

DIOCESAN CONVENTION, NOVEMBER 2 - 3, 2012
CATHEDRAL CHURCH OF ST. PAUL, BOSTON

PROPOSED 2013 DIOCESAN BUDGET

APPROVED

Answering God's urgent call. Together.

EPISCOPAL DIOCESE OF MASSACHUSETTS

INVITING, FORMING, SENDING, SERVING

Proposed 2013 Diocesan Budget

The 227th Annual Convention of the Episcopal Diocese of Massachusetts
Cathedral Church of St. Paul, Boston
November 2-3, 2012



Statement of Mission

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

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

Prayer for Mission

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

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The Episcopal Diocese of Massachusetts

Dear Brothers and Sisters,

As those responsible for the creation of our annual budget, we consider it a privilege to serve you and support the work of the Diocese of Massachusetts. We are grateful to Bishop Shaw and Bishop Harris, the Diocesan Council and Executive Committee and the diocesan staff for their work and guidance over the course of the last several months.

This proposed budget is a guide that should reflect the work that God is calling us to do. It is a financial measure of our dreams and accomplishments. And it is a reminder of our abundance as well as our limitations. As you review this budget, please consider the following premises upon which it was prepared:

- 1) Transparency—Our goal is to prepare a proposed budget that is transparent in terms of process and details.
- 2) Comprehensiveness—We have endeavored to reflect both the core and supplemental budgets as the sources of funding the work of our diocese.
- 3) Balanced—We have sought to match projected expenses with the anticipated levels of income.
- 4) Multiyear—We are making significant progress towards the presentation of both current and prior-year activity.
- 5) Level funding—The world and financial markets remain volatile. Therefore, this proposed budget is relatively similar to last year's budget. Significant changes are noted.

Working with the Rev. Canon Mally Lloyd, chief business officer Rick Strout, the Budget Committee, ministry area leaders and diocesan staff, we have prepared this proposed budget and corresponding notes to provide the basis for our financial decisions related to the operations of our diocese.

In the coming year, we will continue to insure that we maintain the highest levels of transparency in what we do. We are hopeful that there will be greater attendance at our deanery hearings so that we may hear from you throughout the process. We continue to welcome you to our monthly Budget Committee meetings at the diocesan offices at 138 Tremont Street in Boston and, as always, we welcome your feedback, comments, observations and participation.

Faithfully yours,

Ted Ts'o, Treasurer

Lisa Garcia, Chairperson, Budget Committee

Budget Overview

Process

The Budget Committee, established by Diocesan Council to help prepare the annual budget, met monthly and held six open hearings in the spring—four regional meetings about all aspects of the diocese’s finances and budget, and two to hear from representatives of strategic ministries. Attendance at the regional meetings was sparse, with two, one or no people attending who were not Budget Committee or staff members. Funding for communications, the Together Now campaign and the use of proceeds from the sale of closed churches were among the topics that surfaced at those hearings. The bishops’ funding priorities and input from staff and ministry area leaders also informed the preparation of this budget, as did the participation of Diocesan Council and the Financial Advisory Committee in discussions about budget issues and/or specific drafts.

Core and Supplemental Budgets

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

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

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

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

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

The schedules on pages 8 and 9 summarize the revenue and expenses for the 2013 diocesan core and supplemental budgets, incorporating, for revenue, the 2013 congregation assessments shown on pages 11-14 and the endowment spending policy distributions shown in appendixes 1 and 2 on pages 45 and 46, and, for expenses, the cost center allocations for 2013 shown in the tables accompanying the description of activities for the five areas of diocesan operations. These will be placed before the Diocesan Convention on November 3, 2012, for consideration and vote.

**Episcopal Diocese of Massachusetts
Summary of Budget - Core Budget**

	2013 Budget	2012 Budget	2011 Actuals
<u>Revenues</u>			
Gross assessments	4,872,043	4,722,402	5,042,398
Less: reserve for uncollectible assessments	(50,000)		
Less: adjustments from AAC	(100,000)		
Trust fund draws	685,326	666,985	619,058
Agency fund draws	826,464	811,992	815,076
Congregational contributions	50,000	50,000	21,000
Interest income	22,286	44,912	44,395
Dividend income	35,000	33,200	-
	<hr/>	<hr/>	<hr/>
Total revenue	6,341,119	6,329,491	6,541,927
<u>Expenses</u>			
Deaneries, congregations & clergy (1000's)	841,922	838,882	777,978
Congregational, resources and training (2000's)	1,117,646	1,076,292	988,719
Strategic ministries (3000's)	1,093,382	1,147,736	1,269,752
Episcopal and Diocesan support (4000's)	2,105,212	2,116,970	2,145,024
Administrative services (5000's)	1,182,957	1,149,611	1,245,705
	<hr/>	<hr/>	<hr/>
	6,341,119	6,329,491	6,427,178
Net surplus (deficit)	0	-	114,749

For more description, please see narrative beginning on page 15.

Episcopal Diocese of Massachusetts
Summary of Budget - Supplemental Budget

		2013 Budget	2012 Budget
<u>Revenues</u>			
Draw from stewardship fund	{a}	157,500	326,975
Annual fund	{b}	300,000	280,000
BDF Grants	{c}	565,319	438,082
Other contributions and grant income	{d}	693,581	351,500
<hr/>			
Total revenue		<u>1,716,400</u>	<u>1,396,557</u>

Expenses

Deaneries, congregations & clergy (1000's)		136,900	127,289
Congregational, resources and training (2000's)		80,000	147,000
Strategic ministries (3000's)		1,184,500	784,271
Episcopal and Diocesan support (4000's)		315,000	337,997
Administrative services (5000's)		-	-
<hr/>			
		<u>1,716,400</u>	<u>1,396,557</u>

Net surplus - -

{a} Draw from Stewardship/Use of Proceeds Fund

Congregational program grants - Saugus	50,000
Watertown, Good Shepherd	70,000
Belmont funds, urban resident	<u>37,500</u>
	<u>157,500</u>

{b} Annual fund allocation (gross)

Life together	105,500
Youth ministry	15,000
Urban residents	37,500
B Safe	100,000
Development (direct costs of annual fund)	<u>42,000</u>
	<u>300,000</u>

{c} BDF Grants allocation

Sabbaticals	17,500
Continuing Education	8,000
Clergy dependent scholarships	43,000
Commission on Ministry	25,000
Clergy conf dinner	10,000
Lynn	3,819
B Safe	125,000
Cathedral Church	60,000
DLT Budgeted Resources	18,000
Development department	250,000
Miscellaneous	<u>5,000</u>
	<u>565,319</u>

{d} Other contributions and grant income

Boston Cantonese fundraising	98,000
Lilly grant to fund MED	24,000
Collections from Bsp visitations	7,000
Family Camp fees	20,000
Life Together fees and revenue	486,000
Trust fund draws	8,581
Jubilee grants/fundraising	<u>50,000</u>
	<u>693,581</u>

For more description, please see narrative beginning on page 17.

**Episcopal Diocese of Massachusetts
Summary of Functional Expenses by Type**

	Core Budget					
	2013		2012		2011	
	Budget	<i>% of total</i>	Budget	<i>% of total</i>	Actual	<i>% of total</i>
Program expenses	2,343,593	37%	2,765,168	44%	2,326,337	36%
Compensation and benefits	3,027,947	48%	2,839,109	45%	2,990,613	47%
Operational and support services	1,075,160	17%	1,000,955	16%	1,082,803	17%
Management and professional services	195,419	3%	199,000	3%	308,385	5%
Total expenses	6,642,119	105%	6,804,232	108%	6,708,138	104%
Less fees and other transfers	(301,000)	-5%	(474,741)	-8%	(280,960)	-4%
Net functional expenses	6,341,119	100%	6,329,491	100%	6,427,178	100%

	Supplemental Budget					
	2013		2012		2011	
	Budget	<i>% of total</i>	Budget	<i>% of total</i>	Actual	<i>% of total</i>
Program expenses	821,400	48%	623,314	45%	927,419	49%
Compensation and benefits	722,000	42%	558,268	40%	666,211	35%
Operational and support services	173,000	10%	108,500	8%	303,116	16%
Management and professional services	-	0%	-	0%	10,421	1%
Total expenses	1,716,400	100%	1,290,082	92%	1,907,167	100%
Add other transfers		0%	106,475	8%		0%
Net functional expenses	1,716,400	100%	1,396,557	100%	1,907,167	100%

More explanation of this table, new to the budget presentation this year, will be made at the pre-Convention forums in October.

2013 PROPOSED ASSESSMENTS BY DEANERY

Key to selected columns:

M? "M" if a mission
 EFFECTIVE RATE the 2013 assessment divided by the 2013 BASE, expressed as a percent
 TRANSITION ADJUSTMENT an adjustment negotiated by this year's assessment coordinating committee

ALEWIFE

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
2010	Church of Our Saviour	Arlington	13,949	10.8%	128,708	0	8,164	7,500	5,785	
2015	St. John's Church	Arlington	23,371	12.3%	189,496	0	18,172	0	5,199	
2025	St. Paul's Church	Bedford	20,367	12.0%	170,110	0	22,590	0	-2,223	
2030	All Saints' Church	Belmont	26,528	12.6%	209,859	0	30,133	0	-3,605	
2045	St. Mark's Church	Burlington	12,251	10.4%	117,749	0	11,829	0	422	
2050	Christ Church	Cambridge	109,379	14.7%	744,385	0	116,082	0	-6,703	
2055	St. Bartholomew's Church	Cambridge	17,157	11.5%	149,402	0	15,750	0	1,407	
2060	St. James's Church	Cambridge	43,963	13.6%	322,347	0	40,555	0	3,408	
2065	St. Peter's Church	Cambridge	34,283	13.2%	259,892	0	35,377	0	-1,094	
2085	Church of Our Redeemer	Lexington	46,715	13.7%	340,102	0	54,698	0	-7,983	
2130	Christ Church	Somerville	4,317	6.5%	66,563	0	3,547	0	770	
2135	St. James's Church	Somerville	1,730	3.5%	49,876	0	2,715	0	-985	
2145	Christ Church	Waltham	18,154	11.6%	155,835	0	19,056	0	-902	
2150	Church of the Good Shepherd	Watertown	8,442	9.1%	93,175	0	7,066	0	1,376	
		TOTALS:	380,606	12.7%	2,997,499	0	385,734	7,500	-5,128	

BOSTON-HARBOR

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
4035	Church of St. Augustine & St. Martin	Boston	11,487	10.2%	112,820	0	12,844	0	-1,357	
4045	Church of St. John the Evangelist	Boston	28,511	14.8%	191,995	0	23,759	0	4,752	
4010	Church of the Advent	Boston	136,780	14.8%	921,163	0	136,032	0	748	
4025	Emmanuel Church	Boston	33,417	13.1%	254,304	0	35,978	0	-2,561	
4070 M	St. Stephen's Church	Boston	1,653	3.0%	54,710	0	693	0	960	
4075	Trinity Church	Boston	345,988	17.6%	1,961,808	0	390,038	0	-44,050	
1030	St. John's Church	Charlestown	19,502	11.9%	164,535	0	17,075	0	2,427	
4055	St. Mark's Church	Dorchester	3,083	5.3%	58,602	0	4,086	0	-1,003	
4060	St. Mary's Church	Dorchester	13,494	10.7%	125,770	0	5,183	0	8,311	
3020	St. John's Church	Jamaica Plain	20,524	12.0%	171,123	0	12,432	6,931	8,092	
4040	St. Cyprian's Church	Roxbury	13,400	10.7%	125,162	0	8,927	0	4,473	
4050	St. John St. James Church	Roxbury	8,364	9.0%	92,676	0	5,162	0	3,202	
		TOTALS:	636,203	15.0%	4,234,668	0	652,209	6,931	-16,006	

CAPE-AND-ISLANDS

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
6005	St. Mary's Church	Barnstable	55,891	14.0%	399,301	0	62,070	0	-6,179	
6010	St. Peter's Church	Buzzards Bay	12,745	10.5%	120,938	0	11,503	4,300	1,242	
6015	St. Christopher's Church	Chatham	73,191	14.3%	510,914	0	66,667	0	6,524	
6020	St. Andrew's Church	Edgartown	37,836	13.4%	282,815	0	33,147	0	4,689	
6030	St. Barnabas's Church	Falmouth	62,787	14.1%	443,789	0	67,862	0	-5,075	
6040	Christ Church	Harwich Port	35,524	13.3%	267,897	0	37,178	0	-1,654	
6045	St. Paul's Church	Nantucket	55,563	14.0%	397,186	0	52,065	0	3,498	
6050	Trinity Church	Oak Bluffs	0	0.0%	22,199	0	0	0	0	
6055	Church of the Holy Spirit	Orleans	61,798	14.1%	437,410	0	61,609	0	189	
6060	St. Peter's Church	Osterville	56,454	14.0%	402,933	0	45,898	0	10,556	
6065	Christ Church	Plymouth	40,220	13.5%	298,197	0	39,000	0	1,220	
6070	Church of St. Mary of the Harbor	Provincetown	19,827	11.9%	166,629	0	17,555	0	2,272	
6075	St. John's Church	Sandwich	38,171	13.4%	284,976	0	44,072	0	-5,901	
6095	St. David's Church	South Yarmouth	32,091	13.1%	245,753	0	27,765	0	4,326	
6080	Grace Church	Vineyard Haven	35,967	13.3%	270,755	0	34,447	0	1,520	
6085	Church of the Good Shepherd	Wareham	24,317	12.4%	195,598	0	23,241	0	1,076	
6090	St. James the Fisherman Church	Wellfleet	0	0.0%	22,192	0	0	0	0	
6025	Church of the Messiah	Woods Hole	29,958	12.9%	231,990	0	30,241	760	-283	
		TOTALS:	672,340	13.4%	5,001,472	0	654,320	5,060	18,020	

2013 PROPOSED ASSESSMENTS BY DEANERY

CHARLES-RIVER

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
3120	Parish of the Messiah	Auburndale	9,731	9.6%	101,494	0	11,365	0	-1,634	
3030	All Saints Parish	Brookline	49,786	13.8%	359,914	0	49,710	0	76	
3035	Church of Our Saviour	Brookline	43,774	13.6%	321,123	0	37,425	0	6,349	
3045	St. Paul's Church	Brookline	36,230	13.3%	272,452	0	30,487	0	5,743	
3125	Church of the Redeemer	Chestnut Hill	117,269	14.7%	795,290	0	107,570	0	9,699	
3060	St. Dunstan's Church	Dover	30,345	12.9%	234,486	0	24,277	0	6,068	
3105	Christ Church	Needham	59,905	14.1%	425,194	0	57,013	0	2,892	
3145	Trinity Church	Newton Centre Newton	37,164	13.3%	278,480	0	30,653	0	6,511	
3135	Parish of St. Paul	Highlands	22,311	12.2%	182,655	0	15,000	5,964	7,311	
3140	St. Mary's Church	Newton Lower	44,104	13.6%	323,252	0	39,301	0	4,803	
3110	Grace Church	Newton	46,460	13.7%	338,454	0	48,164	0	-1,704	
3130	St. John's Church	Newtonville	12,301	10.4%	118,073	0	14,659	0	-2,358	
3115	Church of the Good Shepherd	Waban	50,182	13.8%	362,465	0	46,867	0	3,315	
3165	St. Andrew's Church	Wellesley	124,273	14.8%	840,475	0	120,539	0	3,734	
	TOTALS:		683,835	13.8%	4,953,807	0	633,030	5,964	50,805	

