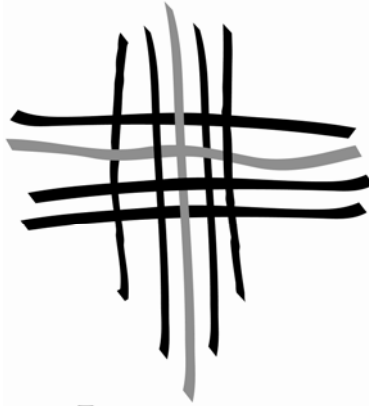


In Christ there is no East or West



223rd Diocesan Convention / Proposed Diocesan Budget 2009

Episcopal Diocese of Massachusetts



INVITING
FORMING
SENDING
SERVING

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

My Sisters and Brothers,

I want to commend to you for your careful consideration the 2009 diocesan budget and the accompanying narrative. It is the result of our listening to you and our prayer over the last months to discern how God might be calling us to do God's mission in eastern Massachusetts.

As your three bishops visited your congregations this past spring, we asked what is of concern to you. You told us that the dramatic rise in fuel and gasoline prices and the worsening economy would have major implications for your congregations over the next year. Early in the summer I shared with the budget committee our concerns about what we were hearing, and I pushed them to consider a budget that could provide some resources to alleviate the economic challenges that we face. This is the genesis of the budget presented here.

In addition, in our conversations with you we realized parishes and clergy were looking for a different kind of coverage and oversight from the bishops. The time we spent together this summer at Lambeth gave us an opportunity to develop new insights about how we can better serve parishes through strengthening our formation as a team and by changing our approach to visitations, congregation and ministry oversight, and episcopal and diocesan responsibilities.

And as another part of our commitment to serving congregations, our interim chief of staff has spent much of the past year examining how we conduct our business and how we deploy our staff resources. The resulting reorganization of diocesan operations and staff is reflected in this year's budget, and as a result, this package looks different from those in recent years. What has not changed is the mission strategy that is central to our life as a diocese and which continues to call us forward to join in God's transforming mission.

As always, your bishops are deeply grateful for the many ways you support and sustain us. Please pray for us as we pray for you.

Faithfully yours,

M. Thomas Shaw, SSJE

DIOCESAN CORE OPERATING BUDGET SUMMARY

This is the proposed 2009 Diocesan Core Operating Budget which is to be placed before the Diocesan Convention on November 8, 2008, for consideration and vote.

| | |
|---|---------------------|
| TOTAL OPERATING INCOME | \$ 6,947,871 |
| Assessments and Voluntary Contributions | 5,185,000 |
| Interest Income | 50,000 |
| Agency Income | 807,511 |
| Trust Income | 905,360 |
| | |
| TOTAL OPERATING EXPENSE | \$ 6,819,779 |
| Deaneries, Congregations, and Clergy | 985,396 |
| Congregational Resources and Training | 966,379 |
| Strategic Ministries | 1,392,900 |
| Episcopal and Diocesan Support | 1,727,552 |
| Administrative Services | 1,076,371 |
| Diocesan Office Leadership | 671,181 |
| | |
| OPERATING RESERVE | 128,092 |

THE 2009 DIOCESAN OPERATIONS AND BUDGET



Introduction

This year has been an active time in the life of the Diocese, and in particular for the operations of the diocesan offices. It has been a time for reviewing our organizational structure, and the 2009 budget reflects the results of this review.

The new organization for the diocesan operations has five functional areas:

- Deaneries, Congregations, and Clergy
- Congregational Resources and Training
- Strategic Ministries
- Episcopal and Diocesan Support
- Administrative Services

and these five areas shape the accompanying budget. The leadership team for the diocesan operations consists of the Diocesan Bishop, the two Bishops Suffragan, and the Canon to the Ordinary, a position restored by this reorganization. The Canon is the chief staff officer for the diocesan operations and reports directly to the Diocesan Bishop.

There are five objectives that motivated the reorganization:

- **accountability** -- the Canon will be responsible for the management of the diocesan operations.
- **definition** -- naming the collection of "strategic ministries," which are the ministries supported in large part by the diocesan budget and that operate outside of the jurisdiction of a parish.
- **comparison** -- tracking the allocation of diocesan resources between parishes and strategic ministries, and among the constituent members of each group.
- **flexibility** -- allowing the diocesan operations to respond to circumstances as they arise during the year.
- **robustness** -- having an organizational structure that accommodates different strategic priorities without having to overhaul the organization.



