for the facilities used by the Diocese, which requires the Diocese to make rental payments of \$1 per year plus a prorated share of the operating and maintenance expenses.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 10. Investment in Property and Buildings and Lease Agreement with Affiliate (Continued)

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, 2016 and 2015 (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 2016 and 2015, the Diocese made \$450,000 and \$441,600, respectively, in payments in lieu of rent to the Cathedral under a verbal agreement between the two parties. In addition, during 2016 and 2015, the Cathedral made \$103,200 in payments to the Diocese to cover its share of administrative costs. During 2016 and 2015, the Cathedral contributed \$30,000 to the Diocese in support of its mission.

Note 11. Gain from Sale of Property from Closed Parishes

During 2016 and in prior years, various churches were closed. In accordance with Canon Law, any property of the closed churches reverts to the control of the Diocese once title to the property is passed to the Diocese at which time it is recorded at its estimated fair value. During 2016 and 2015, the Diocese sold property of previously closed churches, resulting in a recognized a gain of approximately \$1,965,000 and \$136,000, respectively.

Note 12. Net Assets

Temporarily restricted net assets consist of the following at December 31:

	2016	2015
Accumulated appreciation on permanently restricted net assets	\$ 10,251,274	\$ 9,783,963
Endowment funds restricted by donors for various programs	1,614,534	1,565,309
Bishop's directed trust funds restricted for various programs	117,686	68,353
Funds for support of programs	130,658	130,995
Together Now Campaign	5,509,321	6,838,091
	<u>\$ 17,623,473</u>	<u>\$ 18,386,711</u>

Temporarily restricted net assets were released from restrictions as follows:

	2016	2015
Capital campaign	\$ 2,259,408	\$ 1,360,611
Strategic ministries	915,798	1,727,076
Bishop's directed funds	194,464	217,687
Development grants	355,991	169,520
Diocesan staffing	85,859	79,747
Clergy programs	32,013	16,624
Scholarships	20,765	59,206
Sabbaticals	8,821	8,202
	<u>\$ 3,873,119</u>	<u>\$ 3,638,673</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 12. Net Assets (Continued)

Permanently restricted net assets consist of the following at December 31:

	2016	2015
Funds to be held in perpetuity - endowment funds	\$ 7,003,569	\$ 6,928,849
Stokes revolving loan fund	4,334,769	4,281,296
Split interest agreements	33,057,166	32,096,054
	<u>\$ 44,395,504</u>	<u>\$ 43,306,199</u>

The Diocesan Council has designated certain unrestricted net assets as a Diocesan Council designated endowment fund. The board designated endowment is invested in the DIT.

Endowment net assets: Endowment net asset composition by type of fund as of December 31, 2016 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Donor restricted endowment funds	\$ -	\$ 11,865,808	\$ 7,003,569	\$ 18,869,377
Diocesan Council designated endowment funds	12,643,805	-	-	12,643,805
Total endowment net assets	<u>\$ 12,643,805</u>	<u>\$ 11,865,808</u>	<u>\$ 7,003,569</u>	<u>\$ 31,513,182</u>

Changes in endowment net assets for the year ended December 31, 2016 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Endowment net assets at beginning of year	\$ 9,873,618	\$ 11,349,272	\$ 6,928,849	\$ 28,151,739
Contributions or designations	2,464,025	-	-	2,464,025
Dividend and interest income	190,404	359,356	-	549,760
Realized and unrealized gains, net of investment fees	454,570	817,563	74,720	1,346,853
Appropriation of endowment net assets for expenditure	(338,812)	(660,383)	-	(999,195)
Endowment net assets at end of year	<u>\$ 12,643,805</u>	<u>\$ 11,865,808</u>	<u>\$ 7,003,569</u>	<u>\$ 31,513,182</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 12. Net Assets (Continued)

Endowment net asset composition by type of fund as of December 31, 2015 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Donor restricted endowment funds	\$ -	\$ 11,349,272	\$ 6,928,849	\$ 18,278,121
Diocesan Council designated endowment funds	9,873,618	-	-	9,873,618
Total endowment net assets	<u>\$ 9,873,618</u>	<u>\$ 11,349,272</u>	<u>\$ 6,928,849</u>	<u>\$ 28,151,739</u>

Changes in endowment net assets for the year ended December 31, 2015 were as follows:

	Designated by Diocesan Council Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Endowment net assets at beginning of year	\$ 9,465,962	\$ 12,082,565	\$ 7,115,729	\$ 28,664,256
Contributions or designations	2,120,340	-	-	2,120,340
Dividend and interest income	189,695	320,503	-	510,198
Realized and unrealized losses, net of investment fees	(234,614)	(439,133)	(186,880)	(860,627)
Appropriation of endowment net assets for expenditure	(259,376)	(614,663)	-	(874,039)
Additional board approved withdrawals	(1,408,389)	-	-	(1,408,389)
Endowment net assets at end of year	<u>\$ 9,873,618</u>	<u>\$ 11,349,272</u>	<u>\$ 6,928,849</u>	<u>\$ 28,151,739</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:

	2016	2015
Future plans for ministry in Brockton	\$ 96,787	\$ 199,564
Chelsea project	-	81,108
	<u>\$ 96,787</u>	<u>\$ 280,672</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.

At December 31, 2016, the total amount of unfunded deposits to the endowment fund for congregational vitality approximate \$680,000. These funds are included in Restricted Cash in the accompanying statement of financial position, and will be transferred to the endowment fund for congregational vitality once certain matters related to the sale of the parish sold during 2016 are finalized. At December 31, 2015, the endowment fund for congregational vitality was fully funded and is invested in the DIT.

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 12. Net Assets (Continued)

During 2016 and 2015, \$183,885 and \$155,001, respectively was authorized and expended from the non-endowment unrestricted funds available for recommendations from the Diocesan Council.

Note 13. Interests in Split-interest Agreements

Interests in charitable remainder trusts: The Diocese has been named as a beneficiary of an irrevocable charitable remainder trust and pooled income fund. The fair value of these assets are calculated using present value techniques and are \$569,828 and \$546,085 at December 31, 2016 and 2015, 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 \$587,094 and \$568,328 at December 31, 2016 and 2015, respectively. These assets will be donated to the Diocese upon the death of the income beneficiary in accordance with each individual trust agreement.

The net change in the interests in charitable remainder trusts is reflected in the accompanying statements of activities under the caption "changes in value of beneficial interests in trusts" and totaled \$23,743 in gains and \$27,455 in losses for 2016 and 2015, respectively.

Beneficial interest in perpetual trusts: The Diocese has a 100% beneficial interest in 56 perpetual trusts and 50% beneficial interest in 1 perpetual trust held by third parties at December 31, 2016 and 2015. The principal as well as annual gains or losses on the trust investments are restricted in perpetuity. The interest and dividend income generated by the trust investments is distributed each year to the Diocese. The net change in the interests in perpetual trusts is reflected in the accompanying statements of activities under the caption "changes in value of beneficial interests in trusts" and totaled \$937,369 in gains and \$1,585,118 in losses for 2016 and 2015, respectively. Distributions received by the Diocese from the trusts were \$1,256,989 and \$1,159,964 during the years ended December 31, 2016 and 2015, respectively.

Note 14. Litigation

In accordance with generally accepted accounting principles, certain claims, suits and complaints arising in the ordinary course of business have been filed or are pending against the Diocese. In the opinion of management, all such matters are adequately covered by insurance, or if not so covered, are without merit or are of such kind, or involve such amounts, as would not have a significant effect on the financial position or activities of the Diocese if disposed of unfavorably. Management's estimate of liabilities from these claims may change in the near term depending upon the ultimate outcome of these proceedings.

Note 15. Functional Classification of Expenses

Expenses by functional classification for the years ended December 31 are as follows:

	2016	2015
Program	\$ 9,464,876	\$ 9,126,558
Management and general	2,278,929	2,249,313
Fundraising	221,601	201,649
	<u>11,965,406</u>	<u>11,577,520</u>
Capital campaign	211,882	101,166
	<u>\$ 12,177,288</u>	<u>\$ 11,678,686</u>

The Protestant Episcopal Diocese of Massachusetts

Notes to Financial Statements

Note 16. Pension Plan

Lay employees of the Diocese are provided pension benefits under a defined contribution plan. The Diocese contributes 10% of employee salaries to the plan. The amounts charged to expense for lay pensions in 2016 and 2015 were \$173,636 and \$158,585, respectively.

Note 17. Commitments

The Diocese contributes to a non-contributory defined benefit plan, the Clergy Plan, administered by the Church Pension Fund (the "Fund"). The Fund was established by the General Convention of the Episcopal Church; the Fund and its affiliates are official agencies of the Episcopal Church for these purposes and operate under the Canons of the Episcopal Church. The Fund was established to administer the clergy pension system of the Episcopal Church, including pensions, insurance, annuities, health and other programs. The plan is a single employer plan, where the Protestant Episcopal Church is the employer.

The Clergy Plan is a defined benefit plan providing retirement, death and disability benefits to eligible clergy of the Episcopal Church. The Diocese contributes to the plan at an assessed rate of 18% of total clergy compensation for clergy employed by the Diocese. Contributions to this plan totaled \$307,457 and \$280,188 for the years ended December 31, 2016 and 2015, respectively.

Note 18. Subsequent Events

The Diocese has evaluated subsequent events through June 26, 2017, the date the financial statements were available to be issued.

REPORTS TO BE RECEIVED BY TITLE:

**DIOCESAN COUNCIL REPORT
 STANDING COMMITTEE REPORT
 COMMISSION ON MINISTRY REPORT**

**THE 232ND ANNUAL CONVENTION
 OF THE DIOCESE OF MASSACHUSETTS
 CATHEDRAL CHURCH OF ST. PAUL,
 BOSTON, MASSACHUSETTS**



DIOCESAN COUNCIL REPORT TO CONVENTION AUGUST 2016 - JUNE 2017

The Diocesan Council met ten times during the 2016-2017 program year. On a regular basis, Council received reports from the bishops and updates from committees and task forces. All meetings were held at the Cathedral Church of St. Paul in Boston, unless otherwise noted. The following summarizes particular issues Council considered or discussed at each meeting.

August, 18, 2016

- Approved clergy housing allowances.
- Reviewed a draft of the proposed diocesan mission strategy and provided feedback.

September 10, 2016, at Trinity Church, Concord

- Reviewed the latest draft of the proposed diocesan mission strategy.
- Heard a proposal for evaluating the mission strategy once it is approved by Diocesan Convention.
- Heard a report from the Budget Committee chair, the Rev. Stephen Voysey, on the proposed 2017 diocesan budget.
- Voted to adopt the proposed mission strategy for proposal to Diocesan Convention.
- Agreed on the process by which members of the Phase IV Mission Strategy Implementation Organizing Team would be nominated and elected.
- Voted to adopt the Phase IV Mission Strategy Implementation Organizing Team charter.
- Voted to accept the recommendation of the Assessment Coordinating Committee to lower the 2017 assessments for 16 parishes by a total of \$75,000.
- Voted to endorse the 2017 proposed budget as presented and to recommend favorable action by Diocesan Convention on the motions presented in the budget book.
- Heard a report from the diocesan treasurer, Lisa Garcia, on the work of the Assessment Formula Review Committee and on Budget Committee vacancies.
- Heard an update on Diocesan Convention nominations, resolutions and proposed amendments to the diocesan Constitution and Canons.
- Heard that the Executive Committee participated in a Visions, Inc., training over the summer; voted to adopt the Visions, Inc., guidelines as its own in members' work with one another; and to review said guidelines annually.

October 27, 2016

- Elected six members to the Phase IV Mission Strategy Implementation Organizing Team.
- Voted to approve a budget recategorization submitted by the Boston-Cambridge Mission Hub.
- Voted to approve the Roxbury-Dorchester Mission Hub's second year budget for up to \$141,196.
- Heard an update about the South Shore Mission Hub.
- Voted to approve the following roster for the Mission Hub Implementation Committee: Joyce Harrington, The Rev. Thea Keith Lucas, Isaac Martinez, Stephen Mascoll, The Rev. H. Mark Smith, The Rev. Stephen Voysey, The Rev. Sammy Wood and John Woodard, with five ex-officio members: The Rev. Canon Libby Berman, Cindy Cushman, Diane D'Souza, Jin Min Lee and Steve Matthews. John Woodard was appointed the interim chair of the committee.
- Heard a mission strategy report, including plans for Diocesan Convention.
- Heard a report from the diocesan treasurer, Lisa Garcia.
- Voted to approve a proposed debt repayment plan for Grace Church in North Attleboro.
- Voted to direct the secretary of the diocese to not omit the names of the lay delegates to Diocesan Convention for St. Mary's Church in Rockport for this year; its assessment arrearages would have made it eligible to lose its lay delegates' vote at convention.
- Formed a subcommittee to plan the Jan. 20-21, 2017, Diocesan Council retreat at the Barbara C. Harris Camp and Conference Center.
- Thanked outgoing members of Diocesan Council whose terms expire as of Diocesan Convention 2016.

November 17, 2016

- Voted electronically on Nov. 17, 2016, to affirm the appointment of Win Treese and the Rev. Nancy Gossling as co-chairs of the Mission Strategy Implementation Organizing Team.

December 15, 2016

- Voted to accept the audit of the 2015 financial statements of the Diocese of Massachusetts as prepared by RSN US LLP.
- Heard a report from the development director, Lynd Matt, on the progress of the Annual Fund to date.
- Heard a report from the mission hub program director, Jin Min Lee, on the South Shore Mission Hub and overall hub funding.
- Voted to increase the mission hub program director's position from 20 hours per week to 30 hours per week, effective Jan. 1.
- Heard a mission strategy report from the Implementation Organizing Team's co-chairs, Win Treese and the Rev. Nancy Gossling.
- Voted to approve clergy housing allowances for 2017.
- Voted to approve the assessment arrearage payment plan outlined in a letter to Grace Church in Salem, dated Oct. 12, 2016.
- Voted to change the assessment for the Church of Our Saviour in Arlington from \$12,927 to \$9,893.84, due to an error in a previous parochial report.
- Voted that \$50,000 for expenses related to mission strategy come from the Fund for Congregational Vitality.
- Heard an Executive Committee report that included the vote taken at its Dec. 1, 2016, meeting to forgive charges that the diocese would have incurred during the Cathedral Church of St. Paul's merger with the former Church of St. John the Evangelist in Boston.

January 20-21, 2017 Retreat at the Barbara C. Harris Camp and Conference Center, Greenfield, NH

- Voted to affirm the nominations of the following people to the Executive Committee for one-year terms: The Rev. Rebecca Black, The Rev. Karen Coleman, Carol Friar, Lisa Garcia, Connie Melahoures, The Rev. Tom Mousin and The Rev. Debbie Phillips.

February 23, 2017

- Heard a report from the mission hub program director, Jin Min Lee, and voted to accept the Mission Hub Implementation Committee's recommendation of a three-tiered hub budget cut system to close a \$1.6-million funding gap: 70 percent of requested maximum for original requests of \$1 million; 75 percent of requested maximum for original requests of \$750,000; or 80 percent of requested maximum for original requests of less than \$750,000.
- Heard a proposal from Bishop Alan M. Gates for an appeals process to the three-tiered budget cut system.
- Heard a proposal from creation care advocates for funding green grants in 2017.
- Heard a report from the Mission Strategy Implementation Organizing Team's co-chair Win Treese and an update about a proposed evaluation process for diocesan budget items.
- Heard a report from the treasurer, Lisa Garcia, which included an update from the Assessment Formula Review Committee, preliminary financial results for 2016 and a summary of parishes that are in arrears on their 2016 assessments.
- Voted to instruct the Assessment Formula Review Committee to construct proposals for new assessment formulas for 2018 which will result in a 10 percent net decrease in aggregate assessments received, to be reviewed at the March and April Diocesan Council meetings.

March 23, 2017

- Heard a report from the mission hub program director, Jin Min Lee, and voted not to approve the proposed South Shore Mission Hub budget.
- Heard that Bishop Gates has formed an ad hoc committee to work with the South Shore Mission Hub to review its programming and budget, and an ad hoc committee to review the appeal from the Merrimack Valley Mission Hub regarding the recent overall hub budget cuts.
- Voted against a motion that would have authorized the Treasurer's Office to move \$150,000 from the Green Loans fund into the Green Grants fund for 2017.
- Voted to adopt Visions, Inc., guidelines for use in Diocesan Council meetings.
- Heard an update on plans to improve communication between Diocesan Council and the deaneries.
- Voted to approve a clergy housing allowance adjustment for 2017.
- Heard that the Compensation and Benefits Committee will be conducting a salary survey in 2018.
- Heard a report from the diocesan treasurer, Lisa Garcia, which included three proposals for a new assessment formula that would result in a 10 percent decrease in aggregate assessments received in 2018, to be voted on at the April Diocesan Council meeting.
- Heard a report from the co-chairs of the Mission Strategy Implementation Organizing Team, Win Treese and the Rev. Nancy Gossling, which included an update about the process for evaluating strategic ministries for the 2018 budget, and voted to approve said process as presented.

April 27, 2017

- Heard an update from the mission hub program director, Jin Min Lee, on several of the mission hubs and voted to approve the Boston-Cambridge Mission Hub's proposed 18-month budget (valid January 2017 through June 2018) for maximum spending of \$236,168.
- Heard an update from the Mission Strategy Implementation Organizing Team co-chairs, the Rev. Nancy Gossling and Win Treese.
- Heard a report from the diocesan treasurer, Lisa Garcia, on proposed 2018 assessment formulas, and voted a new assessment formula for 2018 as follows:
Where BASE for 2018 is equal to line 14 ("all other operating expenses") from the 2015 parochial report, less line 7 ("assistance from diocese"), the following rates shall be applied:
 - 0.15% on expenses from \$0 to \$50,000*
 - 14.5% on expenses from \$50,001 to \$500,000*
 - 15.5% on expenses over \$500,000**For a mission, the 2018 assessment is two-thirds the amount that would be assessed if the congregation were a parish.*

May 18, 2017

- Heard from the South Shore Mission Hub Ad Hoc Review Committee that the South Shore Mission Hub has decided to cease its work as a hub.
- Heard an update from the Rev. Canon Libby Berman on behalf of the Task Force for Parish Closings and Mergers.
- Heard an update from the Mission Strategy Implementation Organizing Team co-chairs, the Rev. Nancy Gossling and Win Treese.
- Reviewed a draft of the proposed 2018 diocesan budget.
- Voted to authorize the Assessment Coordinating Committee to consider and receive requests from congregations for adjustments to the 2018 scheduled assessments, with total adjustments not to exceed \$67,500.
- Voted to appoint Rob Kelleher, Connie Melahoures, the Rev. Tom Mousin and Lynn Smith to the Assessment Coordinating Committee.

June 15, 2017

- Voted a letter of gratitude be sent to Win Treese, who is stepping down as co-chair of the Mission Strategy Implementation Organizing Team.
- Heard a mission strategy update from consultant Kristin Hendler.
- Heard a report from the mission hub program director, Jin Min Lee, on several of the hubs, and voted approval of the following hub budgets:
 - Plymouth, Cape and Islands Mission Hub for 2017, maximum spending of \$70,292.28.
 - North Shore Mission Hub for 2017, maximum spending of \$222,195.
 - Metrowest Mission Hub for 2017-2018, maximum spending of \$156,571.
 - Merrimack Valley Mission Hub, allocation of \$70,000, with \$55,000 of that amount to be allocated from the proceeds of unspent funds from the South Shore Mission Hub and \$15,000 granted from the Sears Fund, with the request that the hub reexamine its budget to find possibilities for reduced spending in order to complete its program year.
- Heard possibilities for other uses of the remaining unspent funds from the South Shore Mission Hub.
- Voted that the Executive Committee at its next meeting will review and vote on the budget for the South Coast Mission Hub.
- Voted to accept the audit of the 2016 financial statements of the diocese.
- Reviewed an updated version of the proposed 2018 diocesan budget.
- Voted to allocate 25 percent of assessment revenue from the 2018 operating budget to strategic ministries.
- Voted to authorize the withdrawal of up to \$150,000 from the agency funds of the diocese for severance and outplacement assistance for diocesan staff in 2018.
- Reviewed the positions to be filled by election at this year's Diocesan Convention.

Respectfully Submitted,

Laura Simons
Assistant Secretary

STANDING COMMITTEE REPORT TO CONVENTION SEPTEMBER 2016 – JUNE 2017

The Standing Committee's work includes matters pertaining to real estate, Stokes Loans, parish by-laws and/or constitution revisions, and the ordination process. The following is a summary of the votes taken by the Standing Committee over the past year. All meetings took place at the diocesan offices unless otherwise noted.