CONCORD-RIVER

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
2005	Church of the Good Shepherd	Acton	35,156	13.2%	265,527	0	35,849	0	-693	
2020	St. Andrew's Church	Ayer	16,648	11.4%	146,117	0	12,789	0	3,859	
2075	Trinity Church	Concord	94,875	14.6%	650,811	0	92,327	0	2,548	
3065	St. Andrew's Church	Framingham	37,158	13.3%	278,445	0	37,498	0	-340	
3075	St. Michael's Church	Holliston	18,694	11.7%	159,320	0	16,907	2,000	1,787	
3080	St. Paul's Church	Hopkinton	20,591	12.0%	171,558	0	13,137	0	7,454	
2080	St. Luke's Church	Hudson	4,966	7.0%	70,750	0	4,278	0	688	
2090	St. Anne's in-the-Fields Church	Lincoln	77,372	14.4%	537,885	0	69,126	0	8,246	
3100	St. Paul's Church	Natick	51,000	13.9%	367,743	0	54,611	0	-3,611	
2120 M	St. David's Mission	Pepperell	1,117	2.3%	49,521	0	1,364	0	-247	
2125	Trinity Chapel	Shirley	3,111	5.3%	58,781	0	4,727	0	-1,616	
3155	St. Mark's Church	Southborough	36,910	13.3%	276,844	0	33,064	0	3,846	
2140	St. Elizabeth's Church	Sudbury	48,734	13.8%	353,126	0	39,236	0	9,498	
2155	Church of the Holy Spirit	Wayland	29,231	12.9%	227,298	0	24,935	5,644	4,296	
2165	St. Peter's Church	Weston	67,618	14.2%	474,958	0	63,494	0	4,124	
	TOTALS:		543,181	13.3%	4,088,684	0	503,342	7,644	39,839	

MERRIMACK-VALLEY

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
1005	St. James's Church	Amesbury	12,741	10.5%	120,913	0	13,293	0	-552	
1010	Christ Church	Andover	79,819	14.4%	553,676	0	79,338	0	481	
2070	All Saints' Church	Chelmsford	26,409	12.6%	209,095	0	29,752	0	-3,343	
1055	St. James's Church	Groveland	12,214	10.4%	117,516	7,530	12,878	0	-664	
1065	Trinity Church	Haverhill	33,183	13.1%	252,797	0	25,793	8,000	7,390	
1075	Grace Church	Lawrence	14,610	11.0%	132,969	0	12,000	6,065	2,610	
2095	St. Anne's Church	Lowell	20,172	11.9%	168,858	0	9,651	0	10,521	
2100	St. John's Church	Lowell	2,636	4.7%	55,717	0	2,514	0	122	
1125	St. Andrew's Church	Methuen	3,572	5.8%	61,755	0	2,988	0	584	
1130	St. Paul's Church	Newburyport	37,617	13.4%	281,401	0	38,472	0	-855	
1135	St. Paul's Church	North Andover	26,162	12.6%	207,501	0	26,864	0	-702	
2040	St. Anne's Church	North Billerica	21,674	12.1%	178,547	0	20,461	0	1,213	
1195 M	All Saints' Church	West Newbury	0	0.0%	8,037	0	3,057	0	-3,057	
2160	St. Mark's Church	Westford	9,103	9.3%	97,440	0	9,133	0	-30	
	TOTALS:		299,912	12.3%	2,446,222	7,530	286,194	14,065	13,718	

2013 PROPOSED ASSESSMENTS BY DEANERY

MOUNT-HOPE-BUZZARDS-BAY

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
5030	Church of the Good Shepherd	Fairhaven	0	0 0%	28,720	0	0	0	0	
5035	Church of the Holy Spirit	Fall River	31,625	13 0%	242,742	0	36,036	0	-4,411	
5045	St. Luke's Church	Fall River	0	0 0%	37,856	0	0	0	0	
5070	St. Gabriel's Church	Marion	41,991	13.6%	309,620	0	41,520	0	471	
5080	Grace Church	New Bedford	79,694	14.4%	552,870	0	82,300	0	-2,606	
5085	St. Andrew's Church	New Bedford	4,378	6 5%	66,959	0	6,940	0	-2,562	
5090	St. Martin's Church	New Bedford	6,786	8 2%	82,491	0	5,788	0	998	
5110	Church of Our Saviour	Somerset	11,803	10 3%	114,863	0	8,896	2,437	2,907	
5020	St. Peter's Church	South Dartmouth	5,736	7.6%	75,719	0	4,600	8,086	1,136	
5115	Christ Church	Swansea	22,384	12 2%	183,126	0	22,896	0	-512	
	TOTALS:		204,397	12.1%	1,694,966	0	208,976	10,523	-4,579	

MYSTIC-VALLEY

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
1035 M	St. Luke's/San Lucas Church	Chelsea	5,855	6.1%	95,372	0	2,711	2,521	3,144	
1025 M	Grace Church Federated	East Boston	0	0 0%	1,312	0	0	0	0	
1045	Grace Church	Everett	6,331	8 0%	79,557	0	3,899	0	2,432	
1095	St. Paul's Church	Lynnfield	20,256	12 0%	169,399	0	21,650	0	-1,394	
1105	St. Paul's Church	Malden	8,456	9.1%	93,270	0	17,320	0	-8,864	
2115	Grace Church	Medford	31,315	13 0%	240,742	0	22,852	0	8,463	
1120	Trinity Parish	Melrose	22,878	12 3%	186,311	0	22,756	0	122	
1145	Church of the Good Shepherd	Reading	26,474	14.6%	181,051	0	22,062	0	4,412	
1170	St. John's Church	Saugus	13,397	10.7%	125,146	0	11,424	0	1,973	
1175	All Saints' Church	Stoneham	3,108	5 3%	58,766	0	2,665	0	443	
1190	Emmanuel Church	Wakefield	15,874	11 2%	141,123	0	12,180	4,058	3,694	
2170	St. Elizabeth's Church	Wilmington	4,812	6 9%	69,759	0	2,346	0	2,466	
2175	Parish of the Epiphany	Winchester	84,086	14 5%	581,200	0	86,642	0	-2,556	
1200	St. John's Church	Winthrop	8,862	9 2%	95,888	0	8,590	0	272	
2180	Trinity Church	Woburn	4,276	6.4%	66,297	0	4,384	0	-108	
	TOTALS:		255,980	11.7%	2,185,193	0	241,481	6,579	14,499	

NEPONSET-RIVER

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
4085	Trinity Church	Canton	16,384	11 3%	144,414	0	15,797	0	587	
3050	Church of the Good Shepherd	Dedham	7,504	8.6%	87,125	0	7,991	0	-487	
3055	St. Paul's Church	Dedham	40,280	13 5%	298,587	0	41,224	0	-944	
4015	Parish of All Saints	Dorchester	48,616	13 8%	352,366	0	47,513	0	1,103	
3005	Christ Church	Hyde Park	0	0 0%	(7,941 00)	0	14,136	0	-14,136	
3015 M	Iglesia de San Juan	Hyde Park	0	0 0%	11,000	0	0	0	0	
4030	Church of the Holy Spirit	Mattapan	22,822	12 3%	185,950	0	17,279	0	5,543	
3085	Church of the Advent	Medfield	24,737	12 5%	198,307	0	23,962	0	775	
3090	Christ Church	Medway	5,483	7.4%	74,088	0	2,788	0	2,695	
4130	St. Michael's Church	Milton	61,761	14.1%	437,172	0	59,794	0	1,967	
3150	Grace Church	Norwood	10,600	9 9%	107,098	0	15,088	0	-4,488	
5105	St. John's Church	Sharon	585	1.4%	42,486	0	0	0	585	
4160	Trinity Church	Stoughton	7,861	9.7%	80,978	0	6,551	0	1,310	
3160	Epiphany Church	Walpole	19,905	11 9%	167,130	0	19,451	0	454	
3010	Emmanuel Church	West Roxbury	5,038	7.1%	71,217	0	4,958	0	80	
3170	St. John's Church	Westwood	22,507	12 2%	183,920	0	17,100	0	5,407	
	TOTALS:		294,083	12.1%	2,433,897	0	293,632	0	451	

2013 PROPOSED ASSESSMENTS BY DEANERY

NORTH-SHORE

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
1015	St. John's Church	Beverly Farms	71,930	14.3%	502,778	0	77,409	0	-5,479	
1021	St. Peter's Church	Beverly	29,864	12.9%	231,387	0	30,234	0	-370	
1041	Calvary Church	Danvers	15,446	11.2%	138,364	0	15,929	0	-483	
1050	St. John's Church	Gloucester	29,227	12.9%	227,273	0	35,564	0	-6,337	
1070	Ascension Memorial Church	Ipswich	27,105	12.7%	213,585	0	33,152	0	-6,047	
1090	St. Stephen's Memorial Episcopal Church	Lynn	31,297	13.0%	240,627	0	31,805	0	-508	
1116	St. Michael's Church	Marblehead	35,232	13.2%	266,018	0	35,425	0	-193	
1110	Wyman Memorial Church of St. Andrew	Marblehead	34,292	13.2%	259,954	0	35,942	0	-1,650	
1140	St. Paul's Church	Peabody	6,838	8.3%	82,831	0	6,089	2,700	749	
1155	St. Mary's Church	Rockport	18,058	11.6%	155,217	0	18,180	0	-122	
1160	Grace Church	Salem	26,025	12.6%	206,615	0	27,643	0	-1,618	
1165	St. Peter's Church	Salem	17,682	11.6%	152,793	0	17,892	0	-210	
1060	Christ Church	South Hamilton	53,084	13.9%	381,193	0	52,000	78,424	1,084	
1180	Church of the Holy Name	Swampscott	15,642	11.2%	139,632	0	15,066	0	576	
1185	Trinity Church	Topsfield	29,196	12.9%	227,075	0	29,018	0	178	
	TOTALS:		440,918	12.9%	3,425,342	0	461,348	81,124	-20,430	

SOUTH-SHORE

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
4080	Emmanuel Church	Braintree	10,205	9.8%	104,553	0	9,142	0	1,063	
4090	St. Stephen's Church	Cohasset	50,251	13.8%	362,913	0	47,391	0	2,860	
4095	Church of St. John the Evangelist	Duxbury	20,306	12.0%	169,722	0	47,630	0	-27,324	
4100	St. Andrew's Church	Hanover	18,775	11.7%	159,840	0	19,145	0	-370	
4105	Parish of St. John the Evangelist	Hingham	66,858	14.2%	470,053	0	55,873	0	10,985	
4110	St. John's Church	Holbrook	5,664	7.5%	75,254	0	4,544	0	1,120	
4120	Trinity Church	Marshfield	16,691	11.4%	146,395	0	16,084	0	607	
4125	Church of Our Saviour	Milton	14,078	10.9%	129,538	0	13,502	0	576	
4135	Christ Church	Quincy	19,699	11.9%	165,805	0	15,202	0	4,497	
4140	Parish of St. Chrysostom	Quincy	20,735	12.0%	172,490	0	15,500	10,303	5,235	
4145	Trinity Church	Randolph	6,206	7.9%	78,750	0	12,065	0	-5,859	
4150	Trinity Church	Rockland	4,384	6.5%	66,994	0	2,436	0	1,948	
4155	St. Luke's Church	Scituate	29,880	12.9%	231,489	0	29,527	0	353	
4165	Church of the Holy Nativity	South Weymouth	13,795	10.8%	127,711	0	13,547	0	248	
4170	Trinity Church	Weymouth	4,547	6.7%	68,047	0	5,261	0	-714	
5130	All Saints' Church	Whitman	10,874	10.0%	108,866	0	11,426	0	-552	
	TOTALS:		312,948	11.9%	2,638,420	0	318,275	10,303	-5,327	

TAUNTON-RIVER

M?	CHURCH	LOCATION	2013		2013 BASE	ADJUSTMENT	2012		Difference	Comment
			FORMULA ASSESSMENT	EFFECTIVE RATE			Assessment	Adjustments		
5005	All Saints' Church	Attleborough	4,423	6.6%	67,247	0	3,178	2,000	1,245	
5010	Trinity Church	Bridgewater	7,538	8.6%	87,343	0	7,726	0	-188	
5060	St. Mark's Church	Foxborough	26,299	12.6%	208,382	0	24,909	0	1,390	
3070	St. John's Church	Franklin	7,418	8.6%	86,573	0	5,104	0	2,314	
5065	Church of St. John the Evangelist	Mansfield	3,957	6.2%	64,242	0	2,777	0	1,180	
5075	Church of Our Saviour	Middleborough	23,444	12.3%	189,962	0	25,011	0	-1,567	
5095	Grace Church	Attleborough	21,296	12.1%	176,108	0	20,871	0	425	
5025	St. Mark's Church	North Easton	0	0.0%	38,260	0	439	0	-439	
5120	St. John's Church	Taunton	5,227	7.2%	72,438	0	3,679	0	1,548	
5125	St. Thomas's Church	Taunton	28,713	12.8%	223,961	0	22,564	0	6,149	
3175	Trinity Church	Wrentham	19,325	11.8%	163,389	0	17,603	0	1,722	
	TOTALS:		147,640	10.7%	1,377,905	0	133,861	2,000	13,779	

TOTAL ASSESSMENTS BILLED: 4,872,043 13.0% 37,478,075 7,530 4,772,402 157,693 99,641

less RESERVES: (50,000)

ASSESSMENTS (less reserves): 4,822,043

Projected Revenue for 2013

Assessments and Adjustments and Reserves

The 2013 assessment formula, approved by the Diocesan Council, remains unchanged from 2010, 2011 and 2012:

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

where the BASE for 2013 is equal to line 14 ("all other operating expenses") from the 2010 parochial report, less line 7 ("assistance from diocese").

For a mission, the 2013 assessment is two-thirds the amount that would be assessed if the congregation were a parish.