Episcopal Oversight and Responsibilities

With this reorganization comes a realignment of the responsibilities and activities of the three bishops. Here is a quick summary of the key changes:

- Oversight of congregations and deaneries is now aligned with visitation schedules. Each bishop covers four deaneries and their congregations, and the areas of oversight include visitations, congregational vitality and viability, admission of parishes and missions, and parish conflict.
- There are specialized roles for each bishop in certain aspects of congregational and clergy life, including transition ministry (Bp. Cederholm), clergy development (Bp. Harris), and pastoral oversight of parish closings (Bp. Shaw).
- The oversight of strategic ministries is distributed among the three bishops.
- There are specific assignments (shared in many instances) for episcopal leadership in diocesan events, committee work, and conventions.



Budget Overview

Core versus Supplemental Budgets

This year's presentation of the diocesan budget builds on the work of recent years' budget committee deliberations and presentations. In particular, it 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.

A Financial Reserve for 2009

In looking ahead to 2009, the bishops and the budget committee see a challenging economic environment. Energy costs will be higher, which will directly and indirectly lead to fewer funds available to support parish ministries.

In response, we have prepared a budget that meets these challenges with a new level of financial and programmatic discipline. This is not a business as usual budget, but instead an intentional scaling back of staff and programs so that we may be sure to have the financial resources and flexibility to address our most important priorities.

Through these savings, we are able to present a diocesan budget with identified expenses less than projected income. The purpose of this budgeted reserve is not to add to "savings," but instead to provide the diocesan leadership -- the bishops and the Diocesan Council -- with funds available to address the needs of the upcoming year.

| | |
|-------------------------------|--------------|
| Total Core Operating Income: | \$ 6,937,871 |
| Total Core Operating Expense: | 6,809,779 |
| Unallocated Core Reserve: | 128,092 |

Key Factors Leading to the Creation of the Unallocated Core Reserve

Six significant changes that contributed to the creation of the unallocated reserve are:

(1) a new spending policy for trust income made possible by a recent court ruling, allowing for a 4% draw on trusts; the increase in trust income for 2009 offsets a projected decline in assessments and in agency income.

(2) staff and program cuts in diocesan communications. The office of communications will be eliminated in 2009, including two staff positions of director and electronic media manager. The Canon to the Ordinary will be the initial contact person for press inquiries. The technical development of the diocesan web presence will be outsourced, and diocesan communications, including the Episcopal Times, FYI, and e-news, will be coordinated through the Congregational Resources and Training area.

(3) reductions in the core operating costs of youth ministry, Micah Project intern program, and college chaplaincies. The compensation expense for the diocesan youth minister will be less in 2009 than in 2008, and the program will rely more on supplemental funds. The director of the relational evangelism project will also oversee the Micah Project in the fall of 2009, eliminating the cost of a separate director. The Framingham chaplaincy is entering a transition period, and at the time of this writing the parishes in the Concord River Deanery are examining models for supporting this ministry. The Boston University chaplaincy is in the midst of an interim year with reduced expenses projected for 2009.

(4) elimination of the assistant controller position in the Administrative Services area. This change was implemented in 2008 after the adoption of the 2008 budget.

(5) elimination of the diocesan grant to support the Episcopal City Mission's public policy program. The diocesan support to Episcopal City Mission for the Burgess Urban Fund is funded at the same level.

(6) reduced funding for the Congregational Development Grant program and the Sending Serving Grant program. Expanding an initiative begun in 2008, the Sending Serving Grant program will be run entirely by the 12 deaneries, and the amount per deanery is increased to \$4,000 from the 2008 level of \$3,000.

Clearly, these cuts go beyond cutting "fat" and start to cut "muscle" as well. The budget committee accepts this as an appropriate response to the extraordinary challenges that congregations may face in 2009.

New and Expanded Ministry Areas for 2009

A few areas of the core operating budget have been increased, most notably:

- A new staff position is created for the Deaneries, Congregations, and Clergy area, to assist with transition ministry particularly in urban areas. This person may also be a resource available to the Congregational Resources and Training area.
- Two urban ministries are receiving support for their clergy. The Dorchester Partnership, a joint effort between St. Mark's and St. Mary's, is receiving support for its clergy from the core operating budget; part of this support is coming from the Cox Fellowship, which traditionally has been based at the Cathedral. In Salem, the work of the Rev. Daniel Vélez-Rivera will be supported for the second half of 2009, after his Urban Residency grant ends.

Other Factors

Health insurance premiums will go up in 2009. While the final rate schedule is not set yet, this budget anticipates a 10% increase over 2008 rates.