On September 8, 2016:

- VOTED to provide its advice and consent for the following motions:
 - To sell the property located at 1900 Commonwealth Avenue, Auburndale, Massachusetts to an interested buyer at a sales price not less than 90% of the appraised value ($90\% \times \$3,485,000 = \$3,316,500$), with the provision that this buyer will: (i) successfully resolve the remaining lease term in effect with the Brookline Infant and Toddler Childcare (BITC) to the satisfaction of BITC in the event the buyer desires to have BITC vacate the property prior to August 31, 2019, or (ii) permit BITC to remain as a tenant at sufferance until August 31, 2019. The buyer may take whatever legal steps necessary to require BITC to vacate the premises by August 31, 2019, but not sooner;
 - That the proceeds from any sale are to be conditioned as follows: (1) that the net proceeds for the sale shall be deposited in an investment account for safe-keeping under the Trustees of Donations to the Protestant Episcopal Church in a named fund under the name of Trinity Parish of Newton Centre; and (2) that any withdrawal of principal or use of income through a spending policy draw would be subject to the review and approval of the Standing Committee and the Bishop Diocesan, in consultation with the Congregational Development Team and the Real Estate Advisory Committee or its successors or other Standing Committee designated bodies;
 - That this vote supersedes any prior votes taken regarding the sale of the Auburndale property.
- VOTED to provide its advice and consent to the placing of an encumbrance on the property of St. Augustine and St. Martin, 29 Lenox Street, Boston, due to their entering into a "Solar Power Purchasing Agreement" with Private Securities Market LLC (PSM) under which PSM will erect and service an 18.2 kW solar array on the church and the church will agree to purchase the array's electricity output for 25 years.
- VOTED to provide its advice and consent to sell the property at 138 West Plain Street, Wayland, at a price not below \$603,500 ($710,000$ (appraised value) $\times 85\% = \$603,500$).
- VOTED, per the recommendation of the Real Estate Advisory Committee, to provide its advice and consent for a Stokes Loan in the amount of \$100,000 for St. Andrew's Church, Ayer, for the restoration of the exterior church envelope, such loan for a term of 15 years at an interest rate of 3.75%, and to the placing of a lien on a property located at 7 Faulkner Street, Ayer; and that the proceeds of this loan only be disbursed upon the satisfactory completion of the work and receipt of final lien waivers from the contractor and any subcontractors acknowledging that the contractor and all his subcontractors have been paid in full and relinquish their right to place liens on the congregation's property.
- VOTED to approve the extension of interest-only payments by Christ Church, Hyde Park on two outstanding Stokes Loans through December 2017, as recommended by the Diocesan Loan Committee. The Standing Committee further urges investigation of debt forgiveness.
- VOTED to consent to the election of the Very Rev. Dr. DeDe Duncan-Probe as Bishop Diocesan of the diocese of Central New York.
- VOTED to consent to the election of the Rt. Rev. Santosh K. Murray as Bishop Diocesan of the diocese of Easton (Eastern Maryland).
- VOTED to consent to the election of the Rev. Canon Jose A. McLoughlin as Bishop Diocesan of the diocese of Western North Carolina.

On October 13, 2016:

- VOTED to refer the letter sent from Trinity Parish, Newton Centre, dated Thursday, October 6, 2016, to the Real Estate Advisory Committee and to the Canon for Congregations, Rev. Libby Berman, for comment.
- VOTED to provide its advice and consent for a Green Loan in the amount of \$100,000 for The Parish of St. Paul, Newton Highlands, for the replacement of a very old boiler with a high efficiency boiler and hot water system, such loan for a term of 15 years at an interest rate of 2.75%, and to the placing of a lien on the property located at 1135 Walnut Street, Newton Highlands.
- VOTED to provide its advice and consent for a Green Loan in the amount of \$21,000 for Trinity Episcopal Church, Stoughton, for the installation of a high efficiency boiler and a green lighting replacement project, such loan for a term of 15 years at an interest rate of 2.75% and to the placing of a lien on the property located at 414 Sumner Street, Stoughton.
- VOTED to approve the following candidates for ordination to the priesthood: Zachary Brooks, Marisa Egerstrom, Isaac Everett, Christopher Whiteman and Charles Wynder, Jr.
- VOTED to approve the by-laws of St. Paul's, Lynnfield as submitted.

On November 10, 2016:

- VOTED to appoint the Rev. Pamela Werntz as President of the Standing Committee.
- VOTED to appoint Angela McConney Scheepers, Esq. as Secretary of the Standing Committee.
- VOTED to provide its advice and consent that Trinity Church be allowed to place \$768,795 from the sale of proceeds into Trinity's extant DIT account, as outlined in their proposal to the Standing Committee of October 6, 2016.
- VOTED to approve the by-laws dated November 10, 2016 for St. Andrew's, Wellesley, subject to a parish vote of approval on the substantive changes.
- VOTED to consent to the election of the Ven. Carl Walter Wright as Bishop Suffragan for Armed Forces and Federal Ministries of The Episcopal Church.
- VOTED to the consent to the election of a Bishop Coadjutor for the Diocese of Haiti.

On December 8, 2016:

- VOTED to appoint Constance Perry as Vice President of the Standing Committee.
- VOTED to provide its advice and consent for an application by Christ Church (Old North), Boston, for landmark status by the Boston Landmarks Commission.
- VOTED to provide its advice and consent for a Diocesan Loan in the amount of \$6,798 for St. James', Groveland, for the replacement of a very old boiler in their rectory with a 95% efficient gas-fired boiler, such loan for a term of 15 years at an interest rate of 3.75%, and to the placing of a lien on the property located at 167 Washington Street, Groveland, MA 01834.
- VOTED to provide its advice and consent under the provisions of Canon 18 to the Bishop and to the Vestry of St. John's Church, Sandwich, to sell land and building abutting church property located at 2 Jarves Street, Sandwich, for an amount not less than \$190,000, a revision to their original floor price request of \$225,000 (dated November 2015), with the net proceeds to be used to make capital improvements to the remaining property of St. John's and if any remaining funds, to pay down other existing real estate debt on church property.
- VOTED to approve the By-laws for St. Peter's Church, Dartmouth as submitted on December 5, 2016.

On January 7, 2017 at Rolling Ridge Retreat Center, Andover, MA:

- VOTED to approve to amend the Group Agreement as follows:
 - 6. We will be intentional about claiming our role as diocesan leaders.
 - 11. We will be accountable and fully engage in deliberations: once a decision is made, we will not undermine it.
 - 12. We will take time at the end of our meetings to share appreciations and regrets.
- VOTED to consent to the election of the Rev. Canon Gretchen Mary Rehberg as Bishop Diocesan for the Diocese of Spokane.
- VOTED to consent to the election of the Rev. Jennifer Baskerville-Burrows as Bishop Diocesan for the Diocese of Indianapolis.

On February 9, 2017:

- VOTED to approve the following ten postulants for candidacy: Daniel Bell, Duncan Hilton, Sonia Hodge, Greg Johnston, Bernie Jones, Amanda March, Helen McKinney, Tamra Tucker, Amy Whitcomb Slemmer and Ruthann Savage-King.
- VOTED to approve the Real Estate Transaction Guide for Congregations as submitted, with the incorporation of the Standing Committee's grammatical revisions.
- VOTED to provide its consent to a request from Trinity, Newton Centre, that the annual dividends from the Messiah-sale DIT account be released to Trinity upon their request, to fund the maintenance, management and capital improvements to their physical plant not otherwise possible through their operating budget. The principal funds in this account remain restricted, and may only be released upon further consent of the Bishop and Standing Committee.

On March 9, 2017:

- VOTED to approve the following postulant for candidacy: Marilyn McMillian.
- VOTED to approve the following candidates for ordination to the transitional diaconate: Daniel Bell and Amanda March.
- VOTED to approve the following candidates for ordination to the transitional diaconate: Emily Garcia and Duncan Hilton.
- VOTED to approve the by-laws for Emmanuel Church, Boston, as revised.
- VOTED to consent to the election of the Rev. Canon Rafael L. Morales as Bishop Diocesan of the Diocese of Puerto Rico.
- VOTED to consent to the election of the Rev. Canon John H. Taylor as Bishop Coadjutor of the Diocese of Los Angeles.
- VOTED to ratify the election of the following members of Christ Church in the City of Boston (Old North Church): Jane Olszewski, Christine Clements, Judy Porteus, Wayne Webster, Anne Gwin, Carol Ball, Jessie Elliot, Sharon Ruatto-Steadman, Bruce Brooksbank, Richard Olsen, and Jennifer Guber.

On April 6, 2017:

- VOTED to approve the following candidate for ordination to the transitional diaconate: Amy Whitcomb Slemmer.
- VOTED to consent to the election of the Rev. Samuel S. Rodman, III as Bishop Diocesan of the Diocese of North Carolina.
- VOTED to consent to the election of the Rev. Jennifer Brooke-Davidson as Bishop Suffragan of the Diocese of West Texas.

On May 11, 2017:

- VOTED to approve Patrick LaFortune for ordination to the transitional diaconate on June 3, 2017.
- VOTED to approve edits to Section 4.2 and Section 8 of the Model By-laws.
- VOTED to approve a conflict of interest clause, to be numbered Section 14, with the other sections following to be renumbered to reflect this change of the Model By-laws.
- VOTED to provide its advice and consent to St. Mark's Episcopal Church, Burlington, MA to enter into a 32-month lease with Growing by Leaps and Bounds, Inc., Burlington, MA, provided that the utilities are separately metered and paid by the tenant, that the tenant provides a certificate of insurance which reflects liability insurance in an amount not less than \$4M per occurrence, and that the following is inserted into the proposed lease: "Lessee shall be responsible for any sales, property or income taxes imposed upon the demised premises or the income from this transaction." Additionally, it is strongly recommended that St. Mark's notify Church Insurance of this proposed lease.
- VOTED to provide its advice and consent under the provisions of Canon 18 to the Bishop and to the Vestry of the Church of the Messiah, Woods Hole, MA, to sell the property known as Fisher House under the following conditions: that the property be listed for sale with a licensed real estate broker; that the sales price be no less than \$1.65M, a revision to their original floor prices requested of \$2M (dated March 10, 2016); and that the parish establish an endowment fund from the entire net proceeds, withdrawals from which are subject to a maximum of the total return policy established annually by the Diocesan Investment Trust.
- VOTED to approve the report of the Real Estate Advisory Committee dated March 30, 2017 and detailing membership responsibilities and term limits.
- VOTED to consent to the election of the Rt. Rev. David C. Rice as Bishop Diocesan of the Diocese of San Joaquin.

On June 8, 2017:

- VOTED to provide its advice and consent for a Diocesan Loan in the amount of \$100,000 for Trinity Chapel, Shirley, MA, to re-finance a loan from Fidelity Cooperative Bank whose proceeds had been used for the purchase of a house next door to the chapel to serve as a rectory, such loan for a term of 15 years at an interest rate of 3.5%, and to the placing of a lien on the property located at 188 Center Road, Shirley, MA.
- VOTED to provide its advice and consent under the provisions of Canon 18 to the bishop and to the vestry of Trinity Episcopal Church, Stoughton, MA, to sell the property located at 81 Seaver Street, Stoughton, MA, under the following conditions: that the property be listed for sale with a licensed real estate broker; that the sales price be no less than \$280,000; that 75% of the net proceeds from the sale be set aside for a clergy housing fund with a spending policy to be established for an annual draw; and that the remaining 25% of the net proceeds be set aside to provide a challenge or matching fund for a future capital projects fund; and further, that this approval is subject to a satisfactory resolution to the relationship with the existing tenants.
- VOTED to consent to the withdrawal of up to \$36,000 for partial funding of the first year of a clergy salary at Bristol Trinity, North Easton, as soon as a Letter of Agreement has been completed with an incoming priest.

Respectfully Submitted,

Laura Simons
Assistant Secretary

COMMISSION ON MINISTRY 2017 REPORT TO CONVENTION

The Commission on Ministry (COM) has the privilege of working with the Bishops as they select and guide the formation of postulants and candidates in preparation for ordination to both the diaconate and priesthood. Our work is supported by many others, including sponsoring parishes and clergy, parish discernment committees, internship and field education parishes, seminaries, spiritual directors, and the families and friends of postulants and candidates.

Members of the COM serve as liaisons to parish discernment committees, advisors to postulants and candidates and meet monthly with the Bishops and Canon for Ordained Vocations. They work in collaboration with the Standing Committee to make the ordination process accessible and to improve coordination and communication among all those who participate in the work of discernment in this diocese.

We gratefully acknowledge the assistance and guidance of many in this diocese and beyond who help to form the women and men who are called to ordained leadership in the church. We particularly value the contributions of clergy and laity in preparing postulants and candidates for diaconal ministry and for the support of divinity school faculty.

In 2017 we welcomed The Rev. Kate Ekrem and Mr. Matthew Hutchings to the COM. We are very grateful to Ms. Karon Gibson-Mueller, co-chair, The Rev. Sara Irwin and Ms. Branwen Smith-King, who completed terms of service on the Commission on Ministry in 2017, and to Rev. Miraim Gelfer, who assumed the role of co-chair in Karon's stead. We would also like to thank the Rev. Dr. Edith Dolnikowski for her unwavering support and guidance to both the members of the COM and the postulants and candidates in the ordination process.

COM Statistics for 2017

In 2016 the Commission received commitment forms from nineteen inquirers, of which fourteen filed applications for postulancy after having worked with their parish discernment committees. Fourteen were invited to interview and thirteen were admitted to postulancy on June 1, 2017, eleven for the priesthood and two for the diaconate.

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 \$65,000 was awarded to eight postulants and candidates. Scholarships ranged from \$1,000 to \$15,500 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:

2017 marked the second year in several decades in which transitional deacons were ordained priests in the congregations to which they had been called to serve. Between December 2016 and March 2017 five transitional deacons were ordained to the priesthood, three of them in congregations in the Diocese of Massachusetts. In June 2017, five candidates were ordained as transitional deacons.

As of July 1, 2017 there were forty-one people in the ordination process as postulants, candidates and transitional deacons – twenty-nine for the priesthood and twelve for the diaconate. They come from twenty-seven sponsoring congregations throughout eight deaneries in the diocese.

The average age of the seven new postulants this year:

Year	Priesthood	Diaconate	Combined
2017	37	54	42

The average age of new postulants over the preceding seven years:

Year	Combined
2016	44
2015	38
2014	50
2013	43
2012	41
2011	36
2010	47
2009	45

Our current membership roster is as follows (as of September 2016): Dr. Laura Crain, The Rev. Kate Ekrem, The Rev. Miriam Gelfer, The Rev. Dr. Elizabeth Gibson, The Rev. Edgar Gutierrez-Duarte, The Rev. Eric Hillegas, The Rev. Daniel Horgan, Mr. Matthew Hutchings, The Rev. Edwin Johnson, The Rev. Sarah Mato, Mr. Graeme Mills, Ms. Kay Ridgard, The Rev. Dr. James Weiss and The Rev. Patricia Zifcak. The Rev. Dr. David Killian serves as Chaplain to our postulants and candidates.

We want to thank the members of the COM for their deep commitment to this ministry. Our diocese is blessed to have these wonderful souls at work, discerning the future leadership of the church. It is our privilege and joy to work with them.

Faithfully Submitted by:
Miriam Gelfer and Kay Ridgard
Co-chairs, Commission on Ministry



BPEACE for Jorge

Five years ago, violence struck at the heart of the Episcopal Diocese of Massachusetts when 19-year-old Jorge Fuentes was murdered while walking his dog outside his home in Dorchester. He was a remarkable young man and natural leader, adored by the children he mentored at St. Stephen's Church in Boston. Many in our diocese knew him because he grew up and worked in the B-SAFE summer and B-READY afterschool programs and loved the Barbara C. Harris Camp in New Hampshire. B-PEACE's work to address the root causes of violence continues to honor his memory.

Bishop's Action Steps toward Peace

Programs for Youth

Employment for Teens and Young Adults

Academic Excellence in Public Schools

Communities of Support for Families

End to Gun Violence through Reforms



BPEACEforjorge.net
diomass.org/b-peace
facebook.com/bpeaceforjorge
[@bpeaceforjorge](https://twitter.com/bpeaceforjorge)
bpeace@ststephensbos.org

Key Leaders

The Right Rev. Alan Gates, Bishop of Diocese of MA
Liz Steinhauser, *Convener of B-PEACE for Jorge Campaign*
Ned Notis-McConarty, *Leader of Gun Reform Committee*
Sarah O'Connor, *Leader of Youth Jobs Committee*
Maureen Burns, *Leader of School Partnership Committee*
Tim Crellin, *Leader of Education & Liturgy Committee*
Mirna Ramos, *Community Leader*
Many teens, *Community Leaders*

REPORT FOR DIOCESAN CONVENTION
What B-PEACE has accomplished in 2017

<p>Episcopal Leadership & Educational Opportunities</p>	<ul style="list-style-type: none"> • Encouraged the Episcopal Diocese of Western Massachusetts to become a member of the Massachusetts Coalition to Prevent Gun Violence. Leaders of EDoWM worked with B-PEACE on the gun safety research budget amendment. • Organized a team of 14 Diomass leaders to participate in the Bishops United Against Gun Violence National Conference in Chicago in April. Bishop Gates, youth, clergy, and lay leaders attended “The Unholy Trinity: Racism-Poverty-Gun Violence.” Youth presented a workshop on B-PEACE at the conference.
<p>Family Support & Youth Engagement</p>	<ul style="list-style-type: none"> • Mobilized 10 B-PEACE youth leaders to testify at a hearing of the Judiciary Committee of the state legislature on gun reform legislation concerning silencers and Emergency Restraining Protection Orders (ERPO) for removing guns from disturbed family members. • Ran a campaign, with Cosecha, for Boston Public Schools to become a sanctuary district for immigrant families. Parents and students testified; the city agreed to update the district policies to protect students and train school administrators in new procedures. • Mobilized 250+ Episcopalians for the Mother’s Day Walk for Peace (in the rain!)
<p>Youth Jobs & Workforce Development</p>	<ul style="list-style-type: none"> • B-PEACE teen organizers met with legislators and participated in the Youth Jobs Coalition’s days of lobbying and rally actions to secure \$9M in funding in the MA state budget for youth employment. • B-PEACE teen leaders pressed city officials kept promise to renovate Ramsay Park, our hyper-local model for increasing community safety. In September, ground was broken for construction and the park is on track to re-open in Spring 2018.
<p>Church-School Partnerships</p>	<ul style="list-style-type: none"> • Expanded our model of school partnership with a volunteer run school library, author visits to classrooms, and the largest ever Day of Action on MLK Day (300+ volunteers) • Built a partnership with Boston College to engage college students in the fight to reduce gun violence. • Advanced the AOC network by contributing a chapter to recently published book, <i>All Our Children: The Church’s Call to Address Education Inequity</i>
<p>Gun Law Reform & Public Policy</p>	<ul style="list-style-type: none"> • Intensified participation in the Massachusetts Coalition to Prevent Gun Violence, including leadership on the Strategy and Outreach Committees. • Supported the successful amendment to the 2017 Massachusetts state budget to provide funding for gun safety research; Bishop Gates and other B-PEACE representatives sent letters, visited legislators, and made calls to ensure passage. • Organized clergy, veterans, and medical experts to testify against silencers and in favor of ERPOs (Emergency Restraining Protection Order)

Collaborative Partners:

Report of the Diocesan Loan Committee 2017

Year 2017, the Diocesan Loan Committee approved the following loans:

Congregation	Date of Loan	Rate/Amount/Term of Loan
St. Andrews Church, Ayer	01/05/2017	3.50% \$100,000.00 – 15 years
Trinity Chapel, Shirley	06/23/2017	3.50% \$ 99,840.03 – 15 years
Emmanuel Church, Wakefield	11/01/2017	3.50% \$100,000.00 – 15 years
		TOTAL \$299,840.03

As of December 31, 2017, the outstanding loan portfolio was 2,055,813.47 representing 73 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 16, 2017

The annual meetings of the Officers, Trustees and Directors of the Societies were held jointly on Thursday, March 16, 2017, in Sproat Hall at the Diocese. The Rt. Rev. Gayle E. Harris opened the meeting with prayer at 12:15 pm. Present were: Bishop Harris, the Rev. Robert Edson, the Rev. Marshall Hunt, Tim Hunt, Suzette Phillips, and Gerry Sullivan. Alan West and the Rev. Deborah Woodward, were not in attendance due to illness and Marilyn Swain was unable to attend due to an injury to her knee.

The minutes of the annual meetings of the Societies held on March 10, 2016 were presented by Bishop Gayle Harris. The acceptance of the Minutes was moved, seconded and unanimously voted:

That the minutes of the March 10, 2016 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 Revs. John Balcom, Kendrick Child, James Nelson, John Thomas, and the widow of the Rev. Donald Miller, Anne Miller were noted by Suzette Phillips and a prayer for them and their families was offered by Bishop Harris.