This assessment formula together with the parochial report data for 2010 generates a gross assessment for 2013 of \$4,872,043. Again this year the Diocesan Council created an Assessment Coordinating Committee, whose adjustments to the assessments of eight congregations totaled \$39,283, below its authorized cap of \$100,000, as follows:

- St. Chrysostom's Church, Quincy: \$5,235
- All Saints' Church, Attleboro: \$1,023
- St. Paul's Church, Lynnfield: \$3,100
- Trinity Church, Haverhill: \$6,000
- Parish of the Messiah, Auburndale: \$3,500
- Church of Our Saviour, Arlington: \$5,000
- St. Mark's Church, Foxboro: \$14,000
- St. Luke's/San Lucas, Chelsea: \$1,425

However, despite coming in below the \$100,000 authorized cap, we have chosen to keep the deduction from assessments revenue at \$100,000 for the purposes of this budget. In sum, the total value of assessments (after adjustments) to be billed in 2013 is \$4,832,760, less a reserve for uncollectible assessments (\$50,000) and the balance of the Assessment Coordinating Committee's allocation (\$60,627) for a total projected income from assessments of \$4,722,043. Revenue also reflects \$50,000 in projected voluntary contributions from congregations not subject to the assessment.

Net Revenue from Investments

Almost 24% of core budget revenue comes in the form of spending policy draws from investments, either owned directly by the diocese (including our endowment funds), or owned by others (usually the Trustees of Donations) in trust for the benefit of the diocese. Some funds, whether owned by the diocese or by a trust, place no restriction on the diocese regarding the use of the income provided through the spending policy draws. The unrestricted funds represent about 30% of the available spending policy income. The remaining funds have some restriction on the use of the spending policy income, but in most cases the restriction is consistent with the regularly anticipated expenses of the diocese. There are a few funds, however, where the restrictions call for close monitoring and measurement.

Spending Policy – Trusts

The appendix table on page 46 lists the trusts owned and managed by the Trustees of Donations for the benefit of the diocese. In 2013 the Trustees 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 2009 through June 2012.

There are a few funds with restrictions that require the Trustees to deviate from the general spending policy formula. In some cases, the distribution is limited to actual income produced by the fund, and in other cases, all income must be reinvested for the time being. The table of projected trust income for these funds is an estimate of the income that will be available in 2013.

The total spending policy income available in 2013 (\$685,326) is little changed from 2012 (\$666,985). This is because three-year average market values are roughly the same for the two overlapping periods.

Spending Policy – Endowments (Agency Funds)

The appendix table on page 45 lists the endowments owned by the diocese and managed primarily by the Trustees of Donations. These include some funds that are unrestricted and others that have some restriction on their use; these restrictions may have been placed by a donor or by a past Diocesan Council.

The proposed spending policy for 2013 is similar to that adopted by the Trustees of Donations: to draw 4% of a base that reflects the average of the market value over the past three years, adjusted for withdrawals from and additions to principal.

In February 2011 the Diocesan Council established the Fund for Congregational Vitality from half of the net proceeds from closed congregations, and indicated its intention to take a normal spending policy draw from this fund in 2012 and following years. This new fund has about \$2.25 million in it, supporting a spending policy draw of approximately \$109,000.

This brings the total spending policy income shown in the 2013 core budget to \$826,464, about \$15,000 more than in 2012.

Spending Policy and Core Revenue

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

The Financial Advisory Committee reaffirms its support of a 4% spending policy draw from diocesan endowment funds to support the 2013 core budget. (The value of each fund for the purpose of calculating the draw is based on the 36 month average, from July 2009 to June 2012, of end of month market value, adjusted for additions and withdrawals.)

The Financial Advisory Committee further strongly recommends that the Diocesan Council undertake extensive review of an appropriate target draw in view of the current and projected market conditions and establish a plan to achieve an appropriate long-term target draw.

It is no longer clear that setting the target at a 4% draw continues to be sustainable over the long term, given the current market conditions. In the same way that we seek an assessment formula that is sustainable year in and year out, the core spending policy should be similarly sustainable.

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

A notable supplemental draw was the payment to the Cathedral Church of St. Paul in 2009 for the diocesan share of HVAC renovations. This payment of about \$1 million effectively reduced future core spending policy revenue by \$40,000 each year thereafter.

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

It is possible that some future supplemental draw on the endowment could be needed if actual diocesan operations run at a significant deficit. Ideally, setting sufficient levels of reserves for adverse outcomes and maintaining strong financial controls throughout the year will prevent this type of supplemental draw.

Dividend and Interest Income

More than 40 years ago the diocese received a gift of stock with the request that it not be sold. The dividend income for 2013 is projected to be \$35,000. The inclusion of \$22,286 in interest income represents the income to be earned and collected on a mortgage extended to the bishop suffragan, and a note to one clergyperson (taken on by the diocese to facilitate a parish transition). The decrease in interest income results from the pay-off of the mortgage of the senior bishop suffragan at his retirement. The proceeds from the pay-off were repatriated into the diocesan operating endowment. The outstanding mortgage and clergy loan are fixed rate notes with an interest rate of 5.2%.

The diocesan portfolio also includes loans to congregations (separate from those made through the Stokes Fund loan program). Two loans are significantly in default; each congregation is behind at least several years in payments. If the diocese began to receive payments from these loans, the projected interest income and fees would be recorded as income here in the budget. The congregations and amounts outstanding are:

- St. David's Church, Pepperell (outstanding amount: \$38,935)
- St. Elizabeth's Church, Wilmington (outstanding amount: \$6,193)

A third congregation, Grace Church, North Attleborough, has entered into an agreement with the Diocesan Council and has begun repayment of its outstanding loan amount of \$385,393. Payments will be recorded as a reduction of existing assets.

Supplemental Budget Revenue

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

{a} The Stewardship Fund (Use of Proceeds from Sales of Closed Parishes): The 2013 draw will be \$157,500 to cover congregational grants and half an urban resident grant. The 2012 budget drew \$326,975 from this fund. See the table on page 41 for further information.

{b} The Annual Fund: Estimates put the 2013 Annual Fund at \$300,000 to cover strategic ministries serving children, youth and young adults. With \$42,000 needed to cover the direct costs of the Annual Fund, \$258,000 is likely to be available for Annual Fund grants in 2013. The 2012 Annual Fund appeals are budgeted at \$280,000.

{c} Bishop's Discretionary Fund (BDF) Grants: These are trust funds held by the Trustees of Donations where the bishop and the diocese are named as income beneficiaries; some are restricted in use and some are not. The generosity of past donors and the diocesan bishop make it possible to fund new ventures in mission and strategic ministries through the supplemental budget. In 2013 the draw, along with use of prior years' surplus, is set at \$565,319 for clergy support and development (from restricted funds), the Development Office and various strategic ministries; in 2012 the draw was \$438,082. If the Annual Fund comes in above \$300,000, then the draw from the BDF will be reduced so the surplus is not further depleted.

Of the many funds owned by the Trustees of Donations, 34 funds with a market value of about \$15.1 million are for the benefit of the diocesan bishop, and the Trustees provide him with an annual spending policy from these trusts. Bishop Shaw has historically used the bulk of this income to support pilot programs and new initiatives and to supplement strategic ministries. His grants are an important source of funding for the supplemental budget. Planned expenditures over the past few years have brought prior years' surplus levels down; for the purpose of creating a realistic supplemental budget, the diocese may expect \$396,319 in 2013 grants from unrestricted funds.

In addition, there are some restricted funds from which Bishop Shaw intends to make BDF grants to the diocese, and these total \$169,000.

{d} Other contributions and grants: Fundraising by the Cantonese and Jubilee ministries, grants and fees make up this category. In 2013 the budget amounts to \$723,581; in 2012 it was budgeted at \$351,500.

Real Property Spending Policy

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

This, however, is an exceptional case; both the total size of the Life Together program in the second half of 2013, and the location of the interns' housing, has not been decided yet. In the subsequent discussion of the Life Together program (see page 28), the annual value of the use of this property is estimated at \$75,000; to offset that expense, this line shows an in-kind spending policy revenue from the use of the property.

The Structure of Diocesan Operations

The 2009 budget, presented four years ago, introduced a new organizational structure for diocesan operations. The structure has five functional areas and a diocesan leadership team, with the canon to the ordinary as the chief of staff. Three of the stated objectives of the reorganization were accountability, definition and comparison:

- the canon to the ordinary is responsible for the management of diocesan operations;
- the controls on the operations are implemented through the five functional areas; and,
- financial records easily track the full resources applied to each individual component of mission strategy implementation.

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

The **Congregational Resources and Training** area includes grant programs, events, training and communications. Communications is budgeted for expansion in 2013, and a new administrator for the grants program will be hired to support the congregational resources and training director as the green grants and mission tithe grants programs expand under the Together Now campaign funding.

The **Episcopal and Diocesan Support** area, which contains the governance, canonical, ecumenical and development functions, has grown again this year as the work for the \$20-million Together Now campaign has continued (see page 42 for more campaign information). The diocesan leadership team—the two bishops and the canon to the ordinary—have broad shared oversight responsibilities for all diocesan operations, assisted by a senior staff with specific functional responsibilities and directed by the canon to the ordinary.

The **Deaneries, Congregations and Clergy** area is still in transition. Bishop Cederholm has retired, a canon for congregations has been hired and a congregational development team, along with others from around the diocese, the province and the wider church, is working across areas to promote parish vitality and viability.

Projected Expenses for 2013 by Areas of Operation

Guide to Area Expense Tables

The proposed expense budgets for each of the five areas of diocesan operations are described in this section. For each area, there are two pages, one for the core budget and one for the supplemental budget. Each page has two tables: 2011 actuals (top) and the 2013 proposed budget (bottom). The far right-hand column is the 2012 budget. Each row represents a specific cost center (CC) within the area. There are up to 10 columns of figures that include a variety of budgeted and actual expenses. The first row in each area is staff compensation.

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

Compensation and Benefits: All compensation and benefit-related expenses, including 1099 payments

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

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

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

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

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

Transfer: A way to shift expenses from one cost center to another

2012 Budget: The 2012 budget, for comparison purposes

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

The total 2013 budget for this area is \$978,822, with \$841,922 in the core budget and \$136,900 in the supplemental budget. The 2012 core budget total was \$838,882; one increase in the core budget is a new initiative for the Commission on Ministry to fund seminarians whose first language is not English. At the same time, \$20,000 in support for retired clergy (1231) was taken out of the core budget and recorded in the proper agency (see note for cost center 1231 below).

Deaneries, Congregations and Clergy: 1000 - Core

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

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

\$500 per deanery to support deanery assembly activities; \$4,000 per deanery to offset deans' time and expense; and, \$10,000 to provide hospitality for Confirmations.

Congregations: 1101 - Core & Supplemental

The \$8,000 in the core budget funds the congregational business consultants program. The \$24,000 in the supplemental budget is the projected amount of Making Excellent Disciples grants, funded by the Lily Foundation.

Transition Ministries: 1111 - Core

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

Clergy: 1201 - Core

\$4,000 for support of the two archdeacons.

Sabbaticals: 1211 - Core & Supplemental

\$17,500 funded from the Bishop's Discretionary Fund in the supplemental budget, and \$7,431 from a restricted trust fund in the core budget.

Continuing Education: 1212 - Supplemental

\$8,000 funded from the Bishop's Discretionary Fund.

MSASA EDS: 1213 - Core

\$9,365 is the spending policy income available for a scholarship program for students from Africa attending Episcopal Divinity School.

Clergy Dependent Scholarships: 1221 - Supplemental

\$43,000 from the Bishop's Discretionary Fund.

Dill Campership: 1223 - Supplemental

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

Support for Retired Clergy: 1231 - Core

\$5,000 is for program and support expenses for retired clergy, including gatherings. The spending policy draw on a fund owned by the diocese, with income to be granted to both 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 has been moved off the diocesan budget and into the budget of these agencies.

Commission on Ministry: 1311 - Core & Supplemental

\$41,000 in the core budget (down \$9,000 from last year) for the regular program costs, and, at the bishop's request, \$50,000 for the Commission on Ministry's priority to fund seminarians whose first language is not English, half from the core budget and half from the supplemental.

Seminarians: 1312 - Core & Supplemental

Scholarships for seminarians in the ordination process—\$45,460 is the spending policy income from a fund for this purpose, supplemented by an estimated additional \$7,000 to be raised through bishops' visitations to congregations.

Fresh Start Program: 1321 - Core

An increase of \$3,000 to \$10,000 in 2013, based on 2011 actuals.

Diaconate Program: 1331 - Core

The full cost of running the diaconate program is down \$2,000 from 2012 to \$13,000, based on projections.

Clergy Family Network: 1341 - Core

\$1,500 in the core budget, based on 2011 actuals.

Pre-Lenten Retreat: 1411 - Core

Net costs to the core budget, after fees are budgeted at \$2,000, based on 2011 actuals.

Clergy Conference: 1421 - Core & Supplemental

This three-day event is budgeted at \$106,000, of which \$71,000 is covered by attendee fees and \$10,000 by the supplemental budget; the balance is covered by the core budget.

Clergy Day: 1431 - Core

Clergy Day at the Barbara C. Harris Camp and Conference Center is budgeted at \$7,000, of which \$5,000 is covered by fees, leaving a core budget balance of \$2,000.