THE NEW ORGANIZATION OF DIOCESAN OPERATIONS

This section describes the activities of the five new areas of organization.



Deaneries, Congregations, and Clergy

The Deaneries, Congregations, and Clergy area deals with individual congregation and clergy issues, as well as provides support for the regional deanery structure. Each of the three bishops will have oversight of four deaneries and their congregations aligned with their visitation schedules.

Activities:

- **Episcopal and diocesan oversight** of congregations and clergy. Bishops' visitations, and assistance to congregations and clergy during times of transition and conflict.
- Diocesan programs supporting the life cycle of a clergy vocation. Support of the clergy vocation starts with the work of the **Commission on Ministry**, continues with **deployment**, **Fresh Start** (a resource for clergy beginning new ministry), **sabbaticals**, and **continuing education**, and includes grant and benefit programs for retired clergy, clergy dependents, and spouses. Additional funding for programs and services for clergy is provided apart from the operating budget through the Bishop's discretionary funds.
- **Deaneries**, as the canonically defined organizational framework for the congregations of the Diocese. These activities include the work of the deans, the deanery assemblies, and the deanery confirmations.



Congregational Resources and Training

The Congregational Resources and Training area houses all the diocesan operations that support the mission strategy goal of "providing practical resources and training opportunities for congregations in evangelism, stewardship and congregational development and Christian formation." In the past, congregational development was very closely tied to the clergy deployment process, and Christian formation was run as a separate department. In this alignment all of these are brought into one place, and there will be a new Director of Congregational Resources and Training hired.

The Congregational Resources and Training area will include the **diocesan grants programs**, the diocesan-sponsored **events and workshops**, the internal **staff** resources available to support and coach the congregations, and the external **consultants** and other diocesan-sponsored resources available to congregations.



Strategic Ministries

The Strategic Ministries area houses all the ministries that receive substantial support from the diocesan operating budget and that operate outside parish jurisdiction, or that are otherwise key initiatives of the Diocese. Included in this area are the **sponsored missions** (and their vicars and other leaders), the **young adult and college ministry** programs (chaplains, relational evangelism, Micah interns), support for **ethnic congregations** (Chinese, Hispanic, African ministries), support for the **urban residents, mission partnerships** (including Jubilee, Gulf Coast Partnership, Committee on Palestine and Israel, B-SAFE), and a few other ministries supported through income from long-standing trusts.

Most strategic ministries programs listed above receive some if not all of their funding outside of the core operating budget. Two of the newest programs, still in their pilot stages, are the **relational evangelism** program and a ministry to **veterans** of the Iraq and Afghanistan wars.

The Strategic Ministries area is also a relevant point of contact between the diocesan operations and closely affiliated organizations, such as Episcopal City Mission, the Barbara C. Harris Camp and Conference Center, and the Cathedral Church of St. Paul.



Episcopal and Diocesan Support

The Episcopal and Diocesan Support area includes what it takes to run a diocese regardless of the particular mission strategy focus. This includes **Convention, Diocesan Council, Standing Committee, the Archives, and the cost of producing the Episcopal Times and FYI**. This area also holds the **assessment** for the Episcopal Church.



Administrative Services

The Administrative Services area includes the **treasurer's office, information technology, and human resources**. The treasurer's office handles financial records for the Cathedral and the Trustees of Donations, and administers the diocesan health insurance program, and receives fee income for these services.



Diocesan Office Leadership

The bishops and the Canon to the Ordinary compose the leadership team for the diocesan operations, with oversight responsibilities that touch all five areas.

ORGANIZATION OF DIOCESAN OPERATIONS

Leadership Team: Bishops Shaw, Cederholm, and Harris & Canon to the Ordinary

| Deaneries, Congregations & Clergy | Congregational Resources & Training | Strategic Ministries | Episcopal & Diocesan Support | Administrative Services |
|---|--|---|---|------------------------------------|
| Oversight of congregations and clergy (including clergy transition & deployment & programs supporting clergy vocations) | Grant programs Learning events & workshops | Diocesan-sponsored missions & leadership | Diocesan Convention & Council | Treasurer's Office |
| Commission on Ministry | Staff resources to support & coach congregations | Youth ministry | Standing Committee | Information technology |
| Deaneries | External consultants & resources | Young adult & college ministry | Archives | Human resources |
| | Publications | Relational evangelism program | Development | |
| | | Ethnic congregations | | |
| | | Urban residents | | |
| | | Mission partnerships (including Jubilee, Gulf Coast Partnership, Committee on Palestine-Israel, B-SAFE) | | |
| | | Ministry to veterans | | |