The report of the 2016 distribution of grants for the relief of aged or disabled Episcopal clergy was presented by Bishop Harris, showing \$62,915 in Relief Assistance Grants, and \$57,656.25 in Insurance Preference Grants. It was moved, seconded and unanimously voted:

That the Report of 2016 Distribution of Grants by the Society for the Relief of Aged or Disabled Episcopal Clergy be accepted and placed on file. (Attachment B, Salmon)

The report of the 2016 distribution of grants for the relief of widows, widowers and orphans was presented by Bishop Harris, showing \$26,857 in Relief Assistance Grants, and \$40,300 in Supplemental Insurance Preference Grants. It was moved, seconded and unanimously voted:

That the Report of 2016 Distribution of Grants by the Society for the Relief of Widows, Widowers and Orphans be accepted and placed on file. (Attachment C, Yellow)

Gerry Sullivan presented the treasurer's report for the Society for the Relief of Aged or Disabled Episcopal Clergy. He noted that both Societies are in good shape and did not need to use all of the allotment from the Diocesan budget to balance 2016.

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 2016 be accepted as presented and placed on file. (Attachment D, Salmon)

The Treasurer's report for the Society for the Relief of Widows, Widowers, and Orphans of Clergy was reviewed. It was moved, seconded and unanimously voted:

That the Treasurer's Report for the Society for the Relief of Widows, Widowers, and Orphans of Clergy for 2016 be accepted as presented and placed on file. (Attachment E, Yellow)

Gerry Sullivan then presented the auditor's reports and financial statements prepared by Jay Stott for both societies for the year 2016. It was noted that everything was found to be in good order for both Societies. 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, Salmon)

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, Yellow)

Bishop Harris presented the nominations for Officers and Trustees of the Society for the Relief of Aged or Disabled Episcopal Clergy for 2017. There being no further nominations, it was moved, seconded and unanimously voted:

That nominations be closed.

It was moved, seconded and unanimously voted:

That the following persons be elected Officers and Directors of the Society for the Relief of Aged or Disabled Episcopal Clergy and that one vote be cast by the Secretary for their election.

Officers: The Right Reverend Alan M. Gates, President
 The Right Reverend Gayle E. Harris, Vice President
 Mr. Timothy Hunt, Treasurer
 Mr. Gerry Sullivan, Assistant Treasurer
 The Reverend Deborah M. Woodward, Secretary
 Mrs. Suzette Phillips, Assistant Secretary

Directors: The Reverend Robert Edson
 The Reverend Marshall W. Hunt
 Mrs. Marilyn Swain
 Mr. Alan West

(Attachment H, Salmon)

Bishop Harris presented the nominations for Officers and Trustees of the Society for the Relief of Widows, Widowers and Orphans for 2017. It was moved, seconded and unanimously voted

That the nominations be closed.

It was moved, seconded and unanimously voted:

That the following persons be elected Officers and Trustees of the Society for the Relief of Widows, Widowers and Orphans of Clergy, and that the Secretary cast one vote for their election.

Officers: The Right Reverend Alan M. Gates, President
 The Right Reverend Gayle E. Harris, Vice President
 Mr. Timothy Hunt, Treasurer
 Mr. Gerry Sullivan, Assistant Treasurer
 The Reverend Deborah M. Woodward, Secretary
 Mrs. Suzette Phillips, Assistant Secretary

Trustees The Reverend Robert Edson
 The Reverend Marshall W. Hunt
 Mrs. Marilyn Swain
 Mr. Alan West

(Attachment I, Yellow)

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 2017.

The Right Reverend Gayle E. Harris	Mr. Gerry Sullivan
The Rev. Marshall Hunt	Mr. Timothy Hunt
Mr. Alan West	

It was moved, seconded and unanimously voted:

That the following Officers and Trustees serve on the emergency Finance and Grants Committee for the Society for the Relief of Widows, Widowers and Orphans during 2017.

The Right Reverend Gayle E. Harris	Mr. Gerry Sullivan
The Rev. Marshall Hunt	Mr. Timothy Hunt
Mr. Alan West	

Gerry Sullivan proposed Mr. Jay Stott, Diocesan Parish Audit Report Coordinator continue as the auditor for both Societies. It was moved, seconded and unanimously voted:

That the Society for the Relief of Aged and Disabled Episcopal Clergy appoint Mr. Jay Stott as the auditor for 2017.

And:

That the Society for the Relief of Widows, Widowers and Orphans of Clergy appoint Mr. Jay Stott as the auditor for 2017.

Bishop Harris and Suzette Phillips presented the proposed 2017 Relief Assistance and Insurance Preference Grants. The bishop explained that the new grant for Harold Bronk was because last summer he had been diagnosed with prostate cancer that has metastasized. The bishop also requested that two other relief grants be increased by \$1000 each due to difficult financial circumstances. It was moved, seconded and unanimously voted:

That the proposed 2017 Relief Grants and Supplemental Health Insurance Preference Grants for the Society for the Relief of Aged or Disabled Clergy as outlined in Bishop Harris's Memorandum to the Society with the proposed increases be accepted.

(Attachment J, Salmon)

It was moved, seconded and unanimously voted:

That the proposed 2017 Relief Grants and Supplemental Health Insurance Preference Grants for the Society for the Relief of Widows, Widowers and Orphans of Clergy as outlined in Bishop Harris's Memorandum to the Society be accepted. (Attachment K, Yellow)

Gerry Sullivan reviewed the 2017 budget for the Society for the Relief of Aged and Disabled Episcopal Clergy. It was moved, seconded and unanimously voted:

That the proposed 2017 budget for the Society for the Relief of Aged and Disabled Episcopal Clergy with the additional increases be approved. (Attachment D, Salmon)

The budget for the Society for the Relief of Widows, Widowers and Orphans of Clergy was presented. It was moved, seconded and unanimously voted:

That the 2017 budget for the Society for the Relief of Widows, Widowers and Orphans of Clergy be approved. (Attachment E, Yellow)

Other Discussions/Reports:

- Statistical Reports (Attachment L, White)

The board reviewed the Grants History for both Societies. Suzette Phillips noted that the statistical report for 2017 indicates that over 57% (20 of the 35 clergy recipients) are aged 80-92 and over 63% (22 of the 35 widow recipients) are aged 80-100. This year the report also included data regarding possible future clergy eligible for grants. There were 6 new retirees in 2016; no new grantees.

- Suzette also informed the board that the Society for the Relief of Aged and Disabled Clergy received an anonymous donation of \$300. We approved adding this gift to the endowment.
- We discussed Bishop Harris suggestion to consider a later date for the Annual meetings to avoid any late winter weather conditions, and House of Bishops meetings held during March. We set April 05, 2018 at noon as the Annual Meeting date.

There being no further business, the meeting was closed with a prayer by the Rev. Marshall Hunt and adjourned at 1:45 pm.

Respectfully submitted,

Suzette Phillips, Assistant Secretary

2017 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 2017 the Society was providing quarterly assistance to 20 beneficiaries and, with the help of area parishes, had made one-time grants to help another 11 individuals who were in need of short-term financial assistance. At the end of the year we had distributed over \$150,000 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 11 parishes were able to help many individuals or families facing the inability to pay for their most basic living necessities.

Members are nominated and elected at the Society's Annual Meeting held annually on the first Tuesday in June. The Society currently has approximately 65 members. Each member must be a member of the Episcopal Church and be a resident of the Commonwealth of Massachusetts. We are actively seeking new members.

The Society strongly encourages parish priests to let us know if there are individuals in their congregation who might be in need of financial help, either on a one-time or quarterly basis. If you are interested in learning more about the Society, you are invited to contact our administrator, Nina Faragher, at Suite 600, Ten Post Office Square, Boston, Massachusetts 02109, 617-426-6051, or boston.episcopal.1724@gmail.com.

Officers:

The Rt. Rev. Gayle Elizabeth Harris, Chairperson
The Rev. Thomas B. Kennedy, President
Amanda McGrady Morrison, Secretary
Charles C.J. Platt, Treasurer

Trustees: Officers and the Following

Alexander T. Bok
Liza M. Connelly
Robert S. Hurlbut, Jr.
David S. Lee
Pamela Larson Mathews
Sarah W. Wilcox
The Rev. Robert G. Windsor



EPISCOPAL CITY MISSION
2017 Annual Report

A photograph of a church interior, viewed from the back of the sanctuary. The ceiling features a large, ornate dome with a grid pattern. The walls are light-colored with classical architectural details. A congregation is seated in rows of pews, facing a central altar area. Two large screens on either side of the altar display text. The entire image has a purple tint.

”

If we pause long enough ... we may be able to see that the revolutionary river that brought us this far just might be the only thing that could possibly carry us to a place where we all belong.

-Michelle Alexander

REPORT

From Leadership

Awaken Love. Do Justice.

The words, 'we are living in unprecedented times,' are a common response to the heightened attacks on vulnerable communities. However, racism, xenophobia, and the marginalization of the poor are not new phenomena - they are woven into the fabric of our country and our faith traditions. The current administration has unleashed and emboldened these forces of oppression in alarming ways. As a response, progressive non-profit organizations, faith communities, and grassroots movements are developing creative ways to persist in our pursuit of justice and dignity for all.

ECM has spent the last two years working alongside you, our members, to consider how we respond strategically in ways that follow Jesus's example to build the beloved community and to resist the forces of oppression.

The first-fruits of our efforts include: deepening our partnership with the two Episcopal Dioceses of Massachusetts to more powerfully respond to injustice; beginning an organizing initiative on the South Coast in partnership with pro-immigrant organizations and congregations; establishing ECM's Immigrant Justice Bond Fund; launching a new prophetic leadership development curriculum through the Praxis Community and our Faith-Rooted Organizing Workshop; restructuring our Burgess Urban Fund grant program to better serve our grassroots partners; and forming our Relational Action Network that engaged hundreds of people in actions for racial and economic justice through advocacy, accompaniment, and prophetic voice.

We have been profoundly reminded that while oppression has always existed, more so has the steadfast transforming love of God. God's love, a love that pulls us forward towards an experience of deeper liberation, is alive and well in our grassroots partners and faith communities across the Commonwealth. Our partners show us how the Holy Spirit will continue to pursue liberation through this transforming love that inspires us to do justice and forges what Michelle Alexander refers to as the "revolutionary river," a river that paved the way for the abolition of slavery, women's suffrage, minimum-wage laws, the Civil Rights Acts, and gay marriage.

We are grateful for your partnership over the past year and pray that you would join us as we continue to discern our participation in the Spirit's ongoing work of awakening love and doing justice.

Develop strategic partnerships with key faith-rooted and grassroots organizations

Engage individuals, Christian communities and faith-rooted networks in opportunities for strategic involvement in justice and movement-based action.

Expand the Morville House financial model by leveraging our capital for mission-related impact and expand our donor base.

Develop a more integrated funding strategy that takes into account organizational impact, alliance building and innovation. Leverage strategy and funding partnerships with local progressive funders for greater collective impact.



MISSION

ECM builds relationships and collective power across the Commonwealth of Massachusetts for racial and economic justice as the expression of God's transforming love. We do this by developing, convening, mobilizing, and funding prophetic leaders in Episcopal communities, grassroots organizations, and faith-rooted organizations.

focused on racial and economic justice that will inform our engagement strategy

Engage parishes and individuals in diverse program models for prophetic leadership grounded in the experience of the Leadership Development Initiative (LDI).

Partner with our grassroots and faith-rooted partners to design learning communities that foster transformative relational engagement across division.

Reclaim a prayerful and prophetic Christian narrative that is rooted in scripture, tradition, and the stories of individuals and communities who are prophetic leaders



STRATEGY

Through these roles we will express God's transforming love throughout the commonwealth of MA

2018 IMPACT

Mobilize, Develop, Fund

Mobilize: People of Faith Showing Up

IMMIGRATION

ECM has played an active organizing role in gathering people to protest the attacks on our immigrant neighbors in Massachusetts and to demand that the state-legislature pass four key protections for immigrant families in Massachusetts. Although the protections did not pass this year, ECM successfully turned people out to multiple actions and demonstrated reliable partnership in the immigrant justice community alongside our partners at ECCO (Essex County Community Organization), UUMass Action, Centro Presente, and MIRA (Massachusetts Immigrant and Refugee Advocacy Coalition).

HIGHLIGHTS

November 8th, 2017 - ECM stood with our partners from Centro Presente and other local organizations at the State House to demonstrate support for our neighbors whose Temporary Protected Status (TPS) was threatened.

January 10th, 2018 - ECM hosted a "Holy Non-Collaborators" Coffee Hour as an opportunity for communities of faith to learn more about ways of being an effective ally to our immigrant neighbors. ECM then took this constituency of clergy and lay leaders to attend Centro Presente's TPS Rally at City Hall in Boston.



July 10, 2018 - ECM Staff partnered with ECCO to lead a vigil for over 150 protesters at the State House to pressure the State House to pass protections for immigrant families.



July 24, 2018 - ECM, with Bishop Alan Gates, Bishop Bud Cederholm, and Dean Amy McCreath along with 20 other Episcopal Clergy and Lay Leaders, joined our partners to lament that legislators failure to act in favor of immigrant families at the State House. Bishop Alan Gates was one of the featured speakers at the rally.

IMMIGRANT LEGAL FUND:

In the spring of 2017, Episcopal City Mission was asked to accompany an undocumented leader from a partner organization at their yearly check-in with ICE. Through this action, we recognized a clear need for financial support to help cover bond costs and other expenses for undocumented people. ECM launched the Immigrant Justice Bond Fund to connect the resources of our faith communities with members of grassroots communities who are at risk.

This year, ECM has worked with the Boston Immigrant Justice Accompaniment Network (BIJAN), UU Mass Action, and Massachusetts Communities Action Network (MCAN) to collect and disburse more than \$100,000 for bonds and legal fees.



Currently, ECM is partnering with Chelsea Collaborative and Essex County Community Organization (ECCO) to launch a bond fund in Chelsea and Lynn, two communities whose residents are targeted by Immigration and Customs Enforcement (ICE).

GUN VIOLENCE

Mass shootings in schools and other public places are just one way that gun violence has a negative impact on the lives of young people (and adults).



ECM is grateful to the courageous leadership of the students of Marjory Stoneman Douglas High School in Parkland, FL for putting gun violence at the forefront of our attention.

Following the leadership of young people from Boston, Springfield, Holyoke, Worcester, Andover, and Brookline, ECM joined a movement of community leaders including the Pioneer Valley Project and St. Stephen's Episcopal Church, South End who peacefully represented "Stand for Our Lives" outside Smith & Wesson in Springfield, MA and outside the Statehouse on March 14th. ECM also supported Episcopal youth and adults to join the movement of young people at the March for Our Lives on Saturday, March 24th in Boston and in Washington, D.C.

Develop: Cultivating the Knowledge, Skills, and Courage Necessary for Action

PRAXIS

The Praxis program uses a circle model where 5-7 leaders meet monthly to study a curriculum that supports participants to further develop courage and capacity to build liberating community, act for racial justice, and develop strategies for the integration of spirituality and justice.



ECM's Praxis program exists to support faith and justice leaders to integrate their spiritual lives with their work to change the world.

HIGHLIGHTS

ECM convened a committee of faith and justice leaders to write this year's Praxis curriculum: *Faith as Social Movement*

50 leaders are currently involved in 8 Praxis circles

Praxis Circles have supported their members to take local action from a place of spiritual presence including our North Carolina Circle focusing on the Moral Mondays Movement and our Alabama Circle focusing on racial reconciliation

Praxis is developing new strategies to reach a wider audience, including local grassroots leaders across the Commonwealth of Massachusetts



FAITH-ROOTED ORGANIZING (ECM'S INTRODUCTION WORKSHOP):

ECM's Faith-Rooted Organizing (FRO) workshop is a gateway for faith leaders to get involved in the social justice efforts of ECM and our partners. The workshop supports leaders to act from a spiritually and strategically grounded place. On September 15th, we held our first FRO training.

HIGHLIGHTS

More than 60 people attended the training from Episcopal communities, Life Together, and grassroots organizations.

More than half of the participants committed to taking further action with ECM.

The design of a new curriculum focused on the connections between Jesus and social movements, community organizing strategies, the necessary relationship between prayer and social action, storytelling and relationship building skills, mapping power dynamics, and taking strategic action.

Three presenters and nine facilitators were trained to lead the workshop.

Fund: Strengthening Community-Led Work for Justice



In 2017, ECM presented \$386,496 in grants to 28 organizations and 8 parishes.

ECM has been working diligently to build relationships between all of our grantees who are working for justice in communities across the Commonwealth of Massachusetts. This was the third year that ECM brought together Parish Partnership, Diocesan, and Burgess Urban Fund grant recipients to the annual award luncheon, lifting up the role faith-rooted communities and grassroots organizations have in creating whole, just, and equitable communities in Massachusetts. Wider Community Partnership grants were awarded in the spring.

FALL GRANTEE GATHERING, 2017

On Saturday, November 11th at Christ Church, Needham, over 150 organizers from across New England came together for our seventh Annual Grantee Gathering, hosted in collaboration with the Haymarket People's Fund, The Hyams Foundation, the Lenny Zakim Fund and Third Sector New England's Inclusion Initiative. The Annual Grantee Gathering provides an opportunity for all of ECM's grantees to join other justice organizers across New England to learn from one another, share successes, offer support and solidarity, and brainstorm ways to build movements for justice.

2017 GRANTEES

BURGESS URBAN FUND

- *Acedone*
- *Agencia ALPHA*
- *Asian American Resource Workshop*
- *Boston Tenant Coalition*
- *CEDC of SE MA*
- *Chinatown Community Land Trust*
- *Coalition for Social Justice*
- *Dominican Development Center*
- *Dudley Neighbors Inc.*
- *ECCO*
- *Gedakina*
- *Lynn United for Change Empowerment Project*
- *Lynn Worker Center*
- *Merrimack Valley Project*
- *MetroWest Worker Center*
- *Muslim Justice League*
- *Neighbor to Neighbor*
- *Southwest Boston Community Dev. Corp.*
- *THRIVE*
- *Women Encouraging Empowerment*
- *Youth Justice and Power Union*



PARISH PARTNERSHIP GRANT PROGRAM

- *common cathedral*
- *Fourth Presbyterian, South Boston*
- *Grace Chapel, Brockton*
- *MANNA*
- *Nuevo Amanecer*
- *St. Mary's, Dorchester*
- *St. Stephen's, Lynn*
- *St. Stephen's Youth Programs, South End*



WIDER COMMUNITY PARTNERSHIP GRANT PROGRAM

- *Boston Faith and Justice Network*
- *Interfaith Worker Justice*
- *Massachusetts Council of Churches*
- *Partakers*
- *UU Mass Action*



DIOCESAN GRANT PROGRAM

- *Life Together*
- *Barbara C. Harris Camp and Conference Center*



2018 Annual Celebration

Over 375 people and 55 Episcopal Communities attended ECM's Annual Celebration on June 12, 2018. The event's keynote speaker, Christena Cleveland, a social psychologist, public theologian, author, and professor, drew our attention to the Prophetic Hope that can be found by listening to the soul of our communities.

AWARD RECIPIENTS AT THE EVENT

The Bishop Barbara C. Harris Award: The Reverend Dorothea Littlepage - Executive Director of the Dorchester-Roxbury Mission Hub.

The Robert W. Tobin Award: Alexie M. Torres - Executive Director of Access Strategies, Cambridge, MA

The Bishop M. Thomas Shaw, SSJE: The Episcopal Parish Of St. Paul, Newton Highlands for their leadership through the Sanctuary Movement.

The event concluded with a call to act in solidarity with immigrant families through donating to ECM's Immigrant Legal Fund or signing letters that urged legislators to pass the Safe Communities Act.



Over 30% of attendees acted - we raised more than \$3,000 and collected 100 letters for representatives.

We are grateful to the team of people who helped make the event such a success. Save the date for our 2019 Annual Celebration -- June 11, 2019!

FINANCES

Report from the Treasurer

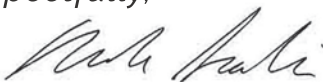
As reflected on the attached Statement of Financial Position, Episcopal City Mission's total assets stood at \$28,115,699 as of December 31, 2017, with investment assets (exclusive of ECM's holding in the Diocesan Investment Trust Fossil Fuel Free Fund) at a market value of \$21,169,885. The investment figure reflects an increase of 13.85% relative to the 2016 year-end market value of ECM's investment portfolio (exclusive of its investment in the DIT Fund). In addition to the assets that ECM invests through Trillium Asset Management, ECM has invested in the Fossil Fuel Free Fund established through the Trustees of Donations. As of December 31, 2017, the value of this holding was \$131,650. For more detail, please review the preliminary financial reports accompanying this report.