Deaneries, Congregations & Clergy
2013 Core Budget

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actual								
CC1000 DC & C	-	508,904	420	-	-	-	-	509,324
CC1001 Deaneries	36,333	-	4,167	-	-	-	-	40,500
CC1002 Deans	12,545	-	428	-	-	-	-	12,973
CC1003 Deanery Confirmations	-	-	-	-	-	-	-	-
CC1021 Deaneries, Cong. & Clergy	25	-	995	-	-	-	-	1,020
CC1101 Congregations	-	-	3,773	-	-	-	-	3,773
CC1111 Transition Ministries	877	-	11,390	-	-	-	-	12,267
CC1201 Clergy	38	-	301	4,256	(110)	-	-	4,485
CC1211 Sabbaticals	24,000	-	-	-	-	-	-	24,000
CC1212 Continuing Education	5,977	-	851	-	-	-	-	6,828
CC1213 MSASA EDS	11,000	59	-	-	-	-	-	11,059
CC1231 Support for Retired Clergy	-	1,200	3,457	-	-	-	-	4,657
CC1311 Commission on Ministry	1,395	3,139	30,102	9,021	(8,480)	-	-	35,177
CC1312 Seminararians	44,000	-	-	-	-	-	-	44,000
CC1321 Fresh Start Program	-	350	9,839	-	-	-	-	10,189
CC1331 Diaconate Program	161	8,300	10,578	1,040	(812)	-	-	19,267
CC1341 Clergy Family Network	1,500	-	35	-	-	-	-	1,535
CC1411 Pre Lenten Retreat	119	-	9,413	68	(7,730)	-	-	1,870
CC1421 Clergy Conference	5,216	500	99,652	581	(70,252)	-	-	35,697
CC1431 Clergy Day	-	-	5,008	54	(5,705)	-	-	(643)
Totals	143,186	522,452	190,409	15,020	(93,089)	-	-	777,978

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2012 Budget								
CC1000 DC & C	-	555,966	4,200	-	-	-	-	559,155
CC1001 Deaneries	1,800	-	-	-	-	-	-	6,000
CC1002 Deans	48,000	-	-	-	-	-	-	48,000
CC1003 Deanery Confirmations	10,000	-	-	-	-	-	-	12,000
CC1101 Congregations	-	-	8,000	-	-	-	-	8,000
CC1111 Transition Ministries	-	-	13,000	4,000	-	-	-	14,000
CC1201 Clergy	-	-	-	-	-	-	-	3,000
CC1211 Sabbaticals	7,431	-	-	-	-	-	-	7,431
CC1213 MSASA EDS	9,365	-	-	-	-	-	-	9,365
CC1231 Support for Retired Clergy	-	1,200	4,000	-	-	-	-	5,200
CC1311 Commission on Ministry	32,000	3,000	31,000	9,000	(9,000)	-	-	66,000
CC1312 Seminararians	45,460	-	-	-	-	-	-	45,460
CC1321 Fresh Start Program	-	4,000	10,000	1,000	-	-	-	15,000
CC1331 Diaconate Program	-	-	8,000	-	-	-	-	8,000
CC1341 Clergy Family Network	1,500	-	9,100	-	(7,100)	-	-	2,500
CC1411 Pre Lenten Retreat	-	1,000	105,000	-	(71,000)	-	-	2,000
CC1421 Clergy Conference	-	-	7,000	-	(5,000)	-	-	2,000
CC1431 Clergy Day	-	-	-	-	-	-	-	2,000
Totals	155,556	565,166	199,300	14,000	(92,100)	-	-	838,882

**Deaneries, Congregations & Clergy
2013 Supplemental Budget**

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Total Expenses</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actuals									
CC1101 Congregations	27,975	-	84	-	28,059	-	-	(28,059)	-
CC1221 Clergy Dependent Scholarships	43,000	-	-	-	43,000	-	(43,000)	-	-
Totals	70,975	-	84	-	71,059	-	(43,000)	(28,059)	-
2013 Budget									
CC1101 Congregations	24,000	-	-	-	24,000	(24,000)	-	-	24,000
CC1211 Sabbaticals	17,500	-	-	-	17,500	-	(17,500)	-	45,000
CC1212 Continuing Ed	8,000	-	-	-	8,000	-	(8,000)	-	10,000
CC1223 DIII Campership	2,400	-	-	-	2,400	(2,400)	-	-	2,551
CC1221 Clergy Dependent Scholarships	43,000	-	-	-	43,000	-	(43,000)	-	41,763
CC1231 Support for Retired Clergy	-	-	-	-	-	-	-	-	5,000
CC1311 Commission on Ministry	25,000	-	-	-	25,000	-	(25,000)	-	-
CC1312 Seminars	7,000	-	-	-	7,000	(7,000)	-	-	7,000
CC1421 Clergy Conference	-	-	10,000	-	10,000	-	(10,000)	-	11,975
Totals	126,900	-	10,000	-	136,900	(33,400)	(103,500)	-	147,289

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

The total 2013 budget for this area is \$1,197,646, with \$1,117,646 in the core budget and \$80,000 in the supplemental budget. The 2012 core budget total was \$1,076,292.

Congregational Resources and Training: 2000 - Core

The total compensation and benefits costs for the six staff members in this area are \$355,074 (see roster on page 53). Eighty-five percent of the compensation costs for the staff member who works closely with congregations during the closing process is ultimately reimbursed from the closing proceeds. A new position, grants administrator and support to the congregational development team, is being partially funded from the Together Now campaign and partially from the Congregational Resources and Training core budget to administer the overall diocesan and campaign grants which total \$880,000 per year, and to provide administrative support to the congregational development team, especially in the area of event planning.

Congregational Development Grants: 2011, 2012 - Core

The amounts for the two congregational development grant programs remain the same, at \$200,000 for the open grants and \$70,000 in targeted grants.

Bristol County Case Grants: 2013 -Core

The draw for this grant program is \$111,707. The intended uses of the fund's income when it was established as part of the diocesan endowment include service to Bristol County residents in need, as well as the general and religious purposes of the diocese.

Congregational Program Grants: 2014 - Supplemental

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

Deaf Ministry Grants: 2015 - Core

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

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

Each of the 12 deaneries is charged with running a grants program to support outreach activities. Deanery assemblies set the criteria and determine awards. The amounts available to each deanery, funded by two specific diocesan funds, are \$4,000 for Sending Serving grants (open to any outreach activity) and \$2,300 for House of Mercy grants (requiring a focus on women and children in need).

Hispanic Ministries: 2031 - Core

The 2013 budget for this grant program to support Hispanic ministries in congregations is \$25,000. An additional \$10,000 pays for the Hispanic missionary.

Green Grants and Loans: 2052 - Comprehensive Campaign

The 2013 green grants and loan program (see appendix 3) will be funded through the Together Now comprehensive campaign (see page 42).

Spring Learning Event: 2112 - Core

In the spring of 2013, five local area learning events will focus on mission and ministry through the

programs of the Together Now campaign. The core budget for 2013 is \$13,700, with \$3,700 in participant fees, for a net expense of \$10,000.

Resource Day: 2113 - Core

The total cost of Resource Day is \$11,500, \$1,500 of which is offset by fees collected.

CRT Support: 2200 - Core

In the 2012 budget, this line, totaling \$86,166, comprised cost center codes 2131 through 2231. For 2013, specific budget amounts have been assigned to each line for a total of \$99,100. Allocations are based on 2011 actuals.

Congregational Resources and Training Workshops: 2131 - Core

A net of \$17,000 for the various workshops offered throughout the diocese.

Antiracism: 2132 - Core

A net of \$1,500 for trainings, raising awareness and education.

Safe Church: 2133 - Core

A net of \$6,000 for trainings, online and in person.

Resource Center: 2151 - Core

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

Consultants and Coaches: 2161 - Core

\$12,800 for congregational consultants and coaches, and their expenses. They help with best practices in many areas including: finances, buildings, leadership and stewardship.

Practice Areas: 2171 - Core

\$500 for retreats and other programs.

Congregational Resources and Training Support: 2200 - Core

\$33,000, of which \$32,000 is level funding in support of the Leadership Development Initiative.

Congregational Support: 2211 - Core

Much of this total of \$17,000 is legal fees.

Program Support: 2221 - Core

A net of \$10,000 covers various workshop trainers' fees.

Family Camp: 2222 - Supplemental

Family Camp is a break-even operation.

Committee Support: 2231 - Core

\$700 to provide hospitality and support for diocesan committees.

Communications: 2311, 2312, 2313 - Core

The total budget is \$142,800 to support the expanding work of the Office of Communications, including hiring a second communications staff person.

Closed Congregations: 2901 -

The costs associated with the closings have been moved out of Congregational Resources and Training. They are located in a non-operating functional area (see pages 40 and 41).

**Congregational Resources & Training
2013 Core Budget**

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mot and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actuals								
CC2000 CR & T	-	348,080	2,401	-	-	-	-	350,481
CC2011 Cong Dev Open Grants	225,349	-	108	299	-	-	-	225,756
CC2012 Cong Dev Targeted Grants	84,105	-	2	-	-	-	-	84,107
CC2013 Bristol County Case Fund Grants	138,350	-	-	-	-	-	-	138,350
CC2015 Deaf Ministry Grants	2,400	-	-	-	-	-	-	2,400
CC2021 Sending Serving Grants	24,948	-	1	-	-	-	-	24,949
CC2022 House of Mercy Grants	18,500	-	-	-	-	-	-	18,500
CC2031 Hispanic Ministries	22,000	-	68	-	-	-	-	22,068
CC2052 Green Grants & Loans	-	1,500	11	-	-	-	-	11
CC2112 Spring Learning Event	4,885	-	1,125	-	(3,560)	-	-	3,950
CC2113 Resource Day	8,920	-	338	2	(1,280)	-	-	7,980
CC2131 CRT Workshops	17,901	-	757	28	(2,000)	-	-	16,686
CC2132 Anti-Racism	767	-	544	-	(450)	-	-	861
CC2133 Safe Church	-	5,182	3,316	-	(2,764)	-	-	5,734
CC2151 Resource Center	87	-	658	-	-	-	-	745
CC2161 Consultants and Coaches	364	4,290	6,408	-	(728)	-	-	10,334
CC2171 Practice Areas	466	-	6	1	(210)	-	-	263
CC2200 CRT Support	4,000	-	1,326	-	-	-	-	5,326
CC2211 Congregation Support	2,000	-	3,356	11,844	-	-	-	17,200
CC2221 Program Support	11,078	1,755	745	55	(4,520)	-	-	9,113
CC2231 Committee Support	-	-	740	-	-	-	-	740
CC2311 Diocesan Communications	4,607	3,856	19,972	13,200	(1,057)	-	-	40,578
CC2312 FYI Newsletter	-	-	2,391	-	(50)	-	-	2,341
CC2313 Episcopal Times	-	-	246	-	-	-	-	246
Totals	570,727	364,663	44,519	25,429	(16,619)	-	-	988,719

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mot and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2013 Budget								
CC2000 CR & T	-	355,074	-	-	-	-	-	355,074
CC2011 Cong Dev Open Grants	200,000	-	-	-	-	-	-	200,000
CC2012 Cong Dev Targeted Grants	70,000	-	-	-	-	-	-	70,000
CC2013 Bristol County Case Fund Grants	111,707	-	-	-	-	-	-	111,707
CC2014 Congregational Program Grants	-	-	-	-	-	-	-	-
CC2015 Deaf Ministry Grants	8,358	-	-	-	-	-	-	8,358
CC2021 Sending Serving Grants	48,000	-	-	-	-	-	-	48,000
CC2022 House of Mercy Grants	27,607	-	-	-	-	-	-	27,607
CC2031 Hispanic Ministries	25,000	-	-	-	-	-	-	25,000
CC2112 Spring Learning Event	11,000	10,000	1,200	-	(3,700)	-	-	18,500
CC2113 Resource Day	11,500	1,500	-	-	(1,500)	-	-	11,500
CC2131 CRT Workshops	18,000	-	1,000	-	(2,000)	-	-	17,000
CC2132 Anti-Racism	1,000	-	1,000	-	(500)	-	-	1,500
CC2133 Safe Church	-	5,700	3,300	-	(3,000)	-	-	6,000
CC2151 Resource Center	-	-	600	-	-	-	-	600
CC2161 Consultants and Coaches	300	4,000	8,500	-	-	-	-	12,800
CC2171 Practice Areas	500	-	-	-	-	-	-	500
CC2200 CRT Support	32,000	-	1,000	-	-	-	-	33,000
CC2211 Congregation Support	2,000	-	3,000	12,000	-	-	-	17,000
CC2221 Program Support	12,000	2,300	700	-	(5,000)	-	-	10,000
CC2231 Committee Support	-	-	700	-	-	-	-	700
CC2311 Diocesan Communications	60,000	60,000	20,000	-	-	-	-	140,000
CC2312 FYI Newsletter	-	-	2,500	-	-	-	-	2,500
CC2313 Episcopal Times	-	-	300	-	-	-	-	300
Totals	638,972	438,574	43,800	12,000	(15,700)	-	-	1,117,646

Congregational Resources & Training
2013 Supplemental Budget

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs.</u>	<u>Mgt and Prof Svcs.</u>	<u>Total Expenses</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actuals									
CC2014 Congregational Program Grants	75,000	0	0	0	75,000	0	0	0	75,000
CC2052 Green Grants & Loans	133,287	0	2,523	0	135,810	-175	0	0	135,635
CC2222 Family Camp	16,673	0	439	0	17,112	-16,060	0	0	1,052
Totals	224,960	0	2,962	0	227,922	-16,235	0	0	211,687
	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs.</u>	<u>Mgt and Prof Svcs.</u>	<u>Total Expenses</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Stewardship Fund</u>	<u>Total</u>
2013 Budget									
CC2014 Congregational Program Grants	60,000	0	0	0	60,000	-6,181	-3,819	-50,000	0
CC2052 Green Grants & Loans	20,000	0	0	0	20,000	-20,000	0	0	0
CC2222 Family Camp	80,000	0	0	0	80,000	-26,181	-3,819	-50,000	0
Totals									60,000

Strategic Ministries (see tables on pages 32 and 33)

The total 2013 budget for this area is \$2,277,882, with \$1,093,382 in the core budget and \$1,184,500 in the supplemental budget. The 2012 core budget total was \$838,882.

Strategic Ministries: 3000

Compensation in this area is in the specific cost centers.

Youth Ministry: 3011 - Core & Supplemental

The core budget for the diocesan youth ministry includes the compensation and benefits for the director of youth ministry plus \$60,000 for program and support expenses, \$15,000 of which is to be raised by the Annual Fund specifically to support new initiatives around regional youth events. The total budget also anticipates another \$27,000 in expenses which are offset by \$27,000 in fees and other supplemental revenue.

Life Together: 3056 - Core & Supplemental

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

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

In the 2012-2013 program year, 28 young adults will be affiliated with Life Together, as a part of four different cohorts:

- Emmaus Fellows are second-year fellows based in the greater-Boston area. This cohort is focused on capacity building, working 15 hours per week with Life Together. In addition, they work at nonprofit organizations and churches, focused on social and structural change.

- Micah Fellows are also based in the greater-Boston area. They work at churches and nonprofit organizations. Micah Fellows work for social justice, grow as leaders and live in community with other fellows. They also participate in about eight hours a week of leadership training and spiritual reflection.

- Esperanza Academy Teaching Fellows—A partnership between Life Together and Esperanza Academy, located in Lawrence, focused on training teachers and leaders who want to work for change through the education system. The Esperanza Academy Teaching Fellows teach classes, work and coach in the extended-day program of the school as well as joining the Boston fellows for monthly leadership trainings, and they live together in intentional community.

- South Coast Mission Hub Fellows—Funded by the Together Now campaign, this is an affiliate program partner with Life Together. The South Coast Mission Hub is a pilot project of the diocese to bring together local churches and engage them in common missional work. The fellows will be living together in Fall River and each will work at a nonprofit organization or church in the greater Fall River and New Bedford communities.

Funding: In the past, the Life Together program (and the Relational Evangelism pilot project) has been funded largely through the supplemental budget. The core budget contributes

\$75,000, which is a bit less than the total compensation cost for the program's director. Supplemental resources, including external grants and contributions, and internal grants from Annual Fund proceeds and from the bishop's discretionary funds provided the bulk of additional funding.