COMPARISON OF THE 2009 CORE OPERATING BUDGET TO 2008 & 2007

Since the new organizational structure differs significantly from the previous one, presenting budget numbers for comparison across years requires some interpretation. The numbers presented here should be regarded as a good faith effort to recast previous years' budgets in light of the new organization. Furthermore, the actual numbers used for 2007 are drawn from records available before the final audit was completed and thus are preliminary.

| | 2009 Budget | 2008 Budget | 2007 Preliminary |
|--|------------------------|------------------------|-----------------------------|
| TOTAL OPERATING INCOME | \$ 6,947,871 | \$ 7,643,644 | \$ 7,872,810 |
| Assessments | 5,185,000 | 5,223,000 | 5,267,597 |
| Interest Income | 50,000 | 90,000 | 73,237 |
| Agency Income | 807,511 | 832,072 | 798,866 |
| Trust Income | 905,360 | 801,172 | 756,612 |
| Other Income (approximate) | 0 | 697,400 | 976,498 |
| TOTAL OPERATING EXPENSE | \$ 6,809,779 | \$ 7,643,644 | \$ 7,903,253 |
| Deaneries, Congregations, and Clergy | 985,396 | 856,600 | 826,089 |
| <i>Staff</i> | 585,696 | 494,500 | 477,332 |
| <i>Office, travel, and hospitality</i> | 25,000 | 31,000 | 22,658 |
| <i>Deanery programs and support</i> | 78,000 | 69,900 | 71,989 |
| <i>Transition grants</i> | 9,000 | 10,000 | 4,063 |
| <i>Commission on Ministry program</i> | 72,000 | 58,000 | 72,576 |
| <i>Clergy programs and events</i> | 28,500 | 8,500 | 12,093 |
| <i>Clergy grants and support services</i> | 187,200 | 184,700 | 165,378 |
| Congregational Resources and Training | 966,379 | 997,200 | 1,133,943 |
| <i>Staff</i> | 379,779 | 228,800 | 411,320 |
| <i>Office, travel, and hospitality</i> | 6,000 | 0 | 0 |
| <i>Congregational grants programs</i> | 438,600 | 661,300 | 615,446 |
| <i>Events and workshops</i> | 77,000 | 85,100 | 87,237 |
| <i>Resource services</i> | 65,000 | 22,000 | 19,940 |
| Strategic Ministries | 1,392,900 | 1,629,200 | 1,711,862 |
| <i>Sponsored missions</i> | 341,000 | 319,100 | 300,749 |
| <i>Urban parishes</i> | 184,000 | 70,000 | 70,000 |
| <i>Ethnic ministries</i> | 192,000 | 146,500 | 144,087 |
| <i>College chaplaincies</i> | 324,900 | 366,500 | 360,288 |
| <i>Intern programs</i> | 75,000 | 205,500 | 39,876 |
| <i>Youth programs</i> | 102,000 | 234,500 | 258,162 |
| <i>Mission initiative grants</i> | 64,000 | 67,700 | 231,224 |
| <i>Grants to related organizations</i> | 110,000 | 219,400 | 307,476 |