Throughout this year, ECM has worked diligently to give roots to a new strategic vision for the organization, which seeks to bring forward a courageous, faith-rooted, and prophetic course that helps to grow communities and to bring about more just, whole and equitable vision of our world. As part of our new strategic plan, ECM has explored how we can use our voice as corporate shareholders to speak for justice and equity in the economic, as well as political, sphere. In line with our values as an organization, this fall, Arrington Chambliss, Dr. Margaret Post, and other members of the Board co-authored an article with our investment advisor, Trillium Asset Management, entitled "Faith, the Economy, and the Immigration Crisis," which asked our political and economic leaders to develop a humane and just immigration policy, and notes that doing so is consistent with a growing economy as well as broadly felt financial benefits. In addition, ECM will co-sponsor two shareholder initiatives as follows:

*A resolution putting forth a workforce diversity proposal with Analog Devices; and
A resolution requesting that Middleby Corporation issue a report describing the company's environmental, social, and governance (ESG) policies.*

As we move towards 2019, ECM seeks to use its resources to bring forward a Prophetic Voice that carries a message of God's transforming love into both our communities and our economy. The challenges faced when asking economic leaders to balance financial outcomes with the needs of our communities are large. ECM, however, deeply believes that challenging corporations to develop just, responsible and sustainable governance practices will not only give rise to a more just world, but also bring about the greatest economic growth for all. The needs of our communities need not, and should not be seen as, in opposition to positive economic returns.

Respectfully,



Andree Saulnier, Treasurer

STATEMENT OF ACTIVITIES

For The Year Ended December 31, 2017-*

For The Year Ended December 31, 2016

Income	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<i>Interest and dividends, net of fees</i>	\$279,887	\$81,587	-	\$361,474	\$244,734	\$66,547	-	\$311,281
<i>Contributions from individuals, parishes & organizations</i>	\$94,112	\$7,561	-	\$101,673	\$83,576	-	-	\$83,576
<i>Diocesan grants</i>	-	\$30,000	-	\$30,000	-	\$30,000	-	\$30,000
<i>Gift from Episcopal Church Women of the Diocese of Massachusetts (ECW)</i>	-	-	-	\$0	-	-	\$407,127	\$407,127
<i>Other income</i>	\$160,828	-	-	\$160,828	\$10,208	\$793	-	\$11,001
<i>Net assets released from restrictions</i>	-	-	-	\$0	\$152,039	(\$152,039)	-	-
Total operating income	\$534,827	\$119,148	\$0	\$653,975	\$490,557	(\$54,699)	\$407,127	\$842,985
Expenses								
<i>Community and Economic Development</i>	\$462,605	-	-	\$462,605	\$363,102	-	-	\$363,102
<i>Parish and Diocesan Programs</i>	\$422,460	-	-	\$422,460	\$267,339	-	-	\$267,339
<i>Housing Related Programs</i>	\$73,156	-	-	\$73,156	\$58,656	-	-	\$58,656
<i>Public Policy</i>	\$67,000	-	-	\$67,000	\$97,067	-	-	\$97,067
<i>Constituent Education</i>	\$144,918	-	-	\$144,918	\$118,170	-	-	\$118,170
<i>Administration</i>	\$328,896	-	-	\$328,896	\$399,595	-	-	\$399,595
Total expenses	\$1,499,035	\$0	\$0	\$1,499,035	\$1,303,929	-	-	\$1,303,929
<i>Change in net assets from operations</i>	(\$964,208)	\$119,148	\$0	(\$845,060)	(\$813,372)	(\$54,699)	\$407,127	(\$460,944)
Other Income								
<i>Ground lease fee and accrued interest</i>	\$193,935	-	-	\$193,935	\$193,935	-	-	\$193,935
<i>Accrued interest on mortgage</i>	\$176,363	-	-	\$176,363	\$221,726	-	-	\$221,726
<i>Other income</i>	-	-	-	\$0	-	\$100,781	-	\$100,781
<i>Realized gain (loss) on sale of investments</i>	\$574,998	\$187,743	-	\$762,741	\$474,639	\$142,884	-	\$617,523
<i>Increase (decrease) in unrealized gain</i>	\$1,198,158	\$388,043	-	\$1,586,201	(\$8,585)	\$1,568	-	(\$7,017)
Total non-operating income	\$2,143,454	\$575,786	\$0	\$2,719,240	\$881,715	\$245,233	\$0	\$1,126,948
Change in net assets	\$1,179,246	\$694,934	\$0	\$1,874,180	\$68,343	\$190,534	\$407,127	\$666,004

STATEMENT OF FINANCIAL POSITION

Assets

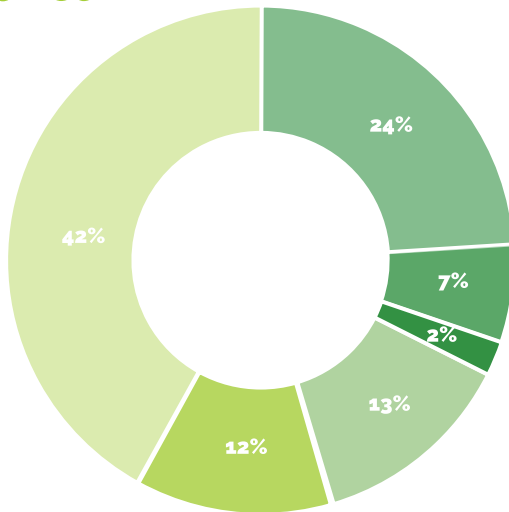
<i>Investments at market value at year end</i>	\$21,301,535	\$18,707,404
<i>Other assets</i>	\$6,814,164	\$7,460,255
Total assets	\$28,115,699	\$26,167,659

Liabilities and Net Assets

<i>Liabilities</i>	\$237,896	\$144,980
<i>Net assets:</i>		
<i>Unrestricted</i>	\$22,705,756	\$21,433,675
<i>Temporarily restricted</i>	\$3,010,253	\$2,457,210
<i>Permanently restricted</i>	\$2,161,794	\$2,161,794
<i>Total net assets</i>	\$27,877,803	\$26,022,679
Total liabilities & net assets	\$28,115,699	\$26,167,659

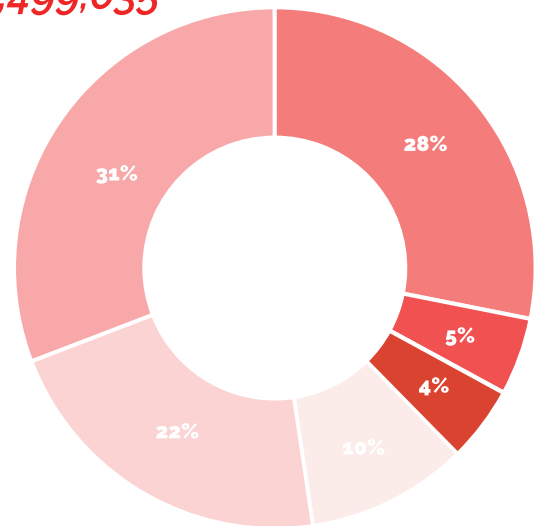
OPERATING INCOME

\$1,499,035



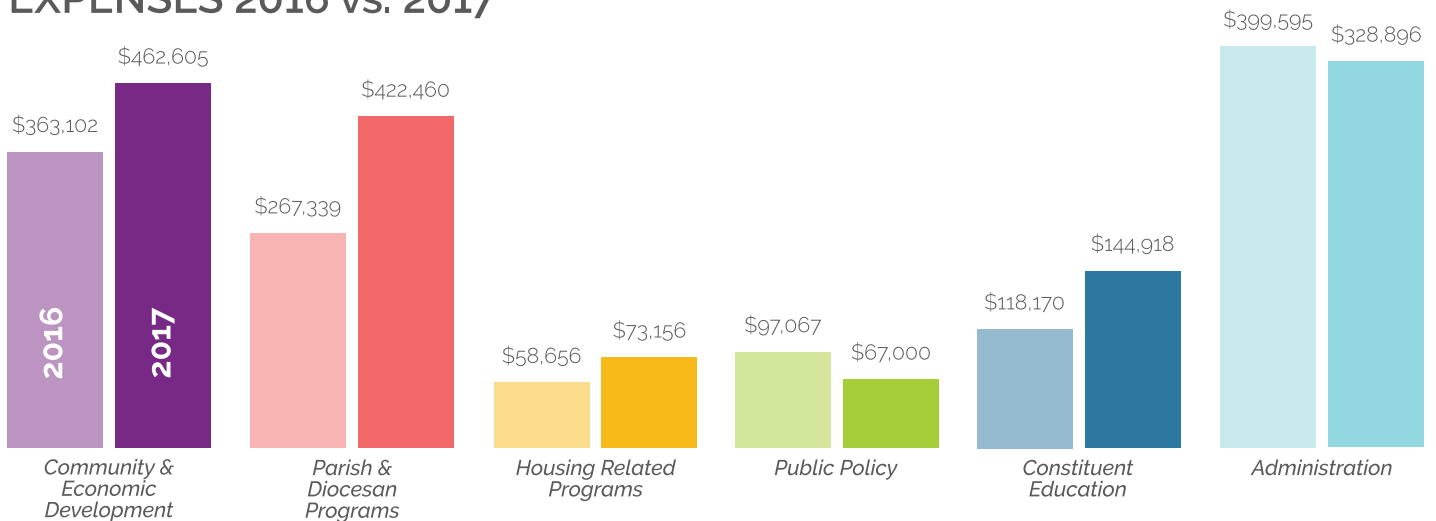
EXPENSES

\$1,499,035



● Interest and dividends, net of fees	\$361,474	● Community and Economic Development	\$462,605
● Contributions from individuals, parishes & organizations	\$101,673	● Parish and Diocesan Programs	\$422,460
● Diocesan grants	\$30,000	● Housing Related Programs	\$73,156
● Ground lease fee and accrued interest	\$193,935	● Public Policy	\$67,000
● Accrued interest on mortgage	\$176,363	● Constituent Education	\$144,918
● Other revenue	\$635,590	● Administration	\$328,896

EXPENSES 2016 vs. 2017



TOTAL LIABILITIES & NET ASSETS

2016
2017
\$26,167,659
\$28,115,699

BOARD

President, *The Rt. Rev. Alan M. Gates*
Vice President, *The Rt. Rev. Gayle E. Harris*
Chair, *The Rev. Tim Crellin*
Vice Chair, *The Rev. Dr. Lisa R. Fortuna*
Secretary, *Dr. Margaret A. Post*
Treasurer, *Andree Saulnier*
Erin Alarcon
Ella Auchincloss
The Rev. Jacqueline Clark
The Rev. Marisa Egerstrom
William Haynsworth
The Rev. Edwin D. Johnson
Dr. Alexandra Piñeros Shields
Louise Gant
The Rev. Moses O. Sowale
The Rev. Matthew Stewart

STAFF

Executive Director, *The Rev. Arrington Chambliss*
Yani Burgos
Dax Crocker
Natalie E. Finstad
Dan Gelbtuch
Carol Koskelowski
Lily Luo
Carly Margolis
The Reverend Dr. Michael P Melendez, OSF
Ellen Sheehy
Jocelin Thomas

2017 Extra-Parochial Reports

Abeyaratne, Keshini Anoma
Allen, David Eastman SSJE
Almquist, Curtis G. SSJE
Anderson, Juliana C.
Angelica, David M.
Appleyard, Robert B.
Armstrong, Richard S.
Bagwell, Robert R.M.
Barney, David M.
Bell, Cynthia
Benshoff, Bruce L.
Berman, Elizabeth S.
Billingsley, Michael
Bonsey, Steven
Brakeman, Lyn G.
Bresnahan, Paul B.
Brome, Henderson L.
Buquor, Anthony F.
Burr, Whitney H.
Carpenter, Judith P.
Chapman, George M.
Chapman, James
Clark, Judith F.
Coburn, Ann S.
Colburn, Suzanne F.
Conant, Louise R.
Corrigan, Michael
Cramer, Roger W.
Crandall, John D.
d'Alcaravela, Joao A.A.
David, Charles L.
DeYoung, Lily A.
Dickson, E. Robert
Dolnikowski, Edie
Donohue, Mary Jane
Ebens, Richard F.
Eddy, William W.
Edmunds, Robert D.
Evans, Katharine C.
Fornaro, Francis
Forrest, E. Louise
Franklin, Ann H.

Fregeau, Stephen A.
Garbarino, Harold W.
Gardner, Anne E.
Gay, Judith S.
Geissler-O'Neil, Susan L.
George, Cathy H.
Gordon, Billie Mae
Goshgarian, Martin J.
Hall, Addison C.
Hartwell, Michael
Hefling, Charles C.
Helferty, Scott H.
Jackson, Robert S.
Jaikes, Donald W.
Jarvis, F. Washington
Jerauld, Philip E.
Johnston, David K.
Kennedy, Thomas B.
Kienzle, Edward C.
King, Allan B.
Kinney, Elise
Kondrath, William M.
Lloyd, Margaret E.
Loring, Richard T.
Mann, Louise
Mathews, Ranjit K.
McCall, Terry
McCue, Allan Homer
McGinn, John E.
McGrady, Jacqueline
McLachlan, Devin S.
Meyer, Wendel W.
Milholland, Nancy E.
Minton, Anne M.
Ntagengwa, Jean Baptiste
Outman-Conant, Robert E.
Parini, Barbara D.
Parker, Roy E.
Parnell, William C.
Parthum, Charles F.
Partridge, Cameron E.
Payne, Richard L.

2017 Extra-Parochial Reports

Povey, J. Michael
Prentice, David
Randall, Sarah A. SSM
Richmond, Susan O.
Robinson, Michael
Rodman, Samuel S.
Rofinot, Laurie
Russell, Carlton T.
Ryan, Adele Marie SSM
Shepherd, Nancy H.
Shepherd, Thomas C.
Sherwood, Robert L.
Shirley, Michael O.
Simeone, Richard J.
Smith, Claude A.
Smith, Gail S.
Smith H. Mark
Smith, John F.
Smith-Moran, Barbara
Stair, Adrian
Stuart, Judith L.
Sullivan, Maryalice
Townsend, John T.
Tristram, Geoffrey R. SSJE
Voysey, Stephen D.
Vryhof, David B. SSJE
Weiss, James M.
Welch, George Truman
Whitbeck, Bailey O.
Whittaker, Christine R.
Windsor, Robert G.
Wood, Priscilla
Woods, J.C.
Ximenes-Engels, jimichael
Zalneraitis, Herbert B.
Zeigler, Luther

CLERGY RECORDS
2017

A. ORDINATIONS TO THE TRANSITIONAL DIACONATE

June 3 Daniel Bell
Emily Garcia
Duncan Hilton
Patrick LaFortune
Amanda March
Amy Whitcomb Slemmer
in the Cathedral Church of St. Paul, Boston by Bishop Gayle E. Harris

B. ORDINATIONS TO THE VOCATIONAL DIACONATE

N/A

C. ORDINATIONS TO THE PRIESTHOOD

January 19 Marisa Egerstrom in St. Stephen's, Boston by Bishop Alan M. Gates
January 22 Christopher Whiteman in Groton School, Groton by Bishop Alan M. Gates
March 31 Isaac Everett in Trinity Church, Boston by Bishop Gayle E. Harris
December 9 Emily Garcia in Church of the Redeemer, Chestnut Hill by Bishop Alan M. Gates

D. RECEIVED FROM OTHER DIOCESES

January 17 Harry Jean-Jacques from Haiti
March 28 Elizabeth Grundy from California
June 6 Rachel Wildman from New York
August 28 Eletha Buote-Greig from Rhode Island
September 12 Catherine Healy from Oregon
October 19 Nancy Hagner from New Jersey
November 8 Jennifer Beal from Los Angeles

E. TRANSFERRED TO OTHER DIOCESES

January 17 Cameron Partridge to California
March 9 Roy Tripp to South Carolina
March 21 Matthew Lindeman to Connecticut
March 29 Noah Evans to Pittsburgh
March 29 Sara Irwin to Pittsburgh
June 1 Kevin Olds to Connecticut
June 20 Paula Toland to Western Massachusetts
July 26 Charles Wynder to Washington
July 27 Ranjit Mathews to Connecticut
August 17 Kim Hardy to Vermont
September 12 Christian Brocato to Western Michigan
October 31 Richard Bardusch to Virginia
November 1 Tony Buquor to South Dakota
December 7 Sammy Wood to Tennessee

F. DEATHS

January 3	John M. Balcom
March 22	Karen Bettacchi
April 5	Frank D. Baker
April 7	Warren G. Freeman
April 13	Donald T. Isaac
May 20	Harold R. Bronk, Jr.
July 27	Robert A. Mackie
August 12	Alexander Daley
August 29	Kathryn Ann Piccard
October 9	Margaret B. Gunness
November 17	W. E. Douglas Bond
December 13	Alden Besse

G. RETIREMENTS

January 1	Patricia Barrett
January 1	Katharine Black
January 1	Elizabeth Wheatley-Dyson
January 1	James LaMacchia
February 1	Wanda Pizzonia
March 1	Margot Critchfield
March 1	John Streit
October 1	Sam Lloyd
December 1	Judith Davis

Postulants and Candidates

as of May 21, 2017

Mr. Stephen M. Armandt

38 Boylston St Apt 1L
Boston, MA 02130
H: (617) 943-8355
O:

Sponsoring Parish:

Church of the Advent, Boston
E-mail: stevearmandt@gmail.com

Mr. Daniel Bell

51 Grant St
Somerville, MA 02145
H: (631) 807-6725
O: (781) 599-4220

Sponsoring Parish:

St. Stephen's Memorial Church, Lynn
E-mail: dpb3022@gmail.com

Ms. Maria Benjamin

1700 Le Roy Ave #6
Berkeley, CA 94709
H: (203) 814-8804
O:

Sponsoring Parish:

Grace Church, Medford
E-mail: mia.benj@gmail.com

Dr. Michael S. Bickford

114 Newtonville Ave
Newton, MA 02458
H: (617) 610-3414
O: (508) 721-1219

Sponsoring Parish:

Church of the Advent, Boston
E-mail: mbickford@mac.com

Ms. Sarah K. Brock

75 Euston Rd #3
Brighton, MA 02135
H: (585) 217-7505
O:

Sponsoring Parish:

All Saints' Church, Attleboro
E-mail: sarahkbrock@gmail.com

Mr. Lawrence J. Civalo

Episcopal Diocese of Mass.
138 Tremont St
Boston, MA 02111
H: (617) 451-0803
O: (617) 482-4826 X: 465

Sponsoring Parish:

Church of the Advent, Boston
E-mail: lcivalo@diomass.org

Ms. Susan Correira

1683 S Main St Apt 1E
Fall River, MA 02721
H: (508) 916-7552
O:

Sponsoring Parish:

Church of the Holy Spirit, Fall River
E-mail: miss_sue_64@yahoo.com

Dr. Harry W. Easterly III

PO Box 188
Marion, MA 02738
H: (508) 277-5069
O:

Sponsoring Parish:

St. Gabriel's Church, Marion
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Mr. Atem Aruei Yak

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Sponsoring Parish:

Grace Church, Everett

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**Episcopal Visitations
2016 - 2017 Liturgical Year**

Church	Date	Bishop
Andover, Christ Church	1/8/2017	Harris, G.
Arlington, St. John's Church	2/12/2017	Gates
Ayer, St. Andrew's Church	4/23/2017	Gates
Beverly, St. Peter's Church	9/17/2017	Gates
Boston, Emmanuel Church	2/26/2017	Harris, G.
Boston, St. Stephen's Church	6/11/2017	Harris, G.
Bridgewater, Trinity Church	10/15/2017	Harris, G.
Brookline, Church of Our Saviour	1/29/2017	Gates
Brookline, All Saints Parish	5/7/2017	Gates
Burlington, St. Mark's Church	1/22/2017	Gates
Cambridge, Christ Church	3/19/2017	Harris, G.
Cambridge, St. James's Church	5/7/2017	Harris, G.
Chelmsford, All Saints' Church	11/5/2017	Harris, G.
Chelsea, St. Luke's-San Lucas Church	6/18/2017	Harris, G.
Cohasset, St. Stephen's Church	12/11/2016	Gates
Dartmouth, St. Aidan's Chapel	7/23/2017	Gates
Edgartown, St. Andrew's Church	8/20/2017	Gates
Everett, Grace Church	11/19/2017	Cederholm
Fall River, St. Luke's Church	3/26/2017	Gates
Fall River, Church of the Holy Spirit	9/10/2017	Harris, G.
Falmouth, St. Barnabas's Church	9/17/2017	Cederholm
Groveland, St. James's Church	3/26/2017	Harris, G.
Hanover, St. Andrew's Church	12/18/2016	Gates
Hingham, Parish of St. John the Evangelist	5/21/2017	Harris, G.
Holliston, St. Michael's Church	3/5/2017	Harris, G.
Hopkinton, St. Paul's Church	10/29/2017	Gates
Hudson, St. Luke's Church	5/21/2017	Gates
Jamaica Plain, St. John's Church	3/19/2017	Cederholm
Lawrence, Grace Church	5/14/2017	Harris, G.
Lincoln, St. Anne's in-the-Fields Church	6/11/2017	Gates
Lynnfield, St. Paul's Church	12/11/2016	Cederholm
Manchester, Emmanuel Chapel	8/20/2017	Harris, G.
Marblehead, St. Michael's Church	6/4/2017	Harris, G.
Marion, St. Gabriel's Church	6/4/2017	Gates

Church	Date	Bishop
Marshfield, Trinity Church	5/7/2017	Cederholm
Mattapan, Church of the Holy Spirit	2/26/2017	Gates
Medway, Christ Church	4/15/2017	Harris, G.
Melrose, Trinity Parish	2/5/2017	Gates
Middleborough, Church of Our Saviour	12/3/2017	Gates
Natick, St. Paul's Church	5/7/2017	Gates
Needham, Christ Church	1/15/2017	Harris, G.
New Bedford, Grace Church	10/22/2017	Harris, G.
Newburyport, St. Paul's Church	6/25/2017	Gates
Newton, Grace Church	10/8/2017	Harris, G.
Newton Centre, Trinity Church	4/9/2017	Harris, G.
North Andover, St. Paul's Church	3/19/2017	Gates
Norwood, Grace Church	4/2/2017	Gates
Provincetown, Church of St. Mary of the Harbor	9/10/2017	Gates
Quincy, Christ Church	3/5/2017	Gates
Rockport, St. Mary's Church	10/8/2017	Gates
Roxbury, St. Cyprian's Church	10/29/2017	Harris, G.
Sandwich, St. John's Church	6/25/2017	Harris, G.
Scituate, St. Luke's Church	4/2/2017	Cederholm
Sharon, St. John's Church	12/4/2016	Harris, G.
Southborough, St. Mark's Church	11/12/2017	Cederholm
Swansea, Christ Church	4/30/2017	Harris, G.
Vineyard Haven, Grace Church	12/11/2016	Harris, G.
Vineyard Haven, Grace Church	12/11/2016	Harris, G.
West Roxbury, Emmanuel Church	9/17/2017	Harris, G.
Whitman, All Saints' Church	6/4/2017	Cederholm
Winchester, Parish of the Epiphany	4/2/2017	Harris, G.