In the 2012-2013 program year, however, Life Together plans to secure substantial funding outside of the diocese and projects a more diverse and balanced funding structure. Including in-kind estimates, the total budget in the coming year is \$660,000. The plan for securing the needed revenue is:

- Site fees of \$239,000 (\$10,000 per intern)
- External grants totaling \$145,000
- Annual fundraising event hosted by staff and fellows to net \$35,000
- Consulting fees totaling \$10,000
- Core budget contribution of \$75,000
- Support from the Annual Fund and Bishop's Discretionary Fund grants totaling \$85,000
- In-kind housing services worth \$75,000

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

Housing: In the 2012-2013 program year, one intentional community will continue to be housed in a diocesan property (40 Prescott Street in Brookline). Since this is a year-to-year arrangement and since the total number of interns can change, for the purpose of understanding the cost model of the Life Together program, this budget includes the in-kind value of housing provided this year by diocesan property.

Additionally, Life Together is partnering with All Saints Parish in Brookline in the fall of 2012. Eight Boston fellows will live in the rectory and Life Together will pay All Saints Parish rent for the program year.

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

MIT Campus Ministry: 3111 - Core

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$113,074) plus program expenses of \$6,500. The ministry may raise additional funds through the MIT development office.

Boston University Campus Ministry: 3121 - Core

The Boston University campus ministry cost center budget provides for salary, expenses and benefits for a half-time chaplain (\$47,199) plus program expenses of \$6,000.

Boston College-Northeastern University Campus Ministries:

3131, 3136, 3141 - Core & Supplemental

One chaplain splits her time between the Boston College and Northeastern campuses, and the shared cost center, 3136, provides for the salary, expenses and benefits (\$106,512). Each of these campus ministry programs is allotted \$6,500 for program support. The chaplain, with the diocesan bishop, has traditionally led a pilgrimage at Christmastime with college students, funded through the supplemental budget. There is no pilgrimage planned in 2013.

Tufts University Ministry: 3171 - Core

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

St. Paul's Church, Brockton: 3221 - Proceeds from Sales (see page 40)

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

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

Level funding is provided in the 2013 budget for grants directly to congregations to help pay their clergy, as follows: San Lucas/St. Luke's, Chelsea, \$66,000; and San Juan/Christ Church, Hyde Park, \$44,000; and for the compensation and benefits paid directly to the vicar at St. Stephen's Church, Boston (\$116,114).

Cantonese Congregations: 3311, 3321 - Core & Supplemental

The core budget provides the full compensation and benefits support for the canon for Asiamerican ministries in cost center 3311 (\$116,114). The two Cantonese congregations raise additional funds for their ministries through contributions and grants (projected at \$50,000 and \$48,000). These revenues and the activities funded through them are reflected in the supplemental budget lines for these two cost centers.

Dorchester Partnership: 3331 - Core

St. Mary's Church, Dorchester did not ask for support in the 2013 core budget. It is well on its way to self-sufficiency. (See page 40.)

Hispanic Ministry in Salem: 3341 - Core

New clergy leadership is now in place at San Pedro/St. Peter's. The level-funded \$80,000 grant in the 2013 core budget will help the congregation, both Hispanic and Anglo, to follow its strategic plan that would have it increasingly viable over the next five years.

Grace Church, Lawrence: 3351 - Core

The level-funded \$72,000 grant in the 2013 core budget supports part of the salary of a Hispanic priest who ministers to all members of the congregation. Grace is in the process of developing a strategic plan.

Church of the Good Shepherd, Watertown: 3361 - Supplemental

At Bishop Shaw's behest, the parishioners at Good Shepherd have developed a long-range plan to develop a center for family ministry. A grant of \$70,000 to support part of a clergy salary and a Life Together intern is included in the 2013 budget, funded in the supplemental budget through the proceeds from the sale of St. Andrew's in Belmont. Good Shepherd is in conversation with the use of proceeds committee on how best to continue to execute its plan.

Urban Residents: 3411 - Core & Supplemental

The Urban Residents program places newly ordained clergy in urban parishes for three-year terms, with experienced mentors who help to train the next generation of skilled urban clergy.

There are three urban residents in 2013: one full time for the whole year; one full time for half the year; one half time for the full year—the equivalent of two full-time grants. The core budget funds one full-time resident. The half salaries come from expected earnings of the 2013 Annual Fund and from the proceeds of the sale of St. Andrew's, Belmont.

African Ministries: 3431 - Core

The budget for grants to African congregations is level funded at \$25,000 in 2013. The director of congregational resources and training and the diocesan liaison to African Ministries are fine-tuning the application process with the African clergy and congregations.

Jubilee Ministry: 3511 - Core & Supplemental

The core budget shows a renewed commitment of 0.7% of the core budget to the Jubilee Ministry, set at \$45,000. The total budget projects additional new fundraising of \$50,000.

Gulf Coast Partnership: 3521

The diocese's post-Hurricane Katrina relief work and subsequent partnership commitments on the Gulf Coast were completed in December 2010.

Committee on Palestine and Israel: 3531

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

B-SAFE: 3541 - Supplemental

The B-SAFE program is an important outreach and partnership opportunity for more than 50 participating congregations, including five host churches and the Epiphany School. As a separate 501(c)(3), B-SAFE has its own set of financial controls and development efforts. For 2013 the program is budgeted a diocesan contribution of \$225,000 from the supplemental budget. A robust Annual Fund will reduce the pressure on the Bishop's Discretionary Fund.

Mission Through Partnerships: 3551 - Core

This line funds diocesan work with congregations on global mission partnerships.

The Cathedral: The Crossing; and Cathedral Ministry with the Homeless: 3911 - Supplemental
A \$50,000 grant is budgeted from the supplemental budget to support the work of the Thursday night emergent church congregation at the Cathedral Church of St. Paul and to support work with the homeless by the cathedral's associate minister. It is the responsibility of the Cathedral Chapter to decide how the grant is distributed.

Barbara C. Harris Camp and Conference Center: 3921 - Supplemental

For 2013, \$10,000 is budgeted, with additional support dependent on Annual Fund results.

Episcopal City Mission: 3931 - Core

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

United Thank Offering: 3952 - Core

This funding is dedicated for the support of the Native American Lilian Valley School in Blackfoot, Idaho.

**Strategic Ministries
2013 Core Budget**

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mot and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actuals								
CC3000 STRATEGIC MINISTRIES	-	-	356	-	-	-	-	356
CC3011 Youth Ministry	45,192	94,297	7,733	320	(32,816)	-	(105)	114,621
CC3012 Youth Leadership Academy	26,446	100	479	-	(1,020)	-	(24,641)	1,364
CC3066 Life Together	-	-	-	-	-	-	75,000	75,000
CC3111 MIT	4,537	107,334	5,600	-	-	-	-	117,471
CC3121 Boston University	8	18,888	1,641	-	-	-	-	20,537
CC3131 Boston College	-	1,902	-	-	-	-	-	1,902
CC3136 BC/NU Combined	6,887	113,789	15,550	1,558	-	-	(500)	137,264
CC3341 Northeastern	-	2,037	-	-	-	-	-	2,037
CC3371 Tufts University Ministry	4,000	-	-	-	-	-	-	4,000
CC3211 Natick, St Andrew's Deaf Ministry	-	-	11	-	-	-	-	11
CC3221 Brockton, St Paul's	-	-	47	-	-	-	-	47
CC3231 Chelsea, St Lukes/San Lucas	66,000	-	-	-	-	-	-	66,000
CC3241 Hyde Park, Christ Church/San Juan	33,000	-	-	-	-	-	-	33,000
CC3251 South End, St Stephen's	-	111,630	-	-	-	-	-	111,630
CC3311 Boston Cantonese Congregation	1,400	112,034	41	-	-	-	(22,000)	89,630
CC3331 Dorchester Partnership	44,873	114,648	-	-	-	-	(22,000)	91,474
CC3341 Salem, Iglesia de Gracia	80,000	-	-	-	-	-	-	80,000
CC3351 Lawrence, Grace Church	72,000	-	-	-	-	-	-	72,000
CC3411 Urban Residents	61,923	120	1,065	-	-	-	6,892	70,000
CC3431 African Ministries	20,000	1,550	83	-	-	-	-	21,633
CC3511 Jubilee Ministry	20,000	-	-	-	-	-	25,000	45,000
CC3551 Mission Through Partnerships	3,757	-	11,221	500	(9,864)	-	(230)	5,384
CC3931 Episcopal City Mission	60,000	-	-	-	-	-	-	60,000
CC3952 UTO/American Indians/CHS	1,500	-	-	-	-	-	-	1,500
Totals	551,523	678,329	43,827	2,358	(43,700)	-	37,416	1,269,752

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mot and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2012 Budget								
CC3000 STRATEGIC MINISTRIES	-	-	-	-	-	-	-	-
CC3011 Youth Ministry	45,000	69,130	8,000	-	(33,000)	-	-	89,130
CC3012 Youth Leadership Academy	26,000	-	500	-	(25,000)	-	-	1,500
CC3066 Life Together	-	-	-	-	-	-	52,500	52,500
CC3111 MIT	-	113,074	6,500	-	-	-	-	119,574
CC3121 Boston University	-	47,199	6,000	-	-	-	-	53,199
CC3131 Boston College	-	1,500	6,500	-	-	-	-	8,000
CC3136 BC/NU Combined	-	103,512	-	-	-	-	-	103,512
CC3341 Northeastern	-	1,500	6,500	-	-	-	-	8,000
CC3371 Tufts University Ministry	8,000	-	-	-	-	-	-	8,000
CC3211 Natick, St Andrew's Deaf Ministry	-	-	-	-	-	-	-	-
CC3221 Brockton, St Paul's	-	-	-	-	-	-	-	-
CC3231 Chelsea, St Lukes/San Lucas	66,000	-	-	-	-	-	-	66,000
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	-	-	-	44,000
CC3251 South End, St Stephen's	-	116,114	-	-	-	-	-	116,114
CC3311 Boston Cantonese Congregation	4,306	116,114	-	-	-	-	-	120,420
CC3331 Dorchester Partnership	-	116,114	-	-	-	-	-	116,114
CC3341 Salem, Iglesia de Gracia	80,000	-	-	-	-	-	-	80,000
CC3351 Lawrence, Grace Church	72,000	-	-	-	-	-	-	72,000
CC3411 Urban Residents	75,000	-	-	-	-	-	-	75,000
CC3431 African Ministries	-	-	-	-	-	-	-	-
CC3511 Jubilee Ministry	45,000	-	-	-	-	-	-	45,000
CC3551 Mission Through Partnerships	5,000	-	-	-	(5,000)	-	-	-
CC3911 Cathedral Church of St. Paul	-	-	-	-	-	-	-	-
CC3921 BCHCCC	-	-	-	-	-	-	-	-
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	-	30,000
CC3952 UTO/American Indians/CHS	1,434	-	-	-	-	-	-	1,434
Totals	501,740	568,142	34,000	-	(63,000)	-	52,500	1,093,382
								1,147,736

Strategic Ministries
2013 Supplemental Budget

	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mit and Prof Svcs	Total Expenses	Revenue Offset	BDF Grants	Annual Fund	Transfers	Total
2011 Actual										
CC3051 Micah Project	3,000	-	-	-	3,000	(4,500)	-	-	-	(1,500)
CC3056 Life Together	27,220	43,461	90,503	3,520	555,857	(1,46,500)	(214,286)	-	(138,025)	57,046
CC3136 BC/NU Combined	-	-	-	-	-	(650)	-	-	-	(650)
CC3251 South End, St Stephen's	-	-	-	-	-	-	(22,000)	-	22,000	-
CC3311 Boston Cantonese Congregation	-	-	-	-	-	-	(22,000)	-	22,000	-
CC3331 Dorchester Partnership	-	-	153,935	-	153,935	-	(12,719)	-	-	141,216
CC3361 Watertown, Good Shepherd	62,293	-	52	-	62,345	-	-	-	-	62,345
CC3411 Urban Residents	142,916	-	5,612	-	148,528	-	(52,500)	-	(26,892)	69,136
CC3511 Jubilee Ministry	81,518	990	221	67	82,796	-	-	-	(25,000)	57,796
CC3541 B-SAFE	225,000	-	-	-	225,000	-	(215,000)	-	(179)	9,821
CC3911 Cathedral Church of St Paul	-	-	-	-	-	-	(10,000)	-	-	(10,000)
CC3921 BCHCC	40,000	-	-	-	40,000	-	-	-	-	40,000
Totals	581,947	435,604	250,323	3,587	1,271,461	(151,650)	(548,505)	-	(1,46,096)	425,210

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	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mit and Prof Svcs	Total Expenses	Revenue Offset	BDF Grants	Annual Fund	Transfers	Total
2013 Budget										
CC3011 Youth Ministry	15,000	-	-	-	15,000	-	-	(15,000)	-	-
CC3051 Micah Project	64,500	43,600	91,000	-	591,500	(486,000)	-	(105,500)	-	225,771
CC3056 Life Together	-	-	-	-	-	-	-	-	-	22,500
CC3136 BC/NU Combined	-	-	-	-	-	-	-	-	-	8,000
CC 3171 Tufts Univ/Min	-	-	-	-	-	-	-	-	-	-
CC 3221 Brockton	-	-	-	-	-	-	-	-	-	-
CC 3231 Chelsea	-	-	-	-	-	-	-	-	-	-
CC3251 South End, St Stephen's	-	-	-	-	-	-	-	-	-	-
CC3311 Boston Cantonese Congregation	25,000	10,000	15,000	-	50,000	(50,000)	-	-	-	50,000
CC 3321 Cantonese Life Program	25,000	8,000	15,000	-	48,000	(48,000)	-	-	-	48,000
CC3331 Dorchester Partnership	-	-	-	-	-	-	-	-	(70,000)	60,000
CC3361 Watertown, Good Shepherd	70,000	-	-	-	70,000	-	-	(37,500)	-	175,000
CC3411 Urban Residents	75,000	-	-	-	75,000	-	-	-	-	80,000
CC3511 Jubilee Ministry	50,000	-	-	-	50,000	(50,000)	-	(100,000)	-	125,000
CC3541 B-SAFE	225,000	-	-	-	225,000	-	(125,000)	-	-	30,000
CC3911 Cathedral Church of St Paul	60,000	-	-	-	60,000	-	(60,000)	-	-	10,000
CC3921 BCHCC	-	-	-	-	-	-	-	-	-	-
Totals	609,500	454,000	121,000	-	1,184,500	(634,000)	(185,000)	(258,000)	(1,07,500)	834,271

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

The total 2013 budget for this area is \$2,420,212, with \$2,105,212 in the core budget and \$315,000 in the supplemental budget. The 2012 core budget total was \$2,116,970.

Area Staff and Expenses: 4000 - Core

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

Diocesan Leadership Team: 4011, 4012, 4014 - Core

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

Assisting Bishops: 4021 - Core

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

Chancellor: 4031 - Core

This line is budgeted at \$0, with every effort made to assign legal costs to the directly associated cost center(s).