| | 2009 Budget | 2008 Budget | 2007 Preliminary |
|---|------------------------|------------------------|-----------------------------|
| Episcopal and Diocesan Support | 1,727,552 | 2,338,200 | 2,409,484 |
| <i>Staff</i> | 122,952 | 571,600 | 562,538 |
| <i>Office, travel, and hospitality</i> | 5,000 | 7,000 | 0 |
| <i>Bishop Shaw expenses</i> | 70,000 | 69,000 | 73,298 |
| <i>Bishop Cederholm expenses</i> | 36,000 | 33,000 | 25,397 |
| <i>Bishop Harris expenses</i> | 36,000 | 33,000 | 40,833 |
| <i>Assisting bishops</i> | 6,500 | 6,500 | 5,800 |
| <i>Convention</i> | 45,000 | 32,000 | 40,098 |
| <i>Polity administrative support</i> | 28,000 | 24,000 | 22,158 |
| <i>Archives programs</i> | 7,200 | 7,200 | 4,896 |
| <i>Communication programs</i> | 90,300 | 193,600 | 199,369 |
| <i>Development programs (off-line '09)</i> | 0 | 78,600 | 69,420 |
| <i>Legal expenses</i> | 55,000 | 55,000 | 169,119 |
| <i>Episcopal Church assessment</i> | 1,190,000 | 1,198,700 | 1,168,058 |
| <i>Province I assessment and program</i> | 15,600 | 14,000 | 13,500 |
| <i>General Convention</i> | 20,000 | 15,000 | 15,000 |
| Administrative Services | 1,076,371 | 1,176,744 | 1,310,652 |
| <i>Staff</i> | 536,671 | 703,200 | 748,220 |
| <i>Office, travel, and hospitality</i> | 20,000 | 20,600 | 54,354 |
| <i>Information technology</i> | 153,000 | 103,700 | 86,967 |
| <i>Lease payment</i> | 345,000 | 365,000 | 356,758 |
| <i>Financial and insurance services</i> | 136,000 | 157,500 | 183,771 |
| <i>Telephone</i> | 24,000 | 24,000 | 23,543 |
| <i>Other office expenses</i> | 86,000 | 15,000 | 47,747 |
| <i>Contingencies & capital reserves</i> | 0 | 12,044 | 36,600 |
| <i>Fee income for services</i> | (224,300) | (224,300) | (227,308) |
| Diocesan Office Leadership | 671,181 | 645,700 | 511,223 |
| <i>Bishop Shaw</i> | 202,654 | 201,900 | 195,904 |
| <i>Bishop Cederholm</i> | 172,487 | 171,000 | 167,206 |
| <i>Bishop Harris</i> | 153,566 | 152,800 | 148,113 |
| <i>Canon to the Ordinary</i> | 142,474 | 120,000 | 0 |
| OPERATING RESERVE/(DEFICIT) | 128,092 | 0 | (30,443) |

SUPPLEMENTAL SOURCES AND USES

As described in the Budget Overview section, this year's budget process has constructed a core operating budget that is financed solely by assessments and investment income. This reverses a practice begun several years ago in which the diocesan budget presented to Convention required additional funding from projected annual fund revenue and from contributions from the Diocesan Bishop's discretionary funds.

This does not mean that our commitment to mission strategy is limited to what we can spend from our assessments and endowment income. To the contrary, the strength of our commitment to mission strategy is demonstrated by the fact that we attract additional sources of funding to pursue and achieve these goals.

The annual fund is an important source of funds for our mission strategy. The annual fund provides critical supplements to ministries such as the B-SAFE program, the Urban Residents program, the young adult and college chaplaincies, and other mission partnerships. We expect at least \$200,000 will be available in 2009 from the annual fund to provide these supplements. In addition, the Urban Residents program in 2009 will continue to draw funds from ongoing dedicated fundraising efforts conducted since 2004.

Another type of supplemental funding is the \$90,000 grant from Trinity Wall Street for the second year of the Relational Evangelism program. The investment we are making into innovative programs directly related to our future growth opportunities are being noticed by others beyond our diocesan borders, and are opening up new sources of funding. The Relational Evangelism program aims to attract at least another \$150,000 in gifts and grants in order to execute its expansion and development plan.

A temporary source of funds relevant to the 2009 diocesan operations is the pending return of the diocesan investment in the Pelham Fund. In the spring of 2008, the Executive Committee of Diocesan Council approved a request by the Bishop to use the returned proceeds to support what is now known as the Dorchester Partnership between St. Mark's and St. Mary's churches. The total amount of the funds returned is \$150,000, and the plan for 2009 is to use \$44,000 of those funds, reserving the remaining amount for subsequent years.

Distinct from the diocesan agency and trust funds, the Bishop owns endowment funds that provide discretionary income. To the extent that the Bishop offers these funds to support mission strategy programs, they deserve mention and recognition here. (These funds are often referred to as "the BDF," standing for Bishop's Discretionary Funds.)

The largest allocation of Bishop's Discretionary Funds relevant to the core operating budget is the removal of the development office (for fundraising) from the core operating budget, and its funding through the BDF. The budget for the development office, including staff, for 2009 is \$260,000. The combined goal for the annual fund and other

dedicated campaigns in 2009 is in excess of \$500,000. (This figure includes amounts referenced in previous paragraphs.) By assuring the funding of the work of the development office through the BDF, our contributors can be assured that their gifts will be directed to their intended programs without diversion.

The BDF is also a source of funding for a new pilot ministry to returning veterans of the Iraq and Afghanistan wars. The Rev. Rob Bacon, a former Navy Seal (as well as former diocesan youth director), will undertake this new effort, and the initial budget through the BDF for 2009 is \$120,000.