**Episcopal Official Acts
2016 - 2017 Liturgical Year**

Church	Date	Bishop or Rep	Action	
Amesbury, St. James's Church	6/17/2017	Harris, G.	Confirmation	2C Cathedral Church of St. Paul
Amesbury, St. James's Church	10/28/2017	Harris, G.	Deanery Confirmation	1 Confirmed at Christ Church in Andover
Andover, Christ Church	10/28/2017	Gates	Deanery Confirmation	17 Confirmed, 3 Received at Christ Church, Andover
Ayer, St. Andrew's Church	4/23/2017	Gates	Visitation	2 Baptized, 2 Confirmed, 3 Received, 1 Reaffirmed
Bedford, St. Paul's Church	6/17/2017	Harris, G.	Confirmation	7C; 1R at Cathedral Church of St. Paul
Bedford, St. Paul's Church	10/21/2017	Cederholm	Deanery Confirmation	1 Received at The Cathedral Church of St. Paul, Boston
Belmont, All Saints' Church	1/28/2017	Gates	Deanery Confirmation	1 Received at The Cathedral in Boston
Belmont, All Saints' Church	6/17/2017	Harris, G.	Deanery Confirmation	3C at Cathedral, Boston
Beverly, St. Peter's Church	6/17/2017	Harris, G.	Deanery Confirmation	5 C
Beverly Farms, St. John's Church	6/17/2017	Harris, G.	Confirmation	3C at Cathedral Church of St. Paul
Beverly Farms, St. John's Church	9/16/2017	Gates	Deanery Confirmation	1 Confirmed at St. John's, Beverly Farms
Boston, Cathedral Church of St. Paul	4/15/2017	Gates	Deanery Confirmation	2 Received from The Crossing
Boston, Cathedral Church of St. Paul	6/17/2017	Harris, G.	Confirmation	2C
Boston, Church of St. Augustine and St. Martin	4/29/2017	Gates	Deanery Confirmation	4 Confirmed
Boston, Church of the Advent	4/29/2017	Gates	Deanery Confirmation	4 Confirmed, 1 Received at St. Augustine and St. Martin in Boston
Bridgewater, Trinity Church	5/13/2017	Cederholm	Deanery Confirmation	6 Confirmed at St. Mark's in Foxborough
Cambridge, St. James's Church	10/7/2017	Gates	Deanery Confirmation	3 Confirmed at St. Andrew's in Wellesley
Chelsea, St. Luke's-San Lucas Church	10/21/2017	Cederholm	Deanery Confirmation	2 Confirmed at The Cathedral, Boston
Chestnut Hill, Church of the Redeemer	5/13/2017	Harris, G.	Deanery Confirmation	18C
Chestnut Hill, Church of the Redeemer	6/10/2017	Harris, G.	Deanery Confirmation	1C

Church	Date	Bishop or Rep	Action	
Danvers, All Saints Episcopal Church of the North Shore	5/2/2017	Gates	Institution	Marya DeCarlen
Danvers, All Saints Episcopal Church of the North Shore	9/16/2017	Gates	Deanery Confirmation	2 Confirmed, 1 Received at St. John's, Beverly Farms
Dedham, St. Paul's Church	5/13/2017	Harris, G.	Deanery Confirmation	10C
Dedham, St. Paul's Church	1/28/2017	Gates	Deanery Confirmation	5 Confirmed at The Cathedral in Boston
Dorchester, St. Mary's Church	1/6/2017	Harris, G.	Institution	Edwin Johnson
Edgartown, St. Andrew's Church	8/20/2017	Gates	Confirmation	1 Confirmed during Visitation
Everett, Grace Church	6/18/2017	Gates	Confirmation	6 Confirmed
Groton, St. John's Chapel/Groton School	4/30/2017	Gates	Confirmation	9 Confirmed at St. Mark's Chapel in Southboro
Groton, St. John's Chapel/Groton School	6/17/2017	Harris, G.	Deanery Confirmation	1C at St. Paul's Cathedral
Groveland, St. James's Church	10/4/2017	Gates	Institution	Kit Lonergan
Hanover, St. Andrew's Church	10/28/2017	Harris, G.	Deanery Confirmation	5 C
Haverhill, Trinity Church	6/17/2017	Harris, G.	Confirmation	1 C at Cathedral Church of St. Paul
Hingham, Parish of St. John the Evangelist	6/17/2017	Harris, G.	Confirmation	11C; 4R
Hudson, St. Luke's Church	6/10/2017	Harris, G.	Deanery Confirmation	2C
Lexington, Church of Our Redeemer	10/7/2017	Gates	Deanery Confirmation	1 Confirmed, 1 Received at St. Andrew's, Wellesley
Lincoln, St. Anne's in-the-Fields Church	6/11/2017	Gates	Confirmation	6 Confirmed during Visitation
Lynn, St. Stephen's Memorial Church	9/16/2017	Gates	Deanery Confirmation	1 Confirmed at St. John's in Beverly Farms
Lynnfield, St. Paul's Church	1/28/2017	Gates	Deanery Confirmation	2 Confirmed at The Cathedral
Malden, St. Paul's Church	9/16/2017	Harris, G.	Deanery Confirmation	9 confirmed
Marion, St. Gabriel's Church	10/7/2017	Gates	Deanery Confirmation	1 Confirmed at St. Andrew's in Wellesley
Marion, St. Gabriel's Church	5/13/2017	Gates	Deanery Confirmation	20 Confirmed at St. Gabriel's Church
Medford, Grace Church	6/11/2017	Harris, G.	Cathedral Confirmation	4 C - 2R
Milton, Church of Our Saviour	10/25/2017	Gates	Institution	Rachael Pettengill-Rasure
Milton, Church of Our Saviour	10/28/2017	Harris, G.	Deanery Confirmation	2 confirmed
Milton, St. Michael's Church	5/13/2017	Harris, G.	Deanery Confirmation	9C
Needham, Christ Church	10/7/2017	Gates	Deanery Confirmation	8 Confirmed at St. Andrew's in Wellesley

Church	Date	Bishop or Rep	Action	
New Bedford, Grace Church	5/13/2017	Gates	Deanery Confirmation	3 Confirmed at St. Gabriel's Church in Marion
Newtonville, St. John's Church	10/7/2017	Gates	Deanery Confirmation	2 Confirmed at St. Andrew's in Wellesley
North Andover, Frank D. Ashburn Chapel/Brooks School	4/30/2017	Gates	Confirmation	1 Confirmed at St. Mark's Chapel in Southboro
North Andover, St. Paul's Church	11/7/2017	Gates	Institution	Sarah Mato
North Billerica, St. Anne's Church	1/10/2017	Harris, G.	Institution	Lauren McLeavey
Plymouth, Christ Church	5/6/2017	Harris, G.	Deanery Confirmation	5C
Quincy, Christ Church	3/5/2017	Gates	Confirmation	7 Confirmed, 2 Received as part of Visitation
Roxbury, St. John St. James Church	4/29/2017	Gates	Deanery Confirmation	1 Received at St. Augustine and St. Martin, Boston
Sandwich, St. John's Church	6/25/2017	Harris, G.	Confirmation	17C; 7R
Saugus, St. John's Church	6/17/2017	Harris, G.	Confirmation	10 C at Cathedral Church of St. Paul
Southborough, St. Mark's Chapel/St. Mark's School	4/30/2017	Gates	Confirmation	17 Confirmed
Stoneham, All Saints' Church	10/28/2017	Gates	Deanery Confirmation	3 Confirmed at Christ Church in Andover
Stoughton, Trinity Church	11/28/2017	Gates	Institution	Harry E. Walton
Stoughton, Trinity Church	10/21/2017	Cederholm	Deanery Confirmation	5 Confirmed, 2 Received, 2 Reaffirmed at The Cathedral in Boston
Watertown, Church of the Good Shepherd	4/29/2017	Gates	Deanery Confirmation	1 Confirmed at St. Augustine and St. Martin in Boston
Westwood, St. John's Church	5/13/2017	Harris, G.	Deanery Confirmation	8C; 7R
Whitman, All Saints' Church	6/4/2017	Cederholm	Confirmation	1 Confirmed, 8 Received during Visitation
Winthrop, St. John's Church	9/16/2017	Harris, G.	Deanery Confirmation	8 Confirmed, 5 Received at St. Paul's, Malden
Wrentham, Trinity Church	5/13/2017	Cederholm	Deanery Confirmation	1 Confirmed, 1 Received at St. Mark's in Foxborough
Wrentham, Trinity Church	6/10/2017	Harris, G.	Deanery Confirmation	2C at St. Elizabeth's, Sudbury

Licensed Lay Readers and Lay Eucharistic Ministers

Licensed as of Advent I of 2017 Based on Applications received as of May 24, 2018.

WL = Worship Leader; EM = Eucharistic Minister; EV = Eucharistic Visitor

Andover, Christ Church			Cranitch, James	WL	EM	
Bell, Dawn	EM		Damon, John	WL		
Blanchard, Elizabeth	EM		Davy, Susan	WL		
Buxton, Rosemarie	EM		Dunigan-Atlee, Aaron	WL	EM	
Cornell, Nancy	EM	EV	Edwards, Betsey	WL		
Kucher, Fran	EM		Edwards, Richard	WL		
Kuhlman, Doug	EM		Fales, Nancy	WL	EM	
Kuhlman, Terry	EM		Ferguson, Marian	WL		
Marcinelli, Holly J.	EM		German, Ann	WL		
Morgan, Ross	EM		Gibson, Phoebe	WL		
Morgan, Terry	EM		Gibson, Sophie	WL		
Rosen, Catherine E.	EM	EV	Gibson, Ted	WL		
Tabor, Nancy	EM		Goodspeed, Susan	WL		
Wagner, Chris	EM		Goodwin, Brad	WL		
			Greene, Robin	WL	EM	
			Gwynne, Peter	WL		
Arlington, St. John's			Hambly, Joy	WL		
Ford, Victoria	EM	EV	Hartley, Cay	WL	EM	EV
Foster, Jr., Frank	EM		Hendrickson, Janet	WL	EM	EV
Larson, Mary Jo	EM		Hinkle, James	WL	EM	
Manion, Laura	EM		Irwin, Harry	WL		
Nyamekye, Andrew	EM		Knauer, Judy			EV
Wilcox, David		EV	Koch, Louise G.	WL	EM	
Ayer, St. Andrew's			Lennon, Kirin	WL		
			Lloyd, Lallie	WL		
Barringer, Nancy	EM	EV	Lytle, Julie	WL		
Campbell, Roben	EM		Mankiewicz, Margaret	WL		
Ferrillo, John	EM	EV	Mullin, Dierdre	WL		
Geller, Isabel	EM	EV	Nawrocki, David	WL	EM	
King, Andrea	EM		Outwin, Kay	WL	EM	
Nasworthy, Avery	EM		Palmer, Matthew	WL		
Quarles, Virginia		EV	Peterson, Linda-Gene	WL	EM	
Smith, Carolyn	EM		Phelps, Judson	WL	EM	
Unkel, Douglas	EM	EV	Prantis, Henry	WL		
Whatley, Charlotte	EM		Saling, Ed	WL		
Barnstable, St. Mary's			Scott, Rebecca	WL		
			Tempesta, Maureen	WL	EM	
Alling, Julia	WL		Umschlag, Janis	WL	EM	
Babcock, Donald	WL					
Booncock, Roger	WL		Bedford, St. Paul's			
Boyle, Mikayla	WL		Anderson, Betsy		EM	
Braun, Eleanor	WL	EM	Gurley, Janice		EM	
Brewster, Connor	WL		Healey, Sharon			EV
Brewster, Kate	WL		Kohler, Jon		EM	
Brisbois, Cece	WL		Kruger, Paul		EM	
Cenzahhi, Angela	WL	EM	Luedde, Heath		EM	

Mercure, Kathleen		EM		Geen, John	WL	EM	EV
Mitchell, Emily	WL	EM		Geen, Suzanne		EM	EV
Parks, Cecelia		EM		Giroux, Edward		EM	
Simmons, Therese			EV	Giroux, Sandra		EM	
Walker, Candace		EM		Hopkins, Cyndi		EM	EV
West, Kathleen		EM		Jones, Elaine		EM	EV
Witbeck, Robert		EM		Kennedy, Susan		EM	
				Komarinski, Mark		EM	
Beverly, St. Peter's				Massey, Marguerite		EM	
Bochynski, Margaret		EM	EV	Westerlund, Margaret		EM	EV
Cabot, John		EM					
DeLollis, Marian		EM		Boston, Cathedral Church of St. Paul			
Farrar, David		EM	EV	Butler, Susan			EV
Lian, Nancy		EM		Lee, Jane			EV
Monahan, Carrie		EM		Morton, Bernetta			EV
Nelson, Joan		EM		Rowe, Jan		EM	EV
Newman, John		EM		Seamans, Jeffrey			EV
Perrott, Godfrey	WL	EM	EV	Tsien, Louis			EV
Ryan, Donald		EM		Van Looy, James			EV
Weeks, Ann		EM					
Whitney, Linda			EV	Boston, Church of the Advent			
Young, John		EM		Blair, Lynda		EM	
				Boyd, John		EM	
Beverly Farms, St. John's				Braman, Robert		EM	
Broudo, Maida		EM	EV	Brown, C. Thomas		EM	
Butler, Ellen		EM	EV	Corrieri, Richard V.		EM	
Drieze, Stephanie		EM	EV	Dale, Charles		EM	
Eaton, Elizabeth		EM	EV	de Carvalho-Rego, Thiago		EM	
Fraizer, Paulette		EM	EV	della Fera, BSG, Br. Ciaran Anthony		EM	
Goodwin, Fred		EM	EV	Fox, Melissa C.		EM	
Hodgkins, Miranda		EM	EV	Gnozzio, Michael		EM	
Karaman, Joseph		EM	EV	Grant, Jason		EM	
Llacera Klein, Jodi		EM	EV	Gurnon, Jack		EM	
Malek, Joseph	WL	EM	EV	Henderson, Dustin		EM	
Massillon, Leon		EM	EV	Hunter, Elizabeth		EM	
McDonough, Linda		EM	EV	Lapin, David		EM	
Morss, Everett		EM	EV	Lewis, Jason		EM	
Newberry, John	WL	EM	EV	McDermott, Thomas		EM	
Pates, John	WL	EM	EV	McNaughton, Melanie		EM	
Pessin, Katherine G.	WL	EM		Murphy, Sr., Michael		EM	
Randolph, Penelope			EV	Pierce, Virginia		EM	
Seamans, Eve			EV	Portee, Raymond		EM	
Shepley, Robert		EM	EV	Roberts, Paul		EM	
Vouwie, Curtis			EV	Sampson, Stephen J.		EM	
Waller, Wendy		EM	EV	Sheffer, Nola P.		EM	
Zaval, Kelly			EV	Ture, Julianne E.		EM	
				Walden, Carolyn		EM	
				Zadig, Michael		EM	
Billerica, St. Anne's				Boston, Christ Church (Old North)			
Brewster, Kathy		EM		Brooksbank, Bruce		EM	
Callihan, Dorothy		EM					
Desmarais, Ronald	WL	EM					

Gwin, Anne	EM	Lamb, Virginia	WL	EM	
Staff, Rosemary	EM	EV			
Boston, Emmanuel Church					
Blocher, Mary	EM				
Bonney, Jaime	EM				
Carlson, Anne E.	EM				
Cavanaugh, Paddy	EM				
Curtis, Paul	EM				
DeVries, Barbara	EM				
Garborcauskas, Garrett	EM				
Griffing, Matthew	EM				
Howard, Joy	EM				
Kieffer, Susan	EM				
Margraf, William	EM				
Redmont, Jane	EM				
Boston, St. Stephen's					
Caines-Francis, Candice	EM				
Gray, Maria	EM				
Post, Margaret	EM				
Boston (Dorchester), All Saints'					
Beckvold, James	EM				
Gray, John	EM				
Gray, Nicholas	EM				
Holmes, Brandon	EM				
McLay, Bruce	EM				
O'Hara, Geoffrey	EM				
Boston (Roxbury), St. John and St. James					
Alexis, Ronel	WL				
Ambrose, Ralph	WL				
Brooks, Norma	EM				
Carr, Marva	WL				
Danglad, Maureen	WL				
Field, Lee	EM				
Harris, Scarvel	WL				
Johnson, Vilma	EM				
King, Betty	EM				
Merricks, Daymond	WL				
Wallace, Glenn	WL				
Wallace, Jordana	EM				
Wallace, Patricia	WL				
Walters, Cabral	WL				
Walters, David E.	EM				
Boston (W. Roxbury), Emmanuel Church					
Gooey, John	WL	EM			
Halliday, Terri	WL	EM			
Kryczka, Susan	WL	EM			
Braintree, Emmanuel Church					
Redmont, Jane			EM		
Brookline, All Saints'					
Brock, Sarah			EM		
Calvert, Laurie			EM	EV	
Cogswell, Carolyn			EM		
Daniell, Jim			EM		
Ellis, Anne Marie			EM	EV	
Hogan, Margaret			EM	EV	
Horner, Elinor Fairchild			EM	EV	
Keary, Mary Urban			EM	EV	
McKinney, Jill			EM		
Nutt-Powell, Thomas E.			EM	EV	
Petersen, Harold A.			EM		
Randall, Bonnie			EM	EV	
Ross, Jane			EM	EV	
Schlaeppli, Yvonne			EM		
Sewall, Lucy			EM	EV	
Thibault, Jeff			EM		
Yankana, Nadira			EM		
Brookline, Our Saviour					
Clauson, Connie			WL	EM	
Creecy, Catherine			WL	EM	
Dalbeck, Betsey			WL	EM	
Foulsham, Dominic			WL	EM	
Gestad, Eric			WL	EM	
Harwood, Tim			WL	EM	
Healy, Paul			WL	EM	
Hepler, Lindsey			WL	EM	EV
Hoyer, Lynn			WL	EM	
Johnson, Celie			WL	EM	
Jones, Sally Hull			WL	EM	
Michmerhuizen, Jim			WL	EM	
Reeve, Jennifer			WL	EM	EV
Reynolds, Alice			WL	EM	
Robbins, Michael			WL	EM	
Shaw, Lisa			WL	EM	
Skillins, Karen			WL	EM	
Sojack, Judy			WL	EM	
Stewart, Caleb			WL	EM	
Tarrant, Richard			WL		
Williams, Steve			WL	EM	
Winslow, Anne			WL	EM	
Young, Joan			WL	EM	
Brookline, St. Paul's					
Baugh, Lorraine			EM		