Title IV: 4061 - Core

Canonical clergy disciplinary process, budgeted at \$10,000 for 2013.

Diocesan Leadership Team Budgeted Resources: 4099 - Core

The budgeted amount of \$131,619 for 2013 includes \$42,619 for contingencies and \$89,000 for increases in the total core staff compensation costs, including a 5.78% increase in health insurance premiums.

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

The 2013 amounts budgeted for these leadership bodies are \$10,500 for Diocesan Council; \$1,000 for Standing Committee; and \$4,000 for the Diocesan Youth Council.

Diocesan Convention: 4141 - Core

The \$26,200 net costs budgeted for 2013 may be reduced by holding a one-day convention.

Journals and Diocesan Directory: 4151 - Core

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

Archives: 4211 - Core

This line is funded primarily by spending policy draws from four restricted funds, which total \$12,910.

Massachusetts Council of Churches: 4251 - Core

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

Development Office: 4311- Supplemental

Since 2009, the Development Office staff has been funded in the supplemental budget, through a grant from the Bishop's Discretionary Fund. New positions are funded by the Together Now campaign. Staff salaries and expenses total \$250,000. The work of the Development Office, through the Annual Fund appeals, directed development efforts on behalf of specific ministries, external grant applications, planned giving and the Together Now campaign are essential to the viability of the supplemental budget program.

Annual Fund: 4312 - Supplemental

Projected all-in expenses for 2013 are \$42,000.

Capital Campaign: 4321

Capital campaign revenue and expenses are not shown in the core or supplemental budgets but are in a separate accounting fund. (See pages 42-44.)

General Convention: 4411 - Core

To prepare for the expenses of sending a delegation to the Episcopal Church's triennial General Convention in 2015, \$16,000 is held in reserve.

Province I Assessment: 4421 - Core

The total of \$19,179 (increased back to the 2011 level to take the executive director from one-third to half time) includes our diocese's contribution of \$16,179, and an additional \$3,000 to support the province's energy stewardship minister.

Episcopal Church Asking: 4431 - Core

Our diocese's contribution to the work of the wider church is \$949,646, about even with the 2012 asking.

**Episcopal and Diocesan Support
2013 Core Budget**

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mat and Prof Svcs</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actual								
CC4000 EPISCOPAL AND DIOCESAN SUPPORT								
CC4005 Canon of the Ordinary Expenses	-	154,482	31	-	-	-	-	154,513
CC4010 Diocesan Leadership Team	-	-	56	-	-	-	-	56
CC4011 Diocesan Bishop	4,875	209,156	79,139	5,600	(1,000)	-	(5,221)	292,549
CC4012 Suffragan Bishop 1	862	173,481	29,851	(196)	-	-	(1,567)	202,431
CC4013 Suffragan Bishop 2	-	157,851	47,912	95	-	-	(2,532)	203,327
CC4014 Canon to the Ordinary	-	149,994	9,856	525	-	-	-	160,375
CC4021 Assisting Bishops	-	-	38	-	-	-	-	38
CC4031 Chancellor	-	-	365	-	-	-	-	365
CC4061 Title IV	367	-	3,561	1,263	-	-	-	5,191
CC4099 DLT Budgeted Resources	1,000	5,640	534	7,514	-	-	-	14,688
CC4111 Diocesan Council	-	-	9,940	-	-	-	-	9,940
CC4121 Standing Committee	-	-	1,327	-	-	-	-	1,327
CC4131 Diocesan Youth Council	3,380	-	393	-	-	-	-	3,774
CC4141 Convention	3,514	1,132	31,976	367	(8,587)	-	-	28,402
CC4151 Journals and Diocesan Directory	-	-	11,578	-	(30)	-	-	11,548
CC4211 Archives	-	3,748	5,175	-	(640)	-	-	8,283
CC4251 Mass Council of Churches	50,000	-	-	-	-	-	-	50,000
CC4411 General Convention	16,179	-	8	-	-	-	-	16,187
CC4421 Province I Assessment and Program	980,724	-	1	-	-	-	-	980,725
CC4431 The Episcopal Church Assessment	-	-	12	-	-	-	-	12
Totals	1,060,901	855,640	232,890	15,168	(10,257)	-	(9,320)	2,145,024
2013 Budget								
CC4000 EPISCOPAL AND DIOCESAN SUPPORT								
CC4011 Diocesan Bishop	4,400	172,587	55,000	-	-	-	-	172,587
CC4012 Suffragan Bishop 1	600	208,792	47,000	-	-	-	-	268,192
CC4013 Suffragan Bishop 2	-	164,716	-	-	-	-	-	164,716
CC4014 Canon to the Ordinary	-	156,762	11,000	-	-	-	-	167,762
CC4021 Assisting Bishops	-	36,800	500	-	-	-	-	37,300
CC4031 Chancellor	-	-	-	-	-	-	-	-
CC4061 Title IV	-	-	-	10,000	-	-	-	10,000
CC4099 DLT Budgeted Resources	-	89,000	-	42,619	-	-	-	131,619
CC4111 Diocesan Council	-	-	10,500	-	-	-	-	10,500
CC4121 Standing Committee	-	-	1,000	-	-	-	-	1,000
CC4131 Diocesan Youth Council	4,000	-	-	-	(8,500)	-	-	4,000
CC4141 Convention	3,500	1,200	30,000	-	-	-	-	35,000
CC4151 Journals and Diocesan Directory	-	3,400	11,000	-	-	-	-	14,400
CC4211 Archives	-	-	9,510	-	-	-	-	9,510
CC4251 Mass Council of Churches	50,000	-	-	-	-	-	-	50,000
CC4411 General Convention	16,000	-	-	-	-	-	-	16,000
CC4421 Province I Assessment and Program	19,179	-	-	-	-	-	-	19,179
CC4431 The Episcopal Church Assessment	949,646	-	-	-	-	-	-	949,646
Totals	1,047,325	833,258	180,510	52,619	(8,500)	-	-	2,105,212

**Episcopal and Diocesan Support
2013 Supplemental Budget**

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mat and Prof Svcs</u>	<u>Total Expenses</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Transfers</u>	<u>Total</u>
2011 Actuals									
CC4011 Diocesan Bishop	5,000	-	-	-	5,000	-	-	-	5,000
CC4012 Suffragan Bishop 1	-	-	-	-	-	(600)	-	-	(600)
CC4013 Suffragan Bishop 2	-	-	-	5,172	5,172	-	-	-	5,172
CC4141 Convention	44,537	-	6,805	215	51,557	(17,105)	-	-	34,452
CC4300 Development Programs	-	144	-	-	144	-	-	-	144
CC4311 Development	-	230,463	41,753	1,437	273,653	-	(200,000)	-	73,653
CC4312 Annual Fund	-	-	1,189	10	1,199	-	-	-	1,199
Totals	49,537	230,607	49,747	6,834	336,725	(17,705)	(200,000)	-	119,020
	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mat and Prof Svcs</u>	<u>Total Expenses</u>	<u>Revenue Offset</u>	<u>BDF Grants</u>	<u>Annual Fund</u>	<u>Total</u>
2013 Budget									
CC4011 Diocesan Bishop	5,000	-	-	-	5,000	-	(5,000)	-	25,000
CC4012 Suffragan Bishop 1	-	-	-	-	-	-	-	-	-
CC4013 Suffragan Bishop 2	-	-	-	-	-	-	-	-	-
CC4099 DLT Budgeted resources	-	18,000	-	-	18,000	-	(18,000)	-	-
CC4141 Convention	-	-	-	-	-	-	-	-	-
CC4300 Development Programs	-	250,000	41,000	-	291,000	-	(250,000)	(41,000)	199,997
CC4311 Development	-	1,000	1,000	-	2,000	-	-	(1,000)	40,000
CC4312 Annual Fund	-	-	-	-	-	-	-	-	15,000
CC4321 Capital Campaign	-	-	-	-	-	-	-	-	18,000
CC4411 TEC General Convention	-	-	-	-	-	-	-	-	-
Totals	5,000	268,000	42,000	-	315,000	-	(273,000)	(42,000)	297,997

Administrative Services (see table on page 39)

The total 2013 budget for this area is \$1,182,957, all from the core budget. The 2012 core budget total was \$1,149,611.

Administrative Services: 5000 - Core

This area has six staff positions within it (see roster on page 53).

Treasurer's Office: 5011 - Core

This area includes support expenses of \$18,800 and outside service fees, including the auditors, totaling \$76,000. The cost center overall shows a net inflow, as the Treasurer's Office receives \$97,000 in fee income for financial and administrative services provided. The largest sources of fee income are the Cathedral Church of St. Paul (\$63,000) and the Trustees of Donations (\$34,000). The Stokes Fund loan offset has been moved to CC5511 for 2013.

Human Resources: 5021 - Core

The expense allocation of \$6,500 includes \$5,000 for services and \$1,500 for support.

Information Technology: 5031 - Core

The expenses of the IT operations are partially offset by fees received from the Cathedral Church of St. Paul (\$40,200).

Risk Management: 5041 - Core

This amount is raised to \$49,000, based on projections related to the cost of insurance.

Investments: 5051 - Core

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) associated with a particular bequest, including making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2013 is \$5,600.

Boston, 138 Tremont Street: 5111 - Core

Included in this budget cost center is \$441,600 for payment in lieu of rent to the Cathedral Church of St. Paul and approximately \$49,000 for repairs and maintenance for the diocesan offices.

Brookline, 40 Prescott Street: 5121 - Core

Cost of maintaining this property is budgeted at \$19,000.

SLAM Property, Allston: 5125 - Core

Cost of maintaining this property is budgeted at \$50,248. All tenants have vacated the buildings.

Services to Stokes Loan: 5511 - Core

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

**Administrative Services
2013 Core Budget**

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<u>2011 Actuals</u>						
CC5000 ADMINISTRATIVE SERVICES	0	535,874	3	411	-4,823	531,464
CC5011 Treasurer's Office	0	190	26,390	174,250	-79,125	121,705
CC5021 Human Resources	0	112	1,716	6,772	0	8,600
CC5031 Information Technology	0	0	100,657	0	-6,444	94,214
CC5041 Risk Management	0	0	53	50,472	0	50,525
CC5051 Investments	0	0	0	5,572	0	5,572
CC5100 Diocesan Facilities	0	0	250	0	-35,000	-34,750
CC5111 Boston, 138 Tremont Street	0	0	377,276	0	0	377,276
CC5121 Brookline, 40 Prescott Street	0	2,000	14,063	3,150	0	19,213
CC5125 SLAM	0	31,353	50,750	9,783	0	91,886
CC5511 Services to Stokes Loan	0	0	0	0	-20,000	-20,000
Totals	0	569,529	571,158	250,410	-145,392	1,245,705

	<u>Program Expenses</u>	<u>Compensation & Benefits</u>	<u>Operational & Support Svcs</u>	<u>Mgt and Prof Svcs</u>	<u>Revenue Offset</u>	<u>Total</u>
<u>2013 Budget</u>						
CC5000 ADMINISTRATIVE SERVICES	-	583,159	-	-	-	583,159
CC5011 Treasurer's Office	-	-	18,800	57,200	(97,000)	(21,000)
CC5021 Human Resources	-	-	1,500	5,000	-	6,500
CC5031 Information Technology	-	-	64,744	-	(40,200)	24,544
CC5041 Risk Management	-	12,000	-	49,000	(12,000)	49,000
CC5051 Investments	-	-	-	5,600	-	5,600
CC5100 Diocesan Facilities	-	-	250	-	-	250
CC5111 Boston, 138 Tremont Street	-	-	490,656	-	-	490,656
CC5121 Brookline, 40 Prescott Street	-	4,000	15,000	-	-	19,000
CC5125 SLAM	-	23,648	26,600	-	-	50,248
CC5511 Services to Stokes Loan	-	-	-	-	(25,000)	(25,000)
Totals	-	622,807	617,550	116,800	(174,200)	1,182,957
						1,149,611

Proceeds from Closed Congregations: Additional Information

The following congregations have closed in recent years:

- St. George's Church, Maynard - 2006
- Church of the Holy Trinity, Marlborough - 2008
- St. Luke's Church, Malden - 2008
- St. Andrew's Church, Belmont - 2008
- Church of St. Matthew and The Redeemer, South Boston - 2008
- St. Alban's Church, Lynn - 2009
- St. Augustine's Church, Lawrence - 2009
- St. David's Church, Halifax - 2009
- St. Paul's Church, Brockton - 2010
- St. Luke's and St. Margaret's Church, Allston - 2010
- St. Paul's Church, Millis - 2010
- St. Andrew's Church of the Deaf, Natick - 2011
- Trinity Church, Weymouth - 2012
- Christ Church, Somerville - 2012 pending

In the transition surrounding a church closing, diocesan staff provide support and services of all kinds to guide the closing. At the end of the closing process, the remaining assets are transferred to the diocese, for the Diocesan Council to allocate. The council has developed and revised guidelines for the allocation process (the stewardship process). In February 2011, consistent with the guidelines, the council created a new Fund for Congregational Vitality from 50% of the net proceeds for the above congregations (except Brockton and Allston). The remaining 50% has been available for distribution by the council, with the intention that the council will consider the advice offered by various stewardship committees.

The table on page 41 shows status of the proceeds for 10 of the closed congregations:

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

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

Net Proceeds—Direct costs subtracted from proceeds

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

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

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

- Malden: \$175,000 to help fund a clergy salary at St. John's Church, Saugus, where a majority of the Malden congregation now worships
- Belmont: \$229,793 to help fund a clergy salary, interns and program at the Church of the Good Shepherd, Watertown, an experiment in building family ministry, and to fund half an urban resident grant at St. James's Church, Cambridge
- South Boston: \$463,456 to St. Mary's Church, Dorchester, at the request of the closing church and the deanery, for building repair, half an urban resident grant and program

Available—The amount available for distribution by Council in the stewardship process

The net proceeds from St. Paul's Church, Brockton are currently outside the stewardship process. Trinity Church, Weymouth, the Church of St. Luke and St. Margaret, Allston and Christ Church, Somerville are in various stages of the closing process. A decision is yet to be made as to the disposition or sale of the properties.

Episcopal Diocese of Massachusetts
Use of Proceeds from Closed Parishes Summary
As of 8/31/12

Parish	Gross Proceeds	Less Direct costs	Net Proceeds	Net Margin on Proceeds	50% of Net Proceeds	Designated or expended to date	Available
Maynard	392,507	(156,858)	235,649	60%	117,825		117,825
Marlborough	317,427	(56,205)	261,222	82%	130,611		130,611
Malden	611,007	(88,698)	522,309	85%	261,154	(175,000)	86,154
Belmont	1,106,318	(39,797)	1,066,521	96%	533,261	(229,793)	303,468
South Boston	1,106,939	(51,276)	1,055,664	95%	527,832	(463,456)	64,376
Lynn	619,978	(153,451)	466,527	75%	233,263		233,263
Lawrence	202,609	(73,837)	128,772	64%	64,386		64,386
Halifax	249,880	(81,169)	168,711	68%	84,356		84,356
Natick	255,287	(12,063)	243,224	95%	121,612		121,612
Millis	448,030	(89,640)	358,390	80%	179,195		179,195
	5,309,982	(802,993)	4,506,989	85%	2,253,495	(868,249)	1,385,246

Together Now Campaign: Additional Information

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

At the convention kick-off, it was announced that through the generosity of many donors, nearly \$8 million in pledges had been offered, setting the campaign on a path to success, ideally leading to a conclusion of intensive fundraising efforts in late 2012.