The core budget projections reflect the budget committee's effort to apply a more uniform approach to funding for diocesan vicars and other ministry clergy. Emphasizing the discretionary nature of these funds, the Bishop intends to supplement the salaries of a few clergy above what is provided by the committee's uniform approach.



The purpose of this section has been to explain how we are growing our mission strategy initiatives while we are shrinking our definition of a (core) diocesan budget by about \$1 million. The answer is that we are relying on a variety of supplemental sources of funds.

From one perspective, this will appear to be a shuffling of the accounting. Indeed, a legitimate concern is that the removal of activities from the core budget may reduce their visibility and hence the ability of the Diocesan Council and others to oversee them, and this section is meant to address that specific concern.

But from another perspective, the separation between core and supplemental budgets has important positive consequences and implications. It forces us to focus on what can be funded through our assessments and investment income, and in doing so, it reminds us of the importance of developing additional sources of funding. To those who are potential financial supporters of our mission strategy initiatives, this distinction in our budgets provides needed assurance that the gifts will be directed to specific programs.

CORE AND SUPPLEMENTAL UNALLOCATED RESERVES

As the Bishop describes in his introductory letter, in response to the concerns raised in visitations about the worsening economic conditions, he pushed the budget committee to prepare a budget that provides the bishops and Diocesan Council some ability to respond as congregations work through the winter months. This section describes what the budget committee has forwarded in response.

First, as the earlier sections make clear, the projected 2009 revenues exceed the projected expenses by more than \$120,000. This is the first source of financial flexibility and reserves available.

Second, after reviewing the intended uses of the annual fund and relying on historical projections of our development capabilities, the committee sees some potential for enlisting the annual fund in this effort. More specifically, Bishop Cederholm has proposed the creation of a \$100,000 fund to support energy savings initiatives in our congregations. The bishops and Council could work on this or a variation of this idea, and there is reason to believe the funds could be raised as part of our larger, ongoing annual fund.

Third, the committee draws attention to an accumulated reserve within the House of Mercy agency funds. The trust documents governing these funds restrict their use to “women in need and their children.” There is about \$140,000 accumulated unspent income and another \$40,000 in projected income for 2009.

As of last year, prior to the unfolding of our current economic crisis, the Sending Serving Grants committee was soliciting new project proposals for the House of Mercy funds. Only a few proposals were received; now, the budget committee proposes to Diocesan Council (and the Sending Serving Grants committee) a different approach: that instead of new programs being initiated with these funds, parishes be solicited about whether or not they have ongoing programs within their parish budgets that meet the terms of the trust. Thus these funds could be distributed widely to parishes in order that those programs continue in 2009 without drawing on the parishes’ own sources of income in 2009. That is, by providing some funding for programs through the House of Mercy accumulated funds, each participating parish would have some money freed up to cover other parts of their budgets.

In summary, these three initiatives could potentially provide the bishops and Council with \$400,000 to address the particular needs and concerns of 2009:

| | |
|-----------------------------|------------|
| Unallocated core reserve | \$ 120,000 |
| Targeted annual fund appeal | 100,000 |
| House of Mercy reserves | 180,000 |
| Total: | \$ 400,000 |

TO: Delegates to the Diocesan Convention
FROM: The Treasurer's Office
DATE: October 3, 2008
SUBJECT: 2009 Assessment

We are pleased to provide the attached list of assessments for fiscal year 2009 to the Delegates of Diocesan Convention. This list reflects your actual 2009 assessment, based on your 2006 Parochial Report.

The formula for 2009 remains unchanged from 2008.

If a congregation has not filed a 2006 Parochial Report, the assessment number for 2009 is increased by 6% from 2008.

The attached list represents information that was available through September 30, 2008.

Note that the "Assessments and Voluntary Contributions" in the budget (\$5,185,000.) differs from the assessment total listed here (\$5,246,978.). The budget line reflects an accounting for normal reserve.

The following list of assessments is placed before Diocesan Convention for your action.