Boral, Julia	EM	Yoder, Mark	EM
Brue, Andrea	EM	Zook, Lauren	WL EM
Carter, Kenneth	EM		
Choi, Elisabeth	EM	Cambridge, St. Peter's	
Edmonson, Hal	EM	Edmondson, Becky	WL EM
Estes-Smargiassi, Beverly	EM	Lucas, Joy	EV
Fauth, Bo	EM	Van Es, Katy	WL
Ferguson, John	EM EV	Walsh, Beth	WL
Fried, Alan	EM	Wyon, Rachel	WL
Hobbs Miracky, Tammy	EM		
House, Roger	EM	Concord, Trinity Church	
Jacobson, Edward	EM EV	Anderson, John	EM EV
Johnson, Hazel	EM	Atherton, Charles	EM EV
Kurkjian, Maryann	EM EV	Barron, Tracy	EM EV
Luk, Wendy	EM	Birge, Walter W.	WL EM EV
Lukason, Lauren	EM	Burroughs, Carol	EM EV
Maniscalco, Barbara	EM	Ciancio, Suzette	EM EV
Marth, Eliza	EM	Clements, Jeffrey	WL EM EV
Motimele, Matshai	EM	Daniel, Lee	EM EV
Munzer, Betsy	EM	Lattimore, Gresh	WL EM EV
Rugen, Leah	EM EV	Lewis, John	EM EV
Sanches, Linda	EM	Moss, Emily	EM EV
Scheffler, Michael	EM	Newbold, Jennifer	EM EV
Smith, Georgia	EM	Steward, Ernest	WL EM EV
Taylor, Madeleine	EM	Stoessel, Deborah	EM EV
Thiemann, Sarah	EM EV	Thorpe, Margaret	EM EV
Wing, Sharlene	EM	Tilton, Jace	EM
Xie, Adelaide Oneal	EM	Turnquist, Jan	EM EV
		Vockel, Virginia	EM EV
Buzzards Bay, St. Peter's			
Benting, Linda	EM	Danvers, All Saints/North Shore	
Bilancieri, JoAnne	EM	Bianchi, Erika	WL EM
Cain, Barbara	EM EV	Briggs, Janice	WL
Johnson, Emily	EM	Cloutman, Shirley	WL
Letzeisen, Kathy	EM	Coleman, Barbara	WL
Lihzis, Kenneth	EM	Coulson, Ginna	WL EM
Taylor, Mark	EM	Crowley, Lawrence	EV
Willmott, Tim	EM	DeCarlen-Bumiller, Michael	WL
		Drivas, John	WL EM
Cambridge, St. James'		Gamble, Sally	WL
Agard Lynch, Laverne	EM	Gates, Paula	EV
Caulfield, Mary	WL EM EV	Gettings, John	WL
Hirschi, Jane	WL EM	Gordon, Mary	WL
Hixson, John	EM	Hooper, William	WL
King, Marian	WL EM EV	Lemieux, Kat	WL
Maynard, Eric	WL EM	Lord, Erik	WL
Moore-Pollard, Mabel	EM	Lord, Vicki	WL EV
Shumway, Anne	EM EV	Losa, Elizabeth	WL EM
Verdieu, Yvette	WL EM EV	Maitland, Ronda	EM
Wade, Meredith	WL EM	Muriithi, Jeremiah	WL
Weston, Sylvia	WL EM EV	Olendzenski, Leah	EM

Palmer, Lisa	EM	
Pechinsky, Carol		EV
Pelletier, Virginia	WL	
Spencer, Susan	WL	
Stains, Bob	WL	
Symmes, Bruce	EM	

Dedham, St. Paul's

Barbercheck, Joseph	WL	EM
Estabrook, Marcia	WL	EM
Harper-Nixon, Matt	WL	EM
Lamb, Margrit	WL	EM
MacKenzie, Ian	WL	EM
Palmer, Thomas	WL	EM
Parkman, Ted	WL	EM
Pearrow, Mark	WL	EM
Prentice, Julia	WL	EM
Tittler, Julie	WL	EM

Duxbury, St. John the Evangelist

Aghjayan, Chris	EM	EV
Beeby, Kenneth	EM	
Beeby, Shelley	EM	
Breiling, Molly		EV
Chinetti, Susanne	EM	
Conlon, Jan	EM	
Hearn, Dianne	EM	
Heidenreich, Robert	EM	
Heward, Wayne	EM	
Laird, Heidi	EM	
Marcotte, Heidi	EM	
McDonald, Scott		EV
Perkinson, Susannah	EM	EV
Steinke, Jerry	EM	EV

Easton (North), Bristol Trinity Episcopal

Barber, Laura	EM		
Berry, Wendy	EM		
Cole, Norma	EM	EV	
Hinds-Manick, Charlotte	EM	EV	
Hunt, Sharon	WL	EM	
Rys, Claudia		EV	
Shearstone, Cynthia	WL	EM	EV
Silverman, Patricia	WL	EM	EV
Tyler, Lynda	WL	EM	EV

Edgartown, St. Andrew's

Alexander, Susan	WL	EM
Buchholz, Chris	WL	EM
Dietz, Bonnie	WL	EM
Fenn, Marcia	EM	

Huss, Bob	WL	EM	
Kelly, Susan	WL	EM	EV
Kisiel, Harrison	WL	EM	
Slayton, Heather Anne			EV
Taylor, Jo-Ann	WL	EM	EV
von Steiger, Hans	WL	EM	
White, Christine	WL	EM	EV
Wilson, Adam	WL	EM	

Everett, Grace Church

Ajak, Ajah Ajak		EM	
Akon, Athiang Lual		EM	
Ambroise, Ralph	WL		
Arop, Teresa	WL	EM	
Awan, Panther	WL		
Ayiik, James Garang	WL		
Ayuen, John Deng	WL		
Bessler, Louise	WL	EM	EV
Bol, Mangok Mach	WL		
Bothroyd, Alice Claire	WL	EM	EV
Colas, Manio	WL		
Dulorier, Cassandea	WL		
Faison, Margaret	WL	EM	
Gai, Akon Bair	WL		
Galvin, Janis	WL	EM	EV
Guot, Abiar Makor		EM	
Isaacs, Marsha	WL	EM	EV
Leek, Akuot Deng	WL		
Maluil, William Manyok	WL		
Manyok, David Mayen	WL		
Moister, Lucille		EM	
Newton, Taylor	WL	EM	
Preston, Robin	WL	EM	
Ruot, Mary Amou		EM	
Sneed, Beverly Faison	WL	EM	
Yaak, Atem Aruei		EM	

Falmouth, St. Barnabas'

Allen, Judy			EV
Bint, Brian	WL	EM	EV
Bint, Susan		EM	EV
Crowley, Merrily			EV
Cullen, Michael			EV
Davis, Susan		EM	EV
Emerson, Dick		EM	
Gnospelius, Suzanne			EV
Hill, Allen		EM	EV
Hinckley, Jane			EV
Kelleher, Molly		EM	
Kohlmeier, Nathan		EM	
Loos, Ann		EM	EV

McDonough, Helena	EM	EV
Pina, Cynthia	EM	
Rawstrom, Caleb	EM	
Rearдон, Brenda	EM	
Ross, Douglas	EM	
Rowe, Morris	EM	
Scalli, Jane	EM	EV
Scott, Shawn	EM	
Shaver, Ellie	EM	EV
Shearer, Kristin	EM	EV
Stahl, Heidi	WL	EM
Stiefel, Charlotte	EM	
Strohm, Greg	EM	
Strohm, Kim	EM	
Thompsett, Fredrica	EM	
Wessling, Kathy		EV

Franklin, St. John's

Bishop, Patti	WL	EM	
DiGiacamo, Steve	WL	EM	EV
Enright, Amy	WL	EM	
Farrell, Jane M.	WL	EM	EV
Griffith, Abigail	WL		
Griffith, Aidan	WL		
Lobo, Sarah	WL		
Lutz, Scott	WL		
Prear, Nicholas	WL	EM	
Prear, Sonya	WL	EM	
Sher, Amanda	WL	EM	
Sinnery, Donna	WL	EM	
Wrona, Joanna	WL		

Hanover, St. Andrew's

Julien, Carol		EM	
Kelbaugh, Sarah		EM	
Leslie, Karyn		EM	
Leslie, Susannah		EM	
Mirisola, James		EM	
Nickerson, Dave		EM	
Rogers, Joan		EM	
Troupe, Karen A.	WL	EM	EV
White, James		EM	
Wood, JoEllen		EM	

Harwich Port, Christ Church

Aylesworth, Deborah	WL	EM	EV
Butler, Karen	WL	EM	
Decker, Elizabeth	WL	EM	
Lawton, Robert C.	WL	EM	
Lewis, Porter	WL	EM	EV
Romer, Jane	WL	EM	

Hingham, St. John the Evangelist

Bradford, Zoe		EM	
Burnett, Peter		EM	
Chace, Cynthia		EM	
Clinton, David	WL	EM	
Daley, Amanda		EM	
Daley, Jeannette		EM	
Daley, Thomas	WL	EM	
Fredie, Deanna		EM	
Galko, Grace		EM	
Goodhue, Henry		EM	
Hancock, Lucy		EM	
Hatfield, Steve		EM	
Hutchinson, Emily		EM	
Kidder, Phyllis		EM	EV
Lauter, Irma		EM	
Lauter, Talbert		EM	
Linscott, Heather		EM	
Long, Elizabeth		EM	
Magner, Danielle	WL	EM	
McIsaac, Vivian		EM	
Overbeck, Anne		EM	
Rossano, Jamie		EM	
Strehle, Margaret		EM	
Torey, Cathy		EM	
Turbak, Sue		EM	

Holliston, St. Michael's

Ballenger, Grace		EM	
Clark, Joan		EM	EV
Colburn, Alex		EM	
Daly, Helen		EM	EV
Daly, Robert		EM	
Daugherty-Dixon, Pete		EM	
Flannery, Clarissa		EM	
Flannery, Rick		EM	
Frye, Dana	WL	EM	EV
Giarla, Bob		EM	
Girard, Karen		EM	
Hodgman, Leslee		EM	
Koshy, Tom		EM	
Malone, Nancy	WL	EM	EV
May, Kathy		EM	
May, Lyntessa		EM	
McIntyre, Jane	WL	EM	
Ouellette, Linda			EV
PinterParsons, Trevor		EM	
Thorner, Ben		EM	
Weston, Pat		EM	EV

Hudson, St. Luke's

Carnes, William		EM	
Cochrane, Danielle	WL	EM	EV
Hores, Michael	WL	EM	EV
King, Logan	WL	EM	EV
Miller, June	WL	EM	EV
Orcheski, Gail	WL	EM	EV

Lexington, Our Redeemer

Antonevich, Paula		EM	
Antonevich, Russ		EM	
Bernhard, John		EM	
Bowlby, Cassie		EM	EV
Bowlby, Randy		EM	
Burns, Cathy		EM	
Burns, Steve		EM	
Burnside, Jamie		EM	
Burnside, MaryAnne		EM	
Chase, Lee Noel		EM	
Conrad, Lance		EM	
Conrad, Sarah		EM	
Coons, Charlie		EM	
Coons, Elizabeth		EM	
DeFrancesco, Kristina		EM	
DeFrancesco, Paul		EM	
Doan, Hao		EM	
Faber, Andrea		EM	
Fox, Ian	WL	EM	
Frances, Julia	WL	EM	EV
Friesner, Bethany		EM	
Friesner, Richard		EM	
Hausslein, Evelyn	WL	EM	EV
Hausslein, Tommy		EM	
Jacoby, Jeanne		EM	
Kalf, Cara		EM	
King, Bob	WL	EM	
King, Mary Etta		EM	
Klein, Sarah		EM	
Koso, Peter		EM	
Kukolich, Linda		EM	EV
Milkowski, Amie		EM	
Mirani, Kathleen		EM	
Mockett, Kathy		EM	
Murnaghan, Beth		EM	
Murnaghan, George		EM	
Needham, Chris		EM	EV
Needham, Janet		EM	EV
Nokes, Mary		EM	EV
Potdevin, Jackie		EM	
Schragle, Karen		EM	

Skiff, Marcia	EM
Stevens, Sam	EM
Ucci, Mary	EM
Williams, Nancy	EM

Lynnfield, St. Paul's

Bourden, Holly	EM	
Garlow, Gretchen	EM	
March, Priscilla	EM	
Ogren, Carl	EM	EV
Rosato, Jim	EM	EV
Savage, Barbara	EM	
Shea, Carolyn	EM	
Vath, Jennifer	EM	EV
Vath, Jim	EM	

Marblehead, St. Michael's

Armini, Jenny	EM	
Barnett, Jeffrey	EM	
Barr, Katharine	EM	
Bates, Sarah	EM	
Butterworth, Susan	EM	EV
Clay, Stephan	EM	
Doyle, Patrick	EM	
Fizer, Brian	EM	
Haug, Walter	EM	
Nicolas, Annette	EM	EV
Shea, Denise	EM	
Spaberg, Patricia	EM	
Wild, Victor	EM	

Medfield, Church of the Advent

Baker, Donna	WL		
Hill, Geoffrey		EM	
Melzar, Theresa	WL	EM	EV
Moon, Jill	WL	EM	
O'Neil, Logan		EM	
Scanlon, Ingrid	WL	EM	EV

Medford, Grace Church

Benjamin, Maria	EM	EV	
Brownsmith, Esther	EM		
Carson, Louis	EM		
Duggan, Stephen	EM		
Faber Ginggen, Lisa	EM		
Fenn, Jr., Michael	EM		
Foote, Jr., Wesley	WL	EM	EV
Hale, Dennis	EM		
Johnson, Genita	EM		
Llewellyn, M. Emily	EM		
Monnin, Leon	EM		

Muir, Mary			EV	Crane, Terrilee			EM
Opara, Agnes		EM		D'Souza, Diane			EM
Pearson, Brenda		EM	EV	Eder, Frederika			EM
Pietrantonio, June		EM		Eder, Michael			EM
Plausky, Kristin			EV	Fuller, Devereux			EM
Robert, Jr., John			EV	Fuller, Rebecca			EM
Rochinet, Joseph		EM		Grace-Moran, Karen			EM
Scott, Lucinda	WL	EM	EV	Grant, Patricia			EM
Sheets, Robin			EV	Humphreys, David			EM
Smist, Margaret		EM	EV	Humphreys, Jackson			EM
Woodbury, Catherine		EM		Humphreys, Lori			EM
Woodbury, Elizabeth		EM		Hunt, Ann			EM
Woodward, Katherine		EM	EV	Lienf, Heidi			EM
Medway, Christ Church				McKenzie, Elizabeth		WL	EM
Hubbard, Julie A.		EM		McLaughlin, John		WL	EM
McCarthy, Jessica		EM		Ozelius, Laurie			EM
Wahl, Denise		EM		Socci, Robert			EM
Melrose, Trinity Church				Taber, Rene			EM
Bremberg, Charlene		EM	EV	Tello, Monique			EM
Elstad, John		EM		Valencius, Conevery			EM
Fitzgerald, Barbara		EM	EV	Valencius, Zora			EM
Gauch, Sherron		EM		Williams, Carl			EM
Kukura, Philip	WL	EM		Williams, Jacquelin			EM
Porche, Michelle		EM		Williams, James			EM
Retalic, Marie		EM	EV	Zilla-Ba, Kate			EM
Thompson, Michael	WL	EM		Nantucket, St. Paul's			
Methuen, St. Andrew's				Barnes, Curtis		WL	EM EV
Beagan, James	WL	EM	EV	Barnes, Peter			EM
Brown, Beverly	WL	EM	EV	Borneman, Paul			EM
McKeon, Matthew		EM		Boughrum, Alison			EM
McLeod, Krista	WL	EM	EV	Boughrum, Richard			EM
Walta, Laura	WL	EM		Broll, Nancy			EM
Middleboro, Our Saviour				Brown, Betsy			EM
Brown, Thomas		EM		Frale, Godfrey			EM
Costa, Frances	WL	EM	EV	Fronzuto, Suzanne			EM EV
Costa, John	WL	EM	EV	Hall, Beverly			EM
Galvin, Matt		EM		Knox-Johnston, Sandra			EM
Goodrum, Ann Davis	WL	EM	EV	MacNab, Malcolm			EM
Holdsworth, Chelsea		EM		Maltby, Victoria			EM
Phillips, Suzette		EM	EV	Moore, Wm.			EM
Stagliola, Laura		EM		Perelman, Sheri			EM
Wainwright, Betty		EM	EV	Robertson, Ian			EM
Young, Jeremy		EM		Wight, Randall			EM EV
Milton, Our Saviour				Yount, Alan			EM
Cintron, Luis	WL	EM		New Bedford, Grace Church			
Crane, Serena		EM		Baker, Benjamin		WL	EM
				Barnaby, Olivia			EM
				Been, Mary			EM
				Blais, Alexia			EM

Bortelho, Courtney		EM		Davis, Elliot Bostwick		EM	
Bortelho, Melissa		EM		Doran, Lucinda I.		EM	
Boyce, Margaret		EM		Finley, Margot		EM	
Boyce, William		EM		Kennard, Barbara		EM	
Buckles, Patricia			EV	Mead, Laetitia		EM	
Choquette, Leo		EM		Mills, Deborah		EM	
Clarke, Jennifer		EM		Mills, Graeme		EM	
Croteau, Gerald	WL	EM		Murphy, Kathryn		EM	
Decker, Allen	WL	EM		Perry, Velura			EV
Doe, Michael		EM		Peteet, Josh		EM	
Douhan, Zelinda			EV	Tumblin, Jesse		EM	
Howcroft, John	WL	EM		Tumblin, Nicole		EM	
Jaikes, Daniel		EM		Westcott, Suzanne	WL	EM	EV
Kelly, Louise			EV	Williams, Leslie		EM	
Luth, Abbey		EM					
Luth, Autumn		EM		Newton (Waban), Good Shepherd			
Montague, Damien		EM		Bower, Barbara		EM	
Morck, Claire		EM		Bracher, Jack		EM	
Morgan, Mia		EM		Gass, Maureen		EM	
Reed, William		EM		Johnston-Ketterer, Julia		EM	
Roderiques, Pauline		EM	EV				
Ryder, Charlene	WL	EM	EV	Newton Centre, Trinity Church			
St. Julien, Ashley		EM		Bancroft, Martha	WL	EM	
Steliga, Heather		EM		Carter, Nick		EM	
Swain, Joan			EV	Copeland, Carol			EV
Sylvia, Andrew		EM		English, Donna			EV
Sylvia, Brenda		EM		Hilliard, Karen		EM	
Sylvia, Elizabeth		EM		Jones, Bernie			EV
Towers, Kathleen		EM		MacNair, David	WL	EM	
Venter, Caitlin Doe		EM		Norwood, Grace Church			
Webbe, Sydney		EM		Bedard, Jacqueline	WL	EM	
				Bravo, Manuel	WL	EM	
Newburyport, St. Paul's				Gosselin, Edmond	WL		
Aldrich, Ann		EM		Jarrell, Susan	WL		
Bishop, Carole		EM		Loescher, Peter	WL	EM	
Brennan, Beverly		EM		Maloof, Carol	WL	EM	
Cejka, Joyce		EM		Matthews, Brent	WL	EM	
de Stadler, Bronson		EM		Noble, Catherine L.		EM	EV
Hussey, Thomas		EM		Regner, Michael		EM	
Jones, Pam		EM		Wharton, Katherine	WL		
Jukins, Nancy		EM		Wilson, Elizabeth	WL	EM	
Keller, Robert		EM		Orleans, Holy Spirit			
Patton, Dawn		EM					
Peck, Doug		EM		Calhoun, Celia		EM	
Smith, Rosamond		EM		Plymouth, Christ Church			
Terry, Martha		EM					
Walton, Shirley		EM		Bradley, Judith		EM	
				Bradley, Robert		EM	
Newton (Chestnut Hill), The Redeemer				Burgess, Sandra		EM	EV
Allen, Sarah		EM		Carroll, William		EM	
Allen, Timothy		EM					

Courtney, Sr. Brigid		EM	
Eby, Donna		EM	EV
Eby, Donna		EM	EV
Fredrickson, Johnna		EM	
Galvam, Amy		EM	
Garrone, Linda		EM	
Haven, Nancy		EM	
Hester, Elizabeth		EM	EV
Lawrence, Donna		EM	EV
Lee, Fang Chi		EM	
Melahoours, Constance	WL	EM	EV
Metcalfe, Jeffrey		EM	
Metzger, Rebecca		EM	
Nielsen, Robin		EM	EV
Palombo, Priscilla			EV
Perry, Roberta			EV
Stanne, James		EM	EV
Strohschneider, Amy		EM	
Sykes, Cynthia	WL	EM	EV
Tang, Hsin Ju		EM	
Trenouth, Peter	WL	EM	EV
Woodruff, Louise	WL	EM	
Zinger, Martha		EM	