To successfully raise \$20 million, the campaign plan calls for \$12 million to be raised from individual leadership donors and \$8 million to be offered from parish participation. The Diocesan Council has requested that all congregations of the diocese join in the campaign. To encourage the highest degree of participation, there are four options for parish participation:

- Collaborative Campaign: Supported by the diocese, the campaign offers congregations the opportunity to raise significant 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 and offers each parish the tools they need to successfully reach their target. Parishes pay nothing out of pocket for the professional costs associated with the campaign. Parishes assume a modest 3% charge for administration of pledge processing. The diocese will receive 30% of all funds raised and the parish will receive the remaining 70%. Dollars raised over goal are split 85% to the parish and 15% to the diocese.
- In-Pew Collection: A focused educational effort, supported by two mailings and culminating in an in-pew pledge drive for the exclusive financial benefit of the diocesan campaign. This is primarily a diocesan staff-driven effort with the support of the clergy and vestry at each parish. The parish has an opportunity, through this method, to offer pledges to the campaign without having an impact on their annual budget.
- Parish-run Campaign and Tithe: Some parishes run their campaigns separately from the diocesan effort, because of timing or other considerations, but still include as part of their case objectives significant proceeds to benefit the diocesan campaign.
- Parish Pledge: Some parishes may prefer to participate by giving as a congregation, often through a gift offered through their annual budget.

In the final months of campaigning, the figures that follow share only part of the story, since the real power of this campaign is the mission and ministry it will make possible across the diocese and around the world. In addition, they reflect the strength of the culture of generosity here in the Diocese of Massachusetts. None of this would be possible without the offerings of thousands of donors.

Highlights as of Sept. 7, 2012

	<u># of Pledges</u>		<u>Pledge Totals</u>
Leadership giving	167		\$ 10,022,280
Collaborative Campaigns			
28 parish collaborative campaigns	1,135	\$ 12,848,654	
Less: parishes share of pledge (70%)		<u>\$ (8,994,000)</u>	
Diocesan share of collaborative campaign			3,854,654
34 campaigns through in-pew collections	814		835,787
Tithes offered from two parish-run campaigns			312,500
Other parish pledges	<u>19</u>		<u>329,350</u>
 Total Diocesan share of pledges			 15,354,571
 Plus: parish share of collaborative campaign			 <u>8,994,000</u>
 Total pledges - Diocesan and parish share	2,135		 <u><u>\$ 24,348,571</u></u>

The July 31, 2012, cash flow chart on page 44 reflects the initial collection of pledges and contributions from individuals and parishes, designated gifts as well as general, unrestricted gifts. An amount of \$746,471 has been returned to parishes that participated in the collaborative campaign option. The expenses include the start-up costs for the first mission hub in Fall River; renovations on the cathedral kitchen; and campaign-related expenses, including, as is standard practice in fundraising efforts, consultation fees and expenses.

In August 2012, which is not reflected in the chart, the initial green grants disbursements (18 Green Improvement grants totaling \$174,392, and five Simple Acts grants totaling \$3,980, for a combined total of \$178,372) were made. The cash balance at the end of August is in the neighborhood of \$1 million.

Episcopal Diocese of Massachusetts
Comprehensive Campaign
Cash Flow Analysis
Inception to Date through July 31, 2012

	<u>General</u>	<u>Mission Tithe</u>	<u>Mission Hubs</u>	<u>Youth and Young Adults</u>	<u>Cathedral Church Renovations</u>	<u>Cederholm House</u>	<u>Total</u>
Net Contributions							
Contributions/Pledges Received							
Leadership Gifts	1,967,125		102,095	67,004	16,390	29,554	2,182,168
Collaborative gifts from parishes (100% gross)	1,348,626		(50)	-	-	-	1,348,576
In pew collections	73,836		-	-	-	-	73,836
Total Contributions	3,389,587	-	102,045	67,004	16,390	29,554	3,604,580
Payments to collaborating parishes							
Less payments to collaborating parishes to date (70%)	746,471		-	-	-	-	746,471
Less estimate for payments to be paid in short term	170,000		-	-	-	-	170,000
Payments to collaborating parishes	916,471	-	-	-	-	-	916,471
Net Contributions	2,473,116	-	102,045	67,004	16,390	29,554	2,688,109
Direct Campaign Expense	-	230,000	-	250,000	100,000	-	580,000
Other Expenses							
Hospitality	31,266		1,377	-	-	-	32,643
Travel	51,096		3,615	-	-	-	54,711
Program supplies and resources	1,304		-	-	-	-	1,304
Compensation and benefits	187,541		-	-	-	-	187,541
Equipment	853		-	-	-	-	853
Office	3,055		-	-	-	-	3,055
Telephone	9,780		-	-	-	-	9,780
Postage and mailing	13,080		971	-	-	-	14,051
Advertising	1,800		-	-	-	-	1,800
Printing	42,902		-	-	-	-	42,902
Lodging and meals	1,977		-	-	-	-	1,977
Registration fees	1,157		-	-	-	-	1,157
Other operating support	23,135		-	-	-	-	23,135
Consulting	1,253,575		-	-	-	-	1,253,575
Legal	4,723		-	-	-	-	4,723
Outsourced operations	21,911		-	-	-	-	21,911
Total Other Expenses	1,649,155	-	5,963	-	-	-	1,655,118
Total Campaign Expenses	1,649,155	230,000	5,963	250,000	100,000	-	2,235,118
Net contribution inception to date (cash basis)	823,961	(230,000)	96,082	(182,996)	(83,610)	29,554	452,991

Appendix 1: 2013 Endowment Spending Policy Revenue

		Draw
D7002C	JOHN B COBURN ENDOWMENT FUND	45,043
D7002D	C.L.T. LEE / B. WONG FUND	4,306
D7002E	AFRICAN SCHOLARSHIP FUND	9,365
D7002G	ENDOWMENT FOR MAINTENANCE	6,977
D7002J	AIM / HOSPITAL MINISTRY	20,637
D7002L	HARRIET G AVERILL FUND	1,434
D7002M	D A F BISHOP NASH FUND	7,431
D7002N	CLERGY SALARY FUND	27,288
D7002O	CAMP DENNEN FUND	1,519
D7002P	FREDRICK C LAWRENCE/RHINELANDER FUND	9,107
D7002T	THE ELIZA GRAY CASE TRS P E C	111,707
D7002U	CAMPUS MINISTRIES FUND	8,585
D7002V	ST JOHNS EAST BOSTON FUND	23,381
D7002Y	HOUSE OF MERCY FUND	26,016
D7003A	THE JESSIE B COX FUND	28,279
D7003B	WILLIAM V. TRIPP JR. MEMORIAL FUND	36,219
D7003C	AIM CHRISTIAN WITNESS IN EDUC	34,200
D7003D	MAURINE C COBURN TRUST	6,114
D7003E	YOUTH ON MISSION	6,482
D7003F	AIM WILLIAM COOLIDGE ENDOWMENT FD	134,942
D7003K	POOLED INCOME ENDOWMENT FUND	262
D7003R	W. CHISOLM FUND	3,344
D7004E	SEMINARIAN EDUCATIONAL ENDOWMENT	45,460
D7004H	DEAF MINISTRY ENDOWMENT	8,358
D8000T	FREDERICK A REEVE FUND	7,953
D8000V	THOMAS M COFFIN FUND	4,601
D8000W	A. JACKSON FUND	2,772
D8000X	BISHOPS ENTERTAINMENT	5,695
D7004I	TOTAL FUND FOR CONG VITALITY	108,792
D7002X	GENERAL ENDOWMENT FUND	90,195
		<hr/>
	Total 2013 Draw - Endowment Funds	826,464

Appendix 2: 2013 Trust Fund Income

	Draw
D2110B G & S TURNER MEMORIAL FUND	479
D4065A ST MATTHEWS ENDOWMENT FD	5,306
D4065B SAMUEL & EMMA DOWNING FD	280
D4065C JOSEPH C STOREY FUND	3,080
D4065D MARY A WILSON FUND	1,622
D4065E A SMITH FUND FOR RECTORY MAINTENANCE	2,347
D4065G MARTHA TERRY FUND	10
D7000A DIOCESAN ENDOWMENT FUND	169,442
D7000B VOTE OF CORP DIOCESAN FUND - VOC	65,915
D7000D FAY DONATION I	8,618
D7000G BENJAMIN LEEDS FUND - VOC	156,489
D7000I CHURCHES AND CHAPELS FUND - VOC	3,195
D7001E APPLETON FUND	1,789
D7001F BISHOP'S FUND	41,962
D7001G BISHOP OF MA SALARY FUND	5,283
D7001H BISHOPS HOUSE FUND	8,673
D7001I SUFFRAGAN BISHOPS FUND	33,960
D7001J CAMILLA DAVENPORT FUND	1,330
D7001K CORNELIA A FRENCH FUND	29,737
D7001L KATHERINE FRENCH FUND	6,181
D7001O ETHEL A CLARK FUND	40,735
D7001Q MARY K D BABCOCK FD I	9,462
D7001R MARY K D BABCOCK FD II	1,181
D7001S JULIA K DAVEY FUND	2,941
D7001T WILLIAM C WINSLOW FUND - VOC	431
D7001W WK OF MERCY HARVISON FUND	1,591
D7001X AMY YEAMES FUND	1,909
D7001Y EDITH MUNRO FUND	834
D7002Q AC BULLARD FD STUDENTS	8,023
D7003X PATTON MEMORIAL FUND	43,343
D7004B PATTON FUND FOR MAINTENANCE	3,569
D7004C KATHERINE M. FOSTER TRUST	7,537
D7004D FRANK H. BURNETT FUND	1,560
D8000R Dill	2,400
D9000Z ABBY BROWN TRUST - VOC	6,265
D9001B EDMUND F SLAFTER FUND II	7,847
	<hr/>
Total 2013 Draw - Trust Funds	685,326

Appendix 3: Grants to Congregations in 2011

Congregational Development Grants

Congregational Development Grants Phase I			
Church	City/Town	Title	Grant
All Saints' Church	Attleboro	Inviting People into the Life of All Saints Through Service	\$2,700
St. Andrew's Church	Ayer	Inviting Our Neighbors to Church	\$4,000
St. Stephen's Church	Boston	Building on the Foundation for Formation and Community Life	\$3,750
Chinese Ministry	Boston	Youth Zone	\$3,000
Eccelesia	Boston	Supporting Our Ministry	\$2,000
The Crossing	Boston	Enhancing Our Worship	\$2,000
Emmanuel Church	Braintree	Forming Through Christian Education	\$612
Grace Chapel of St John's Church	Brockton/Holbrook	Celebrating the Chapel's First Year	\$3,000
St. Peter's Church	Buzzards Bay	Inviting Our Neighbors to Join Us	\$4,650
St. James's Church	Cambridge	St. James's Anti-Racism Initiative	\$5,000
St. Christopher's Church	Chatham	Empowering Christians in a Digital World	\$4,026
St. Christopher's Church	Chatham	A Social Media Tools Workshop: The Acorn Project	\$5,000
Calvary Episcopal Church	Danvers	Raise High the Roof Beams	\$2,000
Grace Church	Everett	English, Literacy, Spiritual Support for Immigrants	\$7,000
Church of the Holy Spirit	Fall River	Church Without-Walls Ministry	\$3,000
St. Andrew's Church	Framingham	Enhancing Our Portuguese Ministry	\$8,000
St. John's Church	Franklin	Collaborative Ministry of Wrentham and Franklin	\$10,000
St. John's Church	Gloucester	Cape Ann Choir School	\$4,000
St. James's Church	Groveland	Generations in Faith 2011-2012	\$5,000
St. Andrew's Church	Hanover	A Visibility and Welcoming Initiative	\$2,700
Trinity Church	Haverhill	New Faces For Trinity	\$3,800
Grace Chapel of St John's Church	Holbrook/Brockton	Ministry at Brockton	\$10,000
St. Luke's Church	Hudson	St. Luke's Youth Program	\$2,000
Hispanic Ministry (St. Anne's Church)	Lowell	Hispanic Ministry Working Together	\$5,000
St. Stephen's Church	Lynn	Christ-Like Hospitality Year III	\$8,400
Trinity Church	Marshfield	See How they Love Each Other Evangelism Project	\$3,000
Church of the Holy Spirit	Mattapan	Administration at Holy Spirit	\$4,000
Christ Church	Medway	Family Focused Ministry	\$3,800
St. Andrew's Church	Methuen	Expanding Youth Ministry Program	\$3,600
S. Andrew's Church	New Bedford	Growing Our Sunday Morning Worship	\$3,000
St. Paul's Church	Newton Highlands	Intergenerational Interfaith Invitation	\$7,700
Grace Church	Norwood	Traveling Stations of the Cross and a Course of Study	\$2,200
St. Paul's Church	Peabody	Administration at St. Paul's Church	\$2,000
Christ Church	Plymouth	Sustainable Ministry at Christ Church	\$6,500
St. Mary of the Harbor	Provincetown	WAVE (Wonders and Values Exploration)	\$2,800
Christ Church	Quincy	School vacation program at Christ Church, Quincy	\$1,000
Trinity Church	Randolph	Trinity Randolph Lives Into Its Role in the 21st Century	\$8,200
St. John St. James Church	Roxbury	Teen/Choir Program	\$5,000
Iglesia San Pedro- St. Peter's Church	Salem	Hispanic Ministries Translation Program	\$2,000
Christ Church	So Hamilton	Door-to-Door Inviting, Alpha and Ockham's Kegger Series	\$2,000
Church of Our Saviour	Somerset	Parish Retreat Program	\$2,000
All Saints' Church	Stoneham	Starting a Christian Education Program	\$2,850
St. Thomas's Church	Taunton	Inviting the Marginalized to Our Church	\$2,000
Epiphany Church	Walpole	Strengthening Parish Communication	\$3,479
Epiphany Church	Walpole	Rhythms of Grace Hosted by Epiphany Church	\$11,783
Church of the Holy Spirit	Wayland	Spiritual Connections Through Outdoor Worship	\$3,000
St. Chrysostom's Church	Wollaston	Evangelism in the 21st Century	\$1,200
Church of the Messiah	Woods Hole	Securing Financial Health Now and in the Future	\$6,250
CDG Phase I Total			\$200,000