EPISCOPAL DIOCESE OF MASSACHUSETTS

2009 Congregational Assessment

| Church Code | Church Name | Church Town | Proposed 2009 Assessment |
|-------------|---------------------------------------|------------------------|--------------------------|
| 2005 | Church of the Good Shepherd | Acton | \$44,806 |
| 1005 | St. James's Church | Amesbury | \$9,679 |
| 1010 | Christ Church | Andover | \$85,848 |
| 2010 | Church of Our Saviour | Arlington | \$12,278 |
| 2015 | St. John's Church | Arlington | \$15,332 |
| 5005 | All Saints' Church | Attleboro | \$9,589 |
| 2020 | St. Andrew's Church | Ayer | \$12,408 |
| 6005 | St. Mary's Church | Barnstable | \$63,303 |
| 2025 | St. Paul's Church | Bedford | \$19,203 |
| 2030 | All Saints' Church | Belmont | \$37,343 |
| 1021 | St. Peter's Church | Beverly | \$29,899 |
| 1015 | St. John's Church | Beverly Farms | \$93,914 |
| 4045 | Church of St. John the Evangelist | Boston | \$17,761 |
| 4010 | Church of the Advent | Boston | \$141,348 |
| 4025 | Emmanuel Church | Boston | \$51,380 |
| 4070 | St. Stephen's Church | Boston | \$4,241 |
| 4075 | Trinity Church | Boston | \$583,932 |
| 3025 | St. Luke's & St. Margaret's Church | Boston (Allston) | \$2,398 |
| 4015 | All Saints' Church | Boston (Ashmont) | \$50,855 |
| 1030 | St. John's Church | Boston (Charlestown) | \$8,846 |
| 4055 | St. Mark's Church | Boston (Dorchester) | \$12,335 |
| 4060 | St. Mary's Church | Boston (Dorchester) | \$6,840 |
| 1025 | St. Andrew's/Grace Church Fed. | Boston (East) | \$114 |
| 3005 | Christ Church | Boston (Hyde Park) | \$6,788 |
| 3020 | St. John's Church | Boston (Jamaica Plain) | \$13,839 |
| 4030 | Church of the Holy Spirit | Boston (Mattapan) | \$24,804 |
| 4035 | St. Augustine's & St. Martin's Church | Boston (Roxbury) | \$13,317 |
| 4040 | St. Cyprian's Church | Boston (Roxbury) | \$4,900 |
| 4050 | St. John's & St. James's Church | Boston (Roxbury) | \$4,116 |
| 3010 | Emmanuel Church | Boston (W. Roxbury) | \$3,952 |
| 4080 | Emmanuel Church | Braintree | \$9,049 |
| 5010 | Trinity Church | Bridgewater | \$11,481 |
| 5015 | St. Paul's Church | Brockton | \$3,261 |
| 3030 | All Saints' Church | Brookline | \$65,176 |

EPISCOPAL DIOCESE OF MASSACHUSETTS

2009 Congregational Assessment

| Church Code | Church Name | Church Town | Proposed 2009 Assessment |
|----------------|-----------------------------------|-----------------------|--------------------------------|
| 3035 | Church of Our Saviour | Brookline | \$41,146 |
| 3015 | Iglesia de San Juan | Brookline | \$2,200 |
| 3045 | St. Paul's Church | Brookline | \$50,510 |
| 2045 | St. Mark's Church | Burlington | \$7,947 |
| 6010 | St. Peter's Church | Buzzard's Bay | \$12,249 |
| 2050 | Christ Church | Cambridge | \$97,783 |
| 2055 | St. Bartholomew's Church | Cambridge | \$21,551 |
| 2060 | St. James's Church | Cambridge | \$34,864 |
| 2065 | St. Peter's Church | Cambridge | \$30,103 |
| 4085 | Trinity Church | Canton | \$10,534 |
| 6015 | St. Christopher's Church | Chatham | \$60,985 |
| 2070 | All Saints' Church | Chelmsford | \$33,037 |
| 1035 | St. Luke's Church | Chelsea | \$6,961 |
| 4090 | St. Stephen's Church | Cohasset | \$53,910 |
| 2075 | Trinity Church | Concord | \$91,024 |
| 1041 | Calvary Church | Danvers | \$15,656 |
| 5020 | St. Peter's Church | Dartmouth (South) | \$7,648 |
| 3050 | Church of the Good Shepherd | Dedham | \$6,977 |
| 3055 | St. Paul's Church | Dedham | \$46,898 |
| 3060 | St. Dunstan's Church | Dover | \$21,636 |
| 4095 | Church of St. John the Evangelist | Duxbury | \$54,823 |
| 6020 | St. Andrew's Church | Edgartown | \$36,831 |
| 1045 | Grace Church | Everett | \$2,699 |
| 5030 | Church of the Good Shepherd | Fairhaven | \$2,314 |
| 5035 | Church of the Holy Spirit | Fall River | \$36,771 |
| 5045 | St. Luke's Church | Fall River | \$1,977 |
| 6030 | St. Barnabas's Church | Falmouth | \$70,038 |
| 6025 | Church of the Messiah | Falmouth (Woods Hole) | \$16,181 |
| 5060 | St. Mark's Church | Foxboro | \$25,878 |
| 3065 | St. Andrew's Church | Framingham | \$39,420 |
| 3070 | St. John's Church | Franklin | \$8,014 |
| 1050 | St. John's Church | Gloucester | \$37,954 |
| 1055 | St. James's Church | Groveland (South) | \$7,399 |
| 6035 | St. David's Church | Halifax | \$1,538 |