Provincetown, St. Mary's

Avellar, Mary Jo		EM	
Boudreau, Joan		EM	
Chapman, Lisbeth		EM	
Ellsworth, Harry		EM	
Graham, Peter		EM	
Jackett, Priscilla	WL	EM	
Marshall, Alexander		EM	
Matarazzi, Rebecca		EM	
McChensey, Priscilla		EM	
Walker, Robert		EM	
Weinress, Mark		EM	

Quincy, St. Chrysostom's

Beatty, Stephen	WL	EM	
Bocklus-Suwyn, Annie		EM	
Clevenger, Dan	WL		
Good, Barbara		EM	
Hersey, Cliff	WL	EM	
Hutchinson, Harriet		EM	
Keith, Judy		EM	
Lynch, Pat		EM	
Marshall, Elizabeth	WL	EM	
McCloy, Bethany		EM	
McConnell, Eleanor		EM	
Parise, Karla		EM	
Piel, Carrie		EM	

Snow, Carsten		EM	
Springer, Marguerite			EM

Randolph, Trinity Church

Butz, Andrew			EM
Gillis, Sandra			EM
Hennessey, Diane			EM
Heywood, Pauline			EM
Kershaw, Richard	WL		EM
Lutz, Donald			EM
Obukwelu, Gladys			EM

Reading, Good Shepherd

McDormand, Kathleen			EM
Strack, Jessica			EM

Rockland, Trinity Church

Crockett, Daniel		WL	EM
Dunn, Marion		WL	EM
Morse, Charles		WL	EM
Morse, Charles		WL	EM
Ofuokwu, Emmanuel		WL	EM
Ofuokwu, Margaret			EM
O'Neill, Judith		WL	EM
O'Neill, Thomas		WL	EM
Sevier-Harvey, Trudy			EM
Whiting, George		WL	EM

Salem, St. Peter's/San Pedro

Alexander-Hurley, Barbara			EM
Amenu-Kpodo, Aku			EM
Barber, Debbie			EM
Bojos, Andres Martin			EM
Brown, Nancy			EM
Calnen, Diane			EM
Galeano, Alejandro			EM
LaVoie, Jinny	WL	EM	EV
Milman, Heidi			EM
Perez, Suyapa	WL		EM
Reichert, Christine			EM
Robinson, Bruce	WL	EM	EV
Simoneau, Bob			EM
Sweet, Jim	WL		EM

Sandwich, St. John's

Austin, Linda P.			EM
Cohen, Jared			EM
Correia, Wendela			EM
Greene, Janet			EM
Hale, Laurence			EM
Heinlen, Emma			EM

Miller, Anne			EV	Card, Cliff			EM
Rideouty, Clifton			EM	Chafe, Libby			EM
Roche, Anne Geary			EV	Chafe, Matt			EM
Saugus, St. John's				Darias, Janice			EM
Aston, Julia	WL	EM		Davies, Steve			EM EV
Belyea, Stephen	WL	EM		Fisher, Jake			EM
Felci, Paul	WL	EM		Griesel, Ruth			EM EV
Goodwin, Gary	WL	EM		Hamilton, Stuart			EM
Graves, Linda	WL	EM		Howard, John			EM
Littlehale, Elizabeth	WL	EM		Howard, Tim			EM
Phelps, Jean	WL	EM		Howell, Jemi			EM
St. Clair, Sandy	WL	EM		Kimble, Sara			EM
Sharon, St. John's				Knaul, Dan			EM
Angelini, Margaret	WL			Newton, Jim			EM
Harrington, Joanne	WL	EM		Perry, Clare			EM
Shirley, Trinity Chapel				Peters, Jim			EM EV
Doran, Lyn			EM	Phalen, Rachel			EM
McKenna, Bill	WL			Ristau, Edith			EM
Spall, James	WL			Springsteel, Ian			EM
Yancy, Janice	WL			Stewart, Larry			EM
Stoneham, All Saints'				Varner, Kiersten			EM
Beaudin, Fred			EM	Wallingford, Betsy			EM
Collins, Allain	WL			Watson, Rick			EM
Conlon, Jeffrey			EM	Swampscott, Holy Name			
Conlon, Sandra	WL			Chadwell, Brian			EM
Dapkiewicz, Steve	WL	EM		Clausen, Marilyn			EM
Dickey, Kelly	WL	EM		Evans, Hugh			EM
Ditullio, Jeff	WL			Evans, Lynne	WL	EM	
Mandosha-Gori, Danielle			EM	Taunton, St. Thomas'			
Webber, Robert	WL			Belenger, Linda			EM
Stoughton, Trinity Church				Blake, John			EM
Amadi, Ebe	WL	EM	EV	Dennen, Alan			EV
Bunker, Robert	WL	EM		Eldredge, Maureen			EV
Cole, Mary	WL	EM		Hodge, Sonia	WL	EM	EV
Davis, Steven	WL	EM		Kimball, Beverly			EM
Dawkins, Adam	WL	EM	EV	Largey, Marge			EM
Martin, Nancy	WL	EM		LaRue, Terry			EM
Newton, Norma	WL	EM	EV	Leary, Avis			EM EV
Sovinee, Deborah	WL	EM	EV	McNamee, Alex			EM
Spiegel, Lloyd	WL	EM	EV	Miller, Robin			EM EV
Stanley, Jackson	WL	EM		Neugeboren, Brenda			EM
Sylvester, Kathy			EM	Perkins, Wayne			EM
Walls, Martha	WL	EM		Shearer, Monica			EM
Sudbury, St. Elizabeth's				Stagliola, Michael			EM
Brackett, John			EM	Teed, Norman			EM
				Vitale, Renee			EM
				Walker, Len			EM
				Walker, Sarah			EM
				Wargat, Mary			EM EV

Topsfield, Trinity Church

Aldridge, Denise	EM	EV
Kneedler, Pavica	EM	EV
Kyle, Pembroke	EM	
Lightfoot, William	EM	
Lunn, Joan	EM	EV
Magner, Georgie	EM	
McKay, Pam	EM	
Miller, Rebecca	EM	
Shannon, Debra L.	EM	
Shannon, William N.	WL	EM EV
Wisniewski, Ed	EM	

Waltham, Christ Church

Duce, Jonathan	EM	
Dutt, Christine	EM	
Fowler, Maureen	EM	
Fung, Jerome	EM	
Garcia, Byron	EM	
Jones, Anna		EV
Killewald, Alexandra	EM	
Marine, Susan	EM	
Shirley, Andrea	EM	
Wilkes, Louise		EV

Wareham, Good Shepherd

Alfonso, Natecia	EM	
Burgess, Philip	EM	
Ellis, Judy	EM	
Ellis, Richard	EM	
Facchetti, Sheryl	EM	
Foley, Heidi	EM	
Murray, Michelle	EM	
Nyman, Jean	EM	
Parkonen, Maurice	EM	
Pechey, Erica	EM	
Rose, Deborah	EM	
Walsh, Karen	EM	
Williams, Sandra	EM	
Winters, Dale	EM	

Watertown, Good Shepherd

Ahern, Patricia	WL	
Brown, Susan	EM	EV
Byrd, Karen		EV
Dailey, Barbara		EV
Daw, May	WL	
deJong, Jean		EV
Donna, James	WL	
Gyllensvard, Kate	EM	

Harron, William			EV
Holmes, Constance			EV
Lampert, Sandra		EM	EV
Schulte, Jean Ann			EV
Steadman, Stephen	WL	EM	EV
West, Kelly		EM	EV

Westford, St. Mark's

Bert, Lisa			EM
Carlton, Jacqueline	WL	EM	
Carroll, Elaina			EV
Casale, Susan			EV
Culver, Martha			EM
Duran, Susan			EM
Elliott, Herbert	WL	EM	EV
Ellis, Thomas			EM
Fletcher, Frances			EM EV
Hilton, Judie			EM EV
Kintner, Eric			EM
Parsons, Charlotte			EV
Parsons, Robert			EM EV
Pecora, Veronica			EM
Wolfendale, David			EM

Westwood, St. John's

Collier, Jackie			EM EV
Davie, Brian			EM
Davie, Leslie			EM
Dunn, Meredith			EM
Kelly, Ellen			EM EV
Kingsley, Juanita			EM
Kingsley, Victor			EM
Kozlowski, Lynne			EM EV
Macdonald, Alan			EM
Murphy, Robert			EV
Onderdonk, Andrew			EM
Spollen, Lisa			EM
Sugg, Emily			EM EV
Viti, Lynn			EM EV
Viti, Thomas			EM

Weymouth (South), Holy Nativity

Asher, Terry	WL	EM
Blakely-Smith, Bruce	WL	EM
Blakely-Smith, Diana	WL	EM
Crosby, Nancy	WL	EM
Ingalls, Alex		EM
Leamy, Judy	WL	EM
Lucier, Donna	WL	EM
Mermet, Nancy	WL	EM
Morgan, Kyle	WL	EM

Morris, Casey	EM	Winthrop, Bernice	EM
Muller, Edwin	WL EM		
Munise, Nancy	WL EM		
Williams, Stephen	WL EM		
Williams, Terry	WL EM		

Winthrop, St. John's

Aguilo, Elizabeth	EM		
Bailey, Peg	WL EM	EV	
Belcher, Carol	WL EM		
Edmondson, Rebecca	EM		
Foglia, Christine	EM		
Gustafson, Viking		EV	
Long, Richard	WL EM		
Regan, Jay	EM		
Riley, George	WL EM		
Shea, Julie	EM		

Wrentham, Trinity Church

Crocker, Patricia M.	EM	EV	
Davidson, John B.	EM	EV	
Milham, Anita	EM	EV	
Mitchell, Judi	WL EM		
Myers, Bonnie	WL EM		
Pelrine, Diane	WL EM		
Podolsky, Angela	EM	EV	
Robison, Jane	WL EM		
Romans, Barbara		EV	
Simoni, Diane	EM		
Young, Christopher	WL EM		

Yarmouth (South), St. David's

Alden, Rebecca		EV	
Blackwell, Donald	WL EM	EV	
Brewer, John	EM		
Corrigan, Marueen	EM		
Frasier, Jacqueline	EM		
Freeman, Jean	EM		
Halvorsen, Dave		EV	
Johnson, Julia	EM		
Karras, Cathy	EM	EV	
Mavorides, Sally	EM		
Monay, Eugene	EM		
Moyer, Nancy	EM		
O'Neill, Sonny	EM	EV	
Parke, Beverly		EV	
Parke, Robert	EM	EV	
Reid, Susan		EV	
Taylor, Arthur		EV	
Vigilano, Gary	EM		
Ward, Robin	EM		

Diocese of Massachusetts

Vital Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2017

— 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	302	302	0	113	105	0	3	0
Amesbury	Episcopal Church of St James	203	196	0	50	89	1	2	3
Andover	Parish of Christ Church	940	565	27	157	108	1	8	20
Arlington	Church of Our Saviour	97	72	80	46	67	0	5	0
Arlington	St Johns Church	113	73	2	41	94	0	0	0
Attleboro	All Saints Episcopal Church	62	0	55	30	50	0	0	0
Ayer	St Andrews Episcopal Church	187	136	0	58	79	0	2	5
Barnstable	St Marys Episcopal Church	614	614	0	186	174	0	10	0
Bedford	St Pauls Episcopal Church	470	414	15	127	62	2	7	9
Belmont	All Saints Episcopal Church	146	117	0	66	92	0	2	3
Beverly	St Peters Episcopal Church	260	178	28	75	103	1	9	5
Beverly Farms	St Johns Church (2016)	1,548	1,198	350	147	107	0	15	14
Boston	Emmanuel Episcopal Church	363	363	0	137	54	0	2	0
Boston	Old North Christ Church (2016)	281	124	25	119	105	0	6	2
Boston	St Augustine and St Martin	95	95	0	30	52	0	0	4
Boston	St Stephen Episcopal Church	240	201	0	80	57	0	8	0
Boston	The Church of the Advent	446	434	0	240	152	0	1	10
Boston	Trinity Church Episcopal	2,752	755	3,816	868	171	3	17	1
Braintree	Emmanuel Episcopal Church	211	190	10	56	3,187	0	1	0
Bridgewater	Trinity Episcopal Church	233	218	0	71	0	5	0	6
Brookline	All Saints Parish	464	365	50	170	109	1	6	1
Brookline	Church of Our Saviour	405	125	31	79	0	0	3	7
Brookline	St Pauls Episcopal Church (2016)	508	508	0	188	105	0	7	0
Burlington	St Marks Episcopal Church	112	75	0	38	53	0	2	1
Buzzards Bay	Church of St Peters on the Canal	376	122	11	104	103	1	5	0
Cambridge	Christ Episcopal Church (2016)	671	652	21	219	132	0	4	8
Cambridge	St Bartholomews Episcopal Church (2016)	171	169	1	71	96	0	3	0
Cambridge	St James Episcopal Church	783	548	6	119	97	2	2	4
CAMBRIDGE	St Peters Episcopal Church	140	118	20	63	93	0	0	0
Canton	Trinity Church Episcopal (2013)	181	103	2	36	102	1	2	0
Charlestown	St Johns Episcopal Church (2016)	110	91	25	79	103	2	8	5
Chatham	St Christophers Church (2016)	834	584	0	190	107	0	16	9
Chelmsford	All Saints Church	735	731	20	178	53	1	1	1
Chelsea	St Lukes/San Lucas Episcopal Church	182	162	45	134	185	0	15	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	764	764	0	167	16	0	8	18
Cohasset	St Stephens Episcopal Church	783	290	0	90	0	0	12	0
Concord	Trinity Episcopal Church	1,400	861	1	196	106	0	6	1
Danvers	All Saints Episcopal Church of the North Shore	288	255	0	96	102	0	4	3
Dartmouth	St Peters Episcopal Church	64	64	5	41	49	0	2	6
Dedham	Church of the Good Shepherd	71	71	0	32	55	0	0	0
Dedham	St Pauls Church Episcopal	481	335	16	110	87	1	6	15
Dorchester	Parish of All Saints	365	320	0	132	105	1	5	2
Dorchester	St Marks Episcopal Church	95	72	4	53	52	0	1	0
Dorchester	St Mary Episcopal Church	128	99	6	58	40	0	6	0
Dover	St Dunstons Episcopal Church	216	113	11	50	54	0	1	0
Duxbury	Parish of St John the Evangelist	1,128	1,128	0	120	94	1	14	7
East Boston	Grace Federated Church	7	7	12	15	0	0	1	0
Edgartown	St Andrews Episcopal Church	166	166	0	78	112	0	6	1
Everett	Grace Episcopal Church	250	122	0	89	112	0	17	6
Fall River	Church of the Holy Spirit	180	108	0	66	148	0	20	0
Fall River	St Lukes Episcopal Church	79	42	27	32	48	0	3	0
Falmouth	St Barnabas Memorial Church	507	504	44	180	7	0	11	0
Foxborough	St Marks Episcopal Church (2016)	240	240	0	85	128	0	3	0
Framingham	St Andrews Episcopal Church	564	459	15	108	95	0	4	0
Franklin	St Johns Episcopal Church	120	91	1	65	51	0	6	0
Gloucester	St Johns Episcopal Church	442	240	40	70	89	0	0	0
Groveland	St James Episcopal Church	203	178	23	62	0	0	3	3
Hanover	St Andrews Episcopal Church	553	325	0	72	87	1	3	5
Harwich Port	Christ Episcopal Church	302	126	10	67	98	0	1	0
Haverhill	Trinity Episcopal Church	130	75	20	35	52	0	1	0
Hingham	Parish of St John the Evangelist	1,467	1,467	5	265	143	0	37	15
Holbrook	St Johns Episcopal Church	70	58	0	43	57	0	3	0
Holliston	St Michaels Church	290	247	0	76	100	0	4	5
Hopkinton	St Pauls Church Episcopal	41	41	0	29	50	0	2	0
Hudson	St Lukes Episcopal Church	191	184	0	30	50	0	2	2
Hyde Park	Iglesia de San Juan	41	38	3	12	0	0	3	4
Hyde Park	Parish of Christ Church	185	181	4	65	62	0	3	4
Ipswich	Ascension Memorial Church	397	397	0	119	100	1	0	0

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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	225	225	0	55	56	0	6	1
Lawrence	Grace Episcopal Church	210	210	10	52	148	6	9	0
Lexington	Church of Our Redeemer	463	219	0	120	109	0	2	2
Lincoln	St Annes in the Fields Church	486	442	0	132	19	0	7	12
Lowell	St Annes Episcopal Church	280	230	0	84	140	0	3	0
Lowell	St Johns Episcopal Church	82	54	0	26	47	0	0	0
Lynn	St Stephens Memorial Church	345	345	15	172	120	0	6	1
Lynnfield	St Pauls Episcopal Church	355	355	0	91	92	0	10	3
Malden	St Pauls Church	116	80	3	49	53	0	3	0
Marblehead	St Michaels Church Episcopal	292	284	10	88	97	0	4	10
Marblehead	Wyman Memorial Church of St Andrew	387	302	42	108	102	0	12	0
Marion	St Gabriels Episcopal Church	513	448	110	132	103	1	4	21
Marshfield	Trinity Episcopal Church (2016)	178	146	32	53	101	1	2	0
Mattapan	Church of the Holy Spirit (2016)	440	417	0	170	1	0	3	0
Medfield	Church of the Advent	256	196	0	68	79	1	2	0
Medford	Grace Episcopal Church	465	465	4	152	140	0	8	4
Medway	Christ Church	166	118	0	28	55	0	1	0
Melrose	Trinity Episcopal Church	152	152	0	65	89	0	4	0
Methuen	St Andrews Church	246	112	21	38	54	0	7	0
Middleborough	Church of Our Saviour Episcopal	148	148	7	44	105	0	1	0
Milton	Episcopal Church of Our Saviour	48	48	0	20	49	0	0	2
Milton	St Michaels Church (2016)	719	719	0	87	102	0	7	0
Nantucket	St Pauls Episcopal Church	548	508	0	112	61	0	4	0
Natick	St Pauls Episcopal Church	672	558	0	110	120	0	4	18
Needham	Christ Church Episcopal	815	724	0	116	93	0	2	8
New Bedford	Grace Church Episcopal	661	515	0	195	148	0	7	2
New Bedford	St Andrews Church	312	102	0	45	51	0	2	0
New Bedford	St Martins Episcopal Church	129	85	10	36	48	0	3	0
Newburyport	St Pauls Episcopal Church	386	353	0	94	85	0	7	5
Newton	Grace Episcopal Church	241			0				0
Newton Centre	Trinity Parish of Newton Centre	56	56	8	46	48	0	1	0
Newton Highlands	St Pauls Episcopal Church	192	192	24	60	80	0	2	7
Newton Lower Falls	St Marys Episcopal Church	404	404	0	95	100	0	5	0
Newtonville	St Johns Episcopal Church	105	84	10	46	89	0	0	4

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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 (2016)	311	311	56	81	83	1	4	6
North Attleboro	Grace Episcopal Church-N Attleboro	158	107	2	36	92	3	0	7
North Billerica	St Annes Episcopal Church	195	195	0	66	108	0	5	0
North Easton	Bristol Trinity Episcopal Church (2016)	88	69	3	33	53	0	0	0
Norwood	Grace Episcopal Church	230	230	10	50	91	0	4	0
Oak Bluffs	Trinity Episcopal Church	0			0				0
Orleans	The Church of the Holy Spirit	501	471	3	180	155	0	2	0
Osterville	St Peters Church Episcopal	249	154	0	90	104	0	3	0
Plymouth	Christ Church Parish	771	361	2	156	149	0	6	5
Provincetown	St Mary of the Harbor	135	71	62	71	63	0	1	0
Quincy	Christ Church	159	159	0	68	0	1	5	9
Quincy	The Parish of St Chrysostoms	158	90	16	65	60	0	5	0
Randolph	Trinity Church (2016)	188	159	0	52	90	0	1	0
Reading	Church of the Good Shepherd	445	320	10	80	72	5	0	4
Rockland	Trinity Episcopal Church	107	87	1	45	105	0	4	0
Rockport	St Marys Episcopal Church	288	265	25	101	110	2	0	12
Roxbury	St Cyprians Episcopal Church	223	0	0	123	9	0	2	0
Roxbury	St Johns St James Church	91	73	0	35	52	0	0	1
Salem	Grace Episcopal Church (2016)	563	386	23	75	115	0	1	0
Salem	St Peters Episcopal Church (2016)	363	184	18	80	0	3	0	5
Sandwich	St Johns Episcopal Church	542	340	131	139	156	0	6	24
Saugus	St Johns Episcopal Church	256	140	0	59	91	0	2	10
Scituate	St Lukes Episcopal Church Scituate	497	150	0	86	102	0	2	0
Sharon	St Johns Church	8	4	6	12	64	0	0	0
Shirley	Trinity Chapel	110	59	2	22	0	0	0	0
Somerset	Church of Our Saviour	277	277	40	112	105	0	15	0
Somerville	St James Episcopal Church	22	16	0	18	0	0	1	0
South Hamilton	Christ Church	333	333	38	213	141	0	7	0
South Weymouth	Church of the Holy Nativity	605	577	0	98	102	0	9	0
South Yarmouth	St Davids Church	275	231	44	133	103	0	3	0
Southborough	St Marks Church	557	335	80	124	134	0	5	0
Stoughton	Trinity Episcopal Church	131	131	0	50	64	2	8	9
Sudbury	St Elizabeths Episcopal Church	365	365	0	112	125	0	1	18
Swampscott	The Church of the Holy Name (2016)	115	115	1	64	91	0	5	0