Appendix 3: Grants to Congregations in 2011 (continued)

Congregational Development Grants (continued), Sending Serving Grants

Congregational Development Grants Phase II

Church Name	Town	Title	Grant
Emmanuel Church	Braintree	Stewardship	\$4,000
Small Church Summit	Diocesan-Wide	Collaborative Projects	\$10,000
Partners For Sacred Spaces	Diocesan-Wide	Collaborative Projects	\$10,480
St Mary's Church	Dorchester	A Ministry of Administration	\$5,000
St. John's Church	Holbrook	Music Ministry and Leadership Development	\$4,000
St. Paul's Church	Malden	A Pilot Program for Administration	\$4,000
Two Church Collaborative	Peabody/Danvers	Collaboration	\$3,000
St. Chrysostom's Church	Quincy	Social Media Program	\$6,920
St. Peter's Church	Salem	Support for New Ministry	\$1,600
St James' s Church	Somerville	Stewardship	\$4,000
All Saints' Church	West Newbury	Stewardship	\$4,000
St. Mark's Church	Westford	Support for New Ministry	\$10,000
Trinity Church	Woburn	Social Media Program	\$3,000
Phase II Total			\$70,000

Sending Serving Grants Budget

\$48,000

Alewife Deanery

Church of Our Saviour	Arlington	Lunch Program/Nourishing Our Neighbors	\$1,000
St. Paul's Church	Bedford	Community Table	\$150
St. Mark's Church	Burlington	Leadership Development Training	\$350
All Saints' Church	Belmont	Prayer Books for Troops	\$200
St. James' Church	Cambridge	Food Food/Good Friends Meal Program	\$600
Our Redeemer	Lexington	El Hogar Computer Lab Upgrade	\$300
Christ Church	Waltham	Diaper Depot	\$1,500
Christ Church	Cambridge	Outdoor Church (pastoral support)	\$300

Boston Harbor Deanery

St. Stephen's Church	Boston	B-SAFE	\$2,000
St. Mary's Church	Dorchester	Fresh Food Initiative	\$2,000

Charles River Deanery

All Saint's Church	Brookline	Charles River Deanery Youth Collaborative	\$1,500
St. Paul's Church	Brookline	Brookline Episcopal Teen Alliance	\$500

Merrimack Valley Deanery

St. Paul's Church	No. Andover	Hancock Courts Housing Project	\$2,000
St. John's Church	Lowell	Kaleidoscope School Arts Program	\$2,000

Mystic Valley Deanery

St. Luke's-San Lucas Church	Chelsea	St. Luke's-San Lucas Community Kitchen	\$4,000
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Appendix 3: Grants to Congregations in 2011 (continued)

Sending Serving Grants (continued), House of Mercy Grants

North Shore Deanery

Grace Church	Salem	Choir School	\$571
St. Peter's Church	Beverly	Outreach Meals	\$571
St. Peter's Church	Salem	Diaper Ministry	\$571
St. Paul's Church	Peabody	Brazilian Ministry	\$571
St. Stephen's Church	Lynn	Youth Trip	\$571
Christ Church	So. Hamilton	ACORD Food Pantry	\$571

South Shore Deanery

St. Stephen's Church	Cohasset	Long Island House Soup Kitchen	<u>\$1,607</u>
			\$23,433

House of Mercy Grants Budget

\$24,117

Alewife Deanery

St. James's	Cambridge	Diapering Program	\$350
St. Peter's Church	Cambridge	Afterworks Child Care Program	\$150
Christ Church	Waltham	Diaper Depot	\$1,500

Boston Harbor Deanery

St. Stephen's Church	Boston	B-SAFE Program	\$1,000
St. Mary's Church	Dorchester	Steel Pan Band	\$1,000

Charles River Deanery

All Saints' Church	Brookline	Crossroad Family Shelter	\$800
Church of Our Redeemer	Chestnut Hill	Trinity Education for Excellence Program	\$400
Christ Church	Needham	Circle of Hope Inc. Greater Community Exchange	\$800

Concord River Deanery

St. Michael's Church	Holliston	Le Chef Program (for residents of Serenity House and Shadows Shelter)	\$1,000
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Merrimack Valley Deanery

St. James's Church	Groveland	Women and Children in Need	\$2,500
Trinity Church	Haverhill	Academy of Creative Arts	\$2,500

North Shore Deanery

Calvary Church	Danvers	Children's Party	\$625
St. Stephen's Church	Lynn	Community Family Outreach	\$625
Grace Church	Salem	Choir School	\$625
Christ Church	So. Hamilton	Refugee Immigration Ministry	\$625

South Shore Deanery

St. Andrew's Church	Hanover	So. Shore Deanery Programs for Women and Children	\$2,000
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Taunton River Deanery

Bristol Cluster Ministry	Taunton	Help Us Get Safe/Cranwood Children Services/ Outreach for families with terminally ill children	<u>\$2,000</u>
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\$18,500

Appendix 3: Grants to Congregations in 2011 (continued)

Bristol Case Grants, Continuing Ed Grants, Sabbatical Funds, Bishops' Funds, Clergy Children College Scholarships

Bristol County Case Trust Budget **\$104,052**

Church of the Holy Spirit	Fall River	Homeless Ministry/ Christian Ed./Outreach	\$11,100
St. Luke's Church	Fall River	Youth Outreach Program	\$9,000
Grace Church	New Bedford	Y2A/Food Pantry/After School Program/Community Breakfast	\$20,875
St. Andrew's Church	New Bedford	Summer Literacy Program	\$14,500
St. Martin's Church	New Bedford	Youth Outreach/Music Program/Thrift Shop/Handicap Bathroom	\$6,200
St. Mark's Church	North Easton	Outreach Ministry/Pastoral Ministry	\$1,975
Church of Our Saviour	Somerset	Annual parish retreat	\$2,100
Christ Church	Swansea	Ministry with/for Families, Children and Youth	\$9,375
St. John's Church	Taunton	Outreach Taunton State Hospital/Children and Youth Ministries	\$5,900
St. Thomas' Church	Taunton	Sat. Service/ Mission Trip/Ecumenical & Youth Programs	<u>\$15,725</u>

\$96,750

Continuing Education Grants - 2011

Unaffiliated	Newton	Interim Ministry Training	\$500
Christ Church	Andover	CREDO	\$275
St. Paul's Cathedral	Boston	Spiritual Direction Training	\$500
Grace Chapel	Brockton	Courses at Andover Newton Theol. Seminary	\$415
MIT	Cambridge	Clergy Leadership Program	\$500
St. Luke's Church	Fall River	Study of Khmer Language	\$500
St. John's Church	Holbrook	Teaching English as 2nd Language	\$500
Our Redeemer	Lexington	Spanish Language Training	\$500
Good Shepherd	Watertown	Conference with Epis. Church Officer For Redevelopment	\$487
Unaffiliated	Boston	Course at General Theological Seminary	\$500
Trinity Church	Marshfield	Coaching Appreciative Leaders	<u>\$500</u>

\$5,177

Sabbatical Funds Granted in 2011

Episcopal Diocese of MA	Boston	\$4,400
St Mark's Church	Burlington	\$4,400
St Stephen's Church	Lynn	\$1,900
Church of the Holy Nativity	So. Weymouth	\$4,400
St. Elizabeth's Church	Sudbury	\$1,900
Christ Church	Swansea	\$4,400
Bristol Cluster	Taunton	\$4,400
Epiphany Church	Walpole	<u>\$4,400</u>

\$30,200

Sabbatical Funds Granted in 2012

Episcopal Diocese of MA	Boston	\$4,400
Emmanuel Church	Boston	\$4,400
St. John the Evangelist	Duxbury	\$4,400
Provincetown	St. Mary's	<u>\$4,400</u>

\$17,600

Bishops' Funds

Aid to Congregations	12 grants	\$20,875
Aid to Clergy	20 grants	\$44,052
Children's Programs not including B-SAFE	3 grants	\$24,305
Mission and Outreach	7 grants	<u>\$7,530</u>

\$96,762

Clergy Children College Scholarships 12 students **\$43,000**

Appendix 3: Grants to Congregations in 2011 (continued)

Society for the Relief of Aged or Disabled Clergy, Society for the Relief of Widows, Widowers and Orphans of Clergy, Stokes Fund Loans, Creation Care Initiative Grants

Society for the Relief of Aged or Disabled Clergy	Served 46 clergy	\$120,134
Society for the Relief of Widows, Widowers and Orphans of Clergy	Served 36 widows	<u>\$70,274</u>
		\$190,408
Stokes Fund Loans	8/31/2012 Balance	\$2,653,710
94 Loans		
21 Churches	1-5mos. in arrears	
70 Churches	Current	
3 Churches	Ahead	
Creation Care Initiative	(Simple Acts & Green Improvement Grants)	\$150,000
Alewife Deanery		
St. Paul's Church	Bedford	Energy Saving Windows for Nursery School \$10,000
Church of Our Redeemer	Lexington	For rectory: Ductless heating/cooling system/bathroom exhaust fan/fireplace doors \$10,000
Boston Harbor Deanery		
Church of the Advent	Boston	Tuesday Night Supper Recycling Program \$500
St. Stephen's Church	Boston	Upgrade windows/thermostats, water heater and boiler \$9,500
Cape & Islands Deanery		
Christ Church Parish	Plymouth	Meditation Garden \$500
Charles River Deanery		
Church of Our Saviour	Brookline	Weather stripping/interior storm windows/hot water heater/efficient lighting/energy star refrigerator \$10,000
Grace Church	Newton	Boiler Replacement/Upgrade Heating System \$10,000
Concord River Deanery		
St. Andrew's Church	Ayer	Go Greener Energy Conservation Contest \$400
		Peabody Room Energy Efficient Rehab \$7,560
St. Andrew's Church	Framingham	Bird Habitat Education Program \$500
Merrimack Valley Deanery		
St. James's Church	Amesbury	Stone and Light-upgrade thermal envelope \$10,000
St. Andrew's Church	Metheun	Operation Green Neighbor \$500
St. Paul's Church	No. Andover	Replace windows/Add interior storm windows \$7,400
Mt. Hope-Buzzards Bay Deanery		
Church of the Holy Spirit	Fall River	Furnace and boiler upgrades \$8,000
St. Luke's Church	Fall River	New windows/Automatic lighting switches \$2,750
		Light Bulb Subsidy Program/Environment Education \$400
Christ Church	Swansea	Healing Garden \$500
Mystic Valley Deanery		
Grace Church	Everett	Green Grace Sunday School Curriculum \$500
Grace Church	Medford	Lighting upgrade \$10,000
Emmanuel Church	Wakefield	Replace pipes/Install temperature control zones/radiator \$10,000
Neponset River Deanery		
Grace Church	Norwood	Community Meditation Orchard \$500
Epiphany Church	Walpole	Upgrade windows; replace boiler \$10,000

Appendix 3: Grants to Congregations in 2011 (continued)

Creation Care Initiative Grants (continued)

North Shore Deanery

St. Stephen's Church	Lynn	Electrical work for a Greener Church	\$10,000
St. Peter's/San Pedro	Salem	Teaching the Three R's (Recycling Education)	\$420
Christ Church	So. Hamilton	Classroom window and frame replacement	\$10,000
Trinity Church	Topsfield	Upgrade boiler and control system	\$10,000

South Shore Deanery

Christ Church	Quincy	Helping Hands Essentials Pantry "Go Green Initiative	\$500
St. Stephen's Church	Cohasset	Upgrade heating system/Install energy efficient windows	\$10,000

Taunton River Deanery

Grace Chapel	Brockton	"Beautiful Gifts" Flowers and Native Plant Garden	<u>\$500</u>
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\$160,930

DIOCESAN STAFF POSITIONS BY AREA

Position	Incumbent
DEANERIES, CONGREGATIONS & CLERGY	
Canon for Congregations	The Rev. Canon Elizabeth Berman
Administrative Assistant to Bishop Shaw	Ms. Jackie Drapeau
Canon for Ordained Vocations	Canon Judith Lidberg
Administrative Assistant, Congregations and Clergy	Ms. Clare Moffitt
Administrative Assistant to Bishop Harris & Bishop Cederholm	Ms. Diane Pound
Director of Transition Ministries	Vacancy
CONGREGATIONAL RESOURCES & TRAINING	
Missioner for Christian Education, Formation and Discipleship	Ms. Amy Cook
Director of Congregational Resources and Training	The Rev. Karen Montagno
Coordinator for Congregational Support	Mr. Stephen Pierce
Director of Communications	Ms. Tracy Sukraw
Communications Assistant	New Position
Grants Administrator and Support to the Congregational Development Team	New Position
STRATEGIC MINISTRIES	
Director, Life Together	The Rev. Arrington Chambliss
Vicar, St. Stephen's Church, Boston	The Rev. Timothy Crellin
Chaplain, MIT	The Rev. Janie Donohue
Director, Youth Ministry	Mr. Samuel Gould
Managing Director, Life Together	Mr. Jason Long
Canon for Asiamerican Ministries	The Rev. Canon Thomas Pang
Chaplain, Boston University	The Rev. Cameron Partridge
Chaplain, Boston College and Northeastern University	The Rev. Judith Stuart
EPISCOPAL AND DIOCESAN SUPPORT	
Assisting Bishop (effective February 2012)	The Rt. Rev. Bud Cederholm
Associate Director of Development	Ms. Alison Hay
Development Assistant	Ms. Mary Ann Lee
Director of Development	Mr. Lynd Matt
Administrative Assistant to the Canon to the Ordinary	Ms. Suzette Phillips
Project Manager for Campaign Initiatives	The Rev. Samuel Rodman
Administrator of Convention and Council	Vacancy
Archivist	Vacancy
Director of Global Mission	New Position
ADMINISTRATIVE SERVICES	
Senior Accountant	Ms. Dana Courtney
Manager, Information Technology	Mr. Jamie Reamer
Chief Business Officer and Assistant Treasurer	Mr. Richard Strout
Accountant	Ms. Patricia Superville
Manager, Human Resources	Vacancy
Controller	Vacancy
DIOCESAN LEADERSHIP TEAM	
Bishop Diocesan	The Rt. Rev. M. Thomas Shaw, SSJE
Bishop Suffragan	The Rt. Rev. Gayle Elizabeth Harris
Canon to the Ordinary	The Rev. Canon Mally Ewing Lloyd

Budget Committee

Lisa Garcia (2012), Chair

Jane Bearden (2012)

Stephen Voysey (2013)

Matthew Cadwell (2014)

Ellen Sheehy (2014)

Lynn Smith (2014)

Ted Ts'o, Treasurer

Rick Strout, Assistant Treasurer and Chief Business Officer

Mally Lloyd, Canon to the Ordinary

Suzette Phillips, Clerk