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— BAPTISMS —

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Swansea	Christ Episcopal Church	291	248	0	73	1	0	3	0
Taunton	Episcopal Church of St Thomas	192	190	0	107	136	0	0	0
Topsfield	Trinity Episcopal Church	581	355	14	57	91	0	4	0
Vineyard Haven	Grace Episcopal Church	141	141	0	72	106	0	0	0
Waban	Church of the Good Shepherd	227	227	0	119	95	1	6	0
Wakefield	Emmanuel Episcopal Church	182	144	1	65	90	0	3	0
Walpole	Epiphany Episcopal Church	193	154	6	62	92	0	6	0
Waltham	Christ Church Parish	370	225	0	67	107	0	2	0
Wareham	Church of the Good Shepherd	270	149	0	76	100	0	7	0
Watertown	Church of the Good Shepherd	193	166	18	57	89	1	2	1
Wellesley	St Andrews Episcopal Church	1,865	1,128	0	243	137	1	7	33
Wellfleet	Chapel of St James the Fisherman	0	0	0	71	28	0	2	0
West Newbury	All Saints Episcopal Church (2016)	32	32	0	20	0	0	2	0
West Roxbury	Parish of Emmanuel Church	60	56	5	28	54	1	2	0
Westford	St Marks Episcopal Church	180	130	0	42	52	0	3	7
Weston	St Peters Church Episcopal	595	361	0	67	96	0	1	0
Westwood	St Johns Episcopal Church	280	236	18	62	69	1	1	17
Whitman	All Saints Parish	131	131	0	48	98	3	0	9
Wilmington	St Elizabeths Episcopal Church	172	172	3	34	0	0	1	0
Winchester	Parish of the Epiphany	856	856	0	270	108	0	11	9
Winthrop	St Johns Episcopal Church	134	105	0	64	157	0	7	13
Woburn	Trinity Episcopal Church	164	40	0	18	58	0	0	0
Woods Hole	Church of the Messiah Epis Church	260	239	8	74	101	0	2	0
Wrentham	Trinity Episcopal Church	209	186	23	66	53	2	6	4
Total		55,430	41,998	5,862	14,553	16,086	62	693	520

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Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2017

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	349,026	373,668	399,963	347,946	40,771	14,826	366,729
Amesbury	Episcopal Church of St James	28,666	79,207	79,207	157,731	8,550	4,550	157,731
Andover	Parish of Christ Church	547,465	614,332	1,265,937	575,140	80,221	720,527	1,295,063
Arlington	Church of Our Saviour	149,628	160,043	228,563	156,107	12,065	7,893	162,641
Arlington	St Johns Church	109,541	147,113	207,366	145,935	19,675	136,938	285,427
Attleboro	All Saints Episcopal Church	52,545	137,051	159,425	89,731	4,846	43,710	133,527
Ayer	St Andrews Episcopal Church	131,340	167,638	228,879	185,759	15,355	76,766	257,521
Barnstable	St Marys Episcopal Church	366,030	707,112	841,943	683,537	54,071	81,064	795,669
Bedford	St Pauls Episcopal Church	230,281	274,453	323,767	257,523	23,242	52,434	326,051
Belmont	All Saints Episcopal Church	216,366	274,898	400,859	280,048	28,221	156,357	431,112
Beverly	St Peters Episcopal Church	160,940	304,526	375,960	325,014	30,794	30,794	356,147
Beverly Farms	St Johns Church (2016)		0	0	0		0	0
Boston	Emmanuel Episcopal Church	274,554	718,766	879,433	622,104	36,637	264,707	726,263
Boston	Old North Christ Church (2016)	163,976	412,303	423,366	444,364	15,000	4,200	455,427
Boston	St Augustine and St Martin	79,425	140,037	146,813	135,804	12,776	74,129	209,933
Boston	St Stephen Episcopal Church	97,094	120,016	1,899,298	70,601	1,614	1,638,022	1,716,524
Boston	The Church of the Advent	551,810	1,402,797	1,737,027	1,375,354	163,263	249,138	1,604,492
Boston	Trinity Church Episcopal	3,170,455	3,371,247	18,943,320	3,230,218	409,233	15,699,744	18,805,401
Braintree	Emmanuel Episcopal Church	80,605	118,220	134,555	115,804	6,500	4,160	119,434
Bridgewater	Trinity Episcopal Church	105,024	120,609	124,995	115,561	8,509	1,329	116,580
Brookline	All Saints Parish	379,966	490,829	573,544	482,005	51,089	160,203	657,307
Brookline	Church of Our Saviour	226,653	311,585	420,614	313,630	37,692	25,505	326,170
Brookline	St Pauls Episcopal Church (2016)	323,090	515,160	554,617	516,861	58,506	96,988	563,937
Burlington	St Marks Episcopal Church	88,171	135,323	143,504	133,318	7,902	14,279	146,107
Buzzards Bay	Church of St Peters on the Canal	116,416	175,344	181,897	155,962	12,887	5,475	156,961
Cambridge	Christ Episcopal Church (2016)	674,497	1,079,980	1,252,935	1,083,446	94,623	434,670	1,405,707
Cambridge	St Bartholomews Episcopal Church (2016)	144,109	191,213	194,710	180,967		13,475	194,442
Cambridge	St James Episcopal Church	275,620	455,693	586,041	410,109	54,443	82,877	472,310
CAMBRIDGE	St Peters Episcopal Church	186,344	349,705	501,692	299,467	33,213	92,027	388,132

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

Year in parentheses is last year of filing if not 2017

City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Canton	Trinity Church Episcopal (2013)	18,670	200,078	200,078	169,310	15,384	1,425	169,310
Charlestown	St Johns Episcopal Church (2016)	153,973	202,299	202,299	218,861	21,852	5,513	220,221
Chatham	St Christophers Church (2016)	549,914	692,243	1,041,708	688,749	78,676	244,325	948,874
Chelmsford	All Saints Church	301,539	338,419	466,473	339,656	38,078	123,979	461,135
Chelsea	St Lukes/San Lucas Episcopal Church	50,689	193,811	229,757	178,211	4,000	38,452	215,384
Chestnut Hill	Church of the Redeemer	969,108	1,084,338	1,488,066	992,517	131,405	118,276	1,221,206
Cohasset	St Stephens Episcopal Church	341,388	432,252	432,252	416,607	45,478	78,041	469,802
Concord	Trinity Episcopal Church	828,344	874,543	1,039,373	788,558	104,493	102,821	894,846
Danvers	All Saints Episcopal Church of the North Shore	209,017	223,513	397,986	233,064	17,120	167,366	405,980
Dartmouth	St Peters Episcopal Church	27,676	68,325	68,325	57,123	2,797	16,473	69,965
Dedham	Church of the Good Shepherd	60,538	114,316	117,434	100,138	7,685	26,169	125,344
Dedham	St Pauls Church Episcopal	310,000	425,931	482,392	406,865	43,888	31,850	442,594
Dorchester	Parish of All Saints	253,479	477,067	521,794	447,836	42,680	44,727	492,563
Dorchester	St Marks Episcopal Church	93,977	112,996	112,996	86,645	14,781	4,750	87,445
Dorchester	St Mary Episcopal Church	90,484	186,760	197,315	197,129	7,791	18,771	215,762
Dover	St Dunstans Episcopal Church	315,130	315,130	370,108	303,040	37,147	23,590	324,975
Duxbury	Parish of St John the Evangelist	353,668	379,700	881,491	369,925	40,788	94,078	489,915
East Boston	Grace Federated Church	3,153	19,153	19,153	18,028	28	0	18,028
Edgartown	St Andrews Episcopal Church	182,578	354,932	500,455	352,896	35,542	225,378	558,946
Everett	Grace Episcopal Church	39,411	92,706	125,418	133,176		15,698	149,611
Fall River	Church of the Holy Spirit	46,636	218,972	220,498	205,497	36,072	39,305	244,802
Fall River	St Lukes Episcopal Church	25,135	46,803	62,423	50,442	500	22,028	64,940
Falmouth	St Barnabas Memorial Church	346,704	591,836	748,697	584,792	72,776	81,469	742,208
Foxborough	St Marks Episcopal Church (2016)	153,327	176,744	176,744	151,811	14,803	200	151,811
Framingham	St Andrews Episcopal Church	223,018	295,986	437,581	401,639	34,683	10,361	411,146
Franklin	St Johns Episcopal Church	86,989	110,107	171,338	134,952	11,351	25,821	160,773
Gloucester	St Johns Episcopal Church	151,103	281,540	363,157	274,083	28,514	59,923	329,862
Groveland	St James Episcopal Church	100,420	161,796	161,796	154,150	13,464	17,306	166,865

Diocese of Massachusetts

Financial Statistics of Congregations and Missions

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		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Hanover	St Andrews Episcopal Church	118,009	171,179	183,898	139,353	12,070	107,715	243,778
Harwich Port	Christ Episcopal Church	124,791	327,065	327,065	321,423	37,240	10,725	324,923
Haverhill	Trinity Episcopal Church	41,155	265,672	351,404	263,193	21,808	141,621	328,990
Hingham	Parish of St John the Evangelist	580,372	757,269	898,706	732,946	72,902	189,748	895,488
Holbrook	St Johns Episcopal Church	30,194	96,924	141,487	95,896	7,000	50,886	146,959
Holliston	St Michaels Church	153,800	190,275	223,862	190,898	17,455	17,324	213,530
Hopkinton	St Pauls Church Episcopal	43,500	102,534	105,847	120,969	6,797	6,958	127,383
Hudson	St Lukes Episcopal Church	56,920	73,322	87,895	82,729	2,936	22,654	105,819
Hyde Park	Iglesia de San Juan	2,540	2,540	2,540	0		1,000	1,000
Hyde Park	Parish of Christ Church	47,493	140,489	174,413	145,155	3,469	67,676	206,959
Ipswich	Ascension Memorial Church	230,260	294,518	294,518	285,530	29,549	23,359	301,013
Jamaica Plain	St Johns Episcopal Church	142,864	230,768	292,050	227,280	20,171	34,060	257,922
Lawrence	Grace Episcopal Church	53,525	267,215	275,531	263,177	17,404	64,678	330,929
Lexington	Church of Our Redeemer	335,137	489,079	560,310	437,879	51,014	14,889	457,736
Lincoln	St Annes in the Fields Church	567,518	625,834	1,578,562	651,001	80,648	653,077	1,291,078
Lowell	St Annes Episcopal Church	59,193	265,574	344,209	304,930	18,175	106,011	328,557
Lowell	St Johns Episcopal Church	21,100	62,043	97,337	77,548	1,507	36,113	113,661
Lynn	St Stephens Memorial Church	160,099	519,288	670,605	449,620	40,133	352,966	820,644
Lynnfield	St Pauls Episcopal Church	204,966	273,905	284,333	265,593	19,338	5,428	298,147
Malden	St Pauls Church	82,348	117,578	168,921	95,399	9,176	102,191	197,399
Marblehead	St Michaels Church Episcopal	252,182	353,553	415,251	353,005	42,318	1,000	375,523
Marblehead	Wyman Memorial Church of St Andrew	290,522	439,693	481,952	444,301	39,918	44,686	454,847
Marion	St Gabriels Episcopal Church	410,979	479,881	731,097	475,713	59,895	77,141	627,985
Marshfield	Trinity Episcopal Church (2016)	107,628	179,553	236,347	179,889	17,427	68,468	213,819
Mattapan	Church of the Holy Spirit (2016)	281,633	344,781	376,109	315,687	32,115	72,990	356,872
Medfield	Church of the Advent	178,036	243,766	249,579	231,416	26,636	4,838	235,554
Medford	Grace Episcopal Church	228,846	408,389	425,008	406,465	42,371	77,353	477,508
Medway	Christ Church	45,185	68,189	75,017	65,358	1,603	4,826	69,980
Melrose	Trinity Episcopal Church	142,218	220,049	220,049	271,869	24,277	82,867	349,236

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City	Congregation	REVENUE			EXPENSE			
		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Methuen	St Andrews Church	56,133	114,938	115,934	91,601	4,017	25,865	113,647
Middleborough	Church of Our Saviour Episcopal	76,663	177,619	195,701	145,916	15,061	5,926	154,107
Milton	Episcopal Church of Our Saviour	43,261	196,214	196,214	170,755	13,968	49,756	210,264
Milton	St Michaels Church (2016)	399,726	546,315	807,650	546,315	67,473	28,782	553,235
Nantucket	St Pauls Episcopal Church	404,026	510,759	565,845	467,066	67,142	43,704	534,775
Natick	St Pauls Episcopal Church	403,124	479,709	590,568	485,937	63,433	95,533	603,572
Needham	Christ Church Episcopal	390,562	539,120	539,120	544,734	70,341	18,622	544,734
New Bedford	Grace Church Episcopal	297,087	539,388	930,088	493,836	67,856	371,586	903,443
New Bedford	St Andrews Church	57,801	113,341	173,184	109,031	5,072	55,808	141,359
New Bedford	St Martins Episcopal Church	35,686	107,827	118,953	107,839	7,006	37,186	150,025
Newburyport	St Pauls Episcopal Church	271,050	330,187	743,256	351,693	34,993	140,266	494,591
Newton	Grace Episcopal Church	192,777	404,087	404,087	404,087	45,418	35,860	433,279
Newton Centre	Trinity Parish of Newton Centre	190,933	384,134	499,114	351,805	37,590	163,908	493,662
Newton Highlands	St Pauls Episcopal Church	178,062	236,403	345,422	214,152	25,160	100,066	315,337
Newton Lower Falls	St Marys Episcopal Church		0	0	0		0	0
Newtonville	St Johns Episcopal Church		0	0	0		0	0
North Andover	St Pauls Episcopal Church (2016)	155,343	233,644	291,550	233,805	23,540	32,049	266,474
North Attleboro	Grace Episcopal Church-N Attleboro	113,851	175,803	196,003	196,027	18,228	3,621	207,175
North Billerica	St Annes Episcopal Church	127,096	236,149	242,197	223,118		16,551	240,213
North Easton	Bristol Trinity Episcopal Church (2016)		0	0	0		0	0
Norwood	Grace Episcopal Church	91,160	135,866	154,511	134,968	12,535	1,726	136,694
Oak Bluffs	Trinity Episcopal Church	13,087	27,963	62,286	26,610		43,428	63,913
Orleans	The Church of the Holy Spirit	427,251	577,393	706,674	570,601	53,563	153,212	711,643
Osterville	St Peters Church Episcopal	232,771	319,575	609,333	317,684	39,720	27,711	341,520
Plymouth	Christ Church Parish	264,133	347,025	358,155	381,027	44,404	22,633	391,764
Provincetown	St Mary of the Harbor	183,107	205,050	365,793	210,805	19,555	41,829	244,285
Quincy	Christ Church	83,945	188,713	429,705	213,247	12,301	233,300	416,630
Quincy	The Parish of St Chrysostoms	151,298	203,957	239,636	217,054	19,797	51,866	266,610
Randolph	Trinity Church (2016)	61,619	89,935	89,935	93,656	7,352	0	93,656

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		Plate & Pledae Income	Operating Revenue	Total Revenue	Operating Expense	To the Diocese	Outreach & Development	Total Expense
Reading	Church of the Good Shepherd	164,293	221,880	310,012	229,985	20,056	80,045	315,032
Rockland	Trinity Episcopal Church	72,559	86,152	97,196	88,227	6,597	10,406	101,630
Rockport	St Marys Episcopal Church	169,832	187,382	191,282	189,154	28,680	1,633	194,687
Roxbury	St Cyprians Episcopal Church	164,337	207,713	207,713	240,247	21,222	0	240,247
Roxbury	St Johns St James Church		0	0	0		0	0
Salem	Grace Episcopal Church (2016)	129,696	187,863	187,863	187,863	15,992	31,681	187,863
Salem	St Peters Episcopal Church (2016)	62,419	257,694	257,694	252,353	12,427	4,980	252,353
Sandwich	St Johns Episcopal Church	223,961	292,542	551,772	249,042	32,841	212,752	465,122
Saugus	St Johns Episcopal Church	85,417	161,350	167,783	160,313	9,254	4,715	162,669
Scituate	St Lukes Episcopal Church Scituate	197,378	255,212	255,212	242,211	31,662	2,500	242,211
Sharon	St Johns Church	11,583	49,194	51,119	48,129	1,600	5,603	52,729
Shirley	Trinity Chapel		0	0	0		0	0
Somerset	Church of Our Saviour	133,794	168,617	171,733	135,509	10,280	6,771	143,573
Somerville	St James Episcopal Church	25,824	65,139	67,344	77,259	4,383	0	77,259
South Hamilton	Christ Church	528,804	560,046	580,497	548,122	58,620	66,995	631,075
South Weymouth	Church of the Holy Nativity	127,812	181,828	240,244	158,194	14,378	2,450	158,194
South Yarmouth	St Davids Church	265,435	332,722	349,804	337,486	23,447	70,176	393,951
Southborough	St Marks Church	292,129	315,347	332,480	294,748	27,419	16,058	312,810
Stoughton	Trinity Episcopal Church	66,727	138,901	163,143	105,405	11,022	44,726	148,695
Sudbury	St Elizabeths Episcopal Church	453,525	481,399	672,114	455,815		151,154	602,220
Swampscott	The Church of the Holy Name (2016)	84,434	159,575	181,489	152,449	15,750	38,672	191,121
Swansea	Christ Episcopal Church	134,353	178,610	278,610	197,417	17,675	0	197,417
Taunton	Episcopal Church of St Thomas		0	0	0		0	0
Topsfield	Trinity Episcopal Church	228,551	271,957	273,126	257,599	31,876	400	258,363
Vineyard Haven	Grace Episcopal Church	163,386	303,713	482,912	290,809	33,446	227,596	507,348
Waban	Church of the Good Shepherd	369,372	396,513	407,428	413,858	48,719	98,191	492,554
Wakefield	Emmanuel Episcopal Church	138,040	209,167	221,515	208,852	20,814	76,712	279,073
Walpole	Epiphany Episcopal Church	90,494	170,591	191,824	158,284	21,085	30,427	188,711
Waltham	Christ Church Parish	120,339	255,488	278,270	156,297	29,396	84,024	204,656

Diocese of Massachusetts

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City	Congregation	REVENUE			EXPENSE			
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Wareham	Church of the Good Shepherd	154,327	227,065	227,065	217,918	16,954	14,743	223,966
Watertown	Church of the Good Shepherd	164,050	229,708	234,033	223,609	12,410	10,845	227,628
Wellesley	St Andrews Episcopal Church	892,926	1,283,181	1,328,014	1,242,663	132,639	87,715	1,284,159
Wellfleet	Chapel of St James the Fisherman	55,070	63,111	160,915	62,508		29,700	63,708
West Newbury	All Saints Episcopal Church (2016)	4,606	46,476	46,476	56,473	1,300	0	56,473
West Roxbury	Parish of Emmanuel Church	40,843	72,518	73,518	77,927	6,000	1,179	78,106
Westford	St Marks Episcopal Church	128,785	156,503	230,051	147,627	14,668	72,878	218,005
Weston	St Peters Church Episcopal	341,605	479,925	521,601	452,194	63,557	167,483	601,850
Westwood	St Johns Episcopal Church	176,088	180,550	204,054	179,457	9,000	81,925	257,409
Whitman	All Saints Parish	82,039	116,996	136,751	98,342	7,456	13,247	120,696
Wilmington	St Elizabeths Episcopal Church	38,812	43,315	43,315	43,874	708	12,692	55,250
Winchester	Parish of the Epiphany	836,399	905,971	1,083,317	905,031	102,158	179,110	1,029,366
Winthrop	St Johns Episcopal Church	130,761	166,425	223,685	165,192	15,142	54,160	221,152
Woburn	Trinity Episcopal Church	22,549	83,030	83,030	64,385	6,499	2,806	66,330
Woods Hole	Church of the Messiah Epis Church	130,652	270,139	270,139	353,011	33,327	125,577	473,464
Wrentham	Trinity Episcopal Church	171,954	173,310	203,774	174,860	15,906	7,160	182,120
Total		33,336,230	48,048,021	76,932,070	46,844,035	4,740,716	28,198,811	74,228,149

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