EPISCOPAL DIOCESE OF MASSACHUSETTS

2009 Congregational Assessment

| Church Code | Church Name | Church Town | Proposed 2009 Assessment |
|----------------|-----------------------------------|------------------|--------------------------------|
| 4100 | St. Andrew's Church | Hanover | \$16,445 |
| 6040 | Christ Church | Harwichport | \$46,092 |
| 1065 | Trinity Church | Haverhill | \$25,454 |
| 4105 | St. John's Church | Hingham | \$53,178 |
| 4110 | St. John's Church | Holbrook | \$4,682 |
| 3075 | St. Michael's Church | Holliston | \$11,329 |
| 3080 | St. Paul's Church | Hopkinton | \$9,566 |
| 2080 | St. Luke's Church | Hudson | \$4,634 |
| 1070 | Ascension Memorial Church | Ipswich | \$26,158 |
| 1075 | Grace Church | Lawrence | \$14,888 |
| 1080 | St. Augustine's Church | Lawrence | \$1,163 |
| 2085 | Church of Our Redeemer | Lexington | \$49,312 |
| 2090 | St. Anne's Church | Lincoln | \$72,617 |
| 2095 | St. Anne's Church | Lowell | \$9,648 |
| 2100 | St. John's Church | Lowell | \$4,526 |
| 1085 | St. Alban's Church | Lynn | \$1,764 |
| 1090 | St. Stephen's Church | Lynn | \$39,368 |
| 1095 | St. Paul's Church | Lynnfield | \$13,898 |
| 1100 | St. Luke's Church | Malden | \$1,890 |
| 1105 | St. Paul's Church | Malden | \$9,795 |
| 5065 | Church of St. John the Evangelist | Mansfield | \$4,886 |
| 1110 | St. Andrew's Church | Marblehead | \$56,653 |
| 1116 | St. Michael's Church | Marblehead | \$37,993 |
| 5070 | St. Gabriel's Church | Marion | \$44,339 |
| 4120 | Trinity Church | Marshfield Hills | \$14,212 |
| 3085 | Church of the Advent | Medfield | \$28,936 |
| 2115 | Grace Church | Medford | \$23,995 |
| 3090 | Christ Church | Medway | \$6,291 |
| 1120 | Trinity Church | Melrose | \$23,674 |
| 1125 | St. Andrew's Church | Methuen | \$5,331 |
| 5075 | Church of Our Saviour | Middleboro | \$20,163 |
| 3095 | St. Paul's Church | Millis | \$8,248 |
| 4125 | Church of Our Saviour | Milton | \$10,208 |
| 4130 | St. Michael's Church | Milton | \$65,570 |

EPISCOPAL DIOCESE OF MASSACHUSETTS

2009 Congregational Assessment

| Church Code | Church Name | Church Town | Proposed 2009 Assessment |
|-------------|-----------------------------|-------------------------|--------------------------|
| 6045 | St. Paul's Church | Nantucket | \$75,568 |
| 3100 | St. Paul's Church | Natick | \$48,166 |
| 3105 | Christ Church | Needham | \$69,487 |
| 5080 | Grace Church | New Bedford | \$85,014 |
| 5085 | St. Andrew's Church | New Bedford | \$7,090 |
| 5090 | St. Martin's Church | New Bedford | \$5,738 |
| 1130 | St. Paul's Church | Newburyport | \$46,903 |
| 3110 | Grace Church | Newton | \$51,772 |
| 3120 | Church of the Messiah | Newton (Auburndale) | \$7,767 |
| 3125 | Church of Our Redeemer | Newton (Chestnut Hill) | \$96,886 |
| 3130 | St. John's Church | Newton (Newtonville) | \$19,553 |
| 3115 | Church of the Good Shepherd | Newton (Waban) | \$44,226 |
| 3145 | Trinity Church | Newton Centre | \$33,450 |
| 3135 | St. Paul's Church | Newton Highlands | \$11,514 |
| 3140 | St. Mary's Church | Newton Lower Falls | \$39,321 |
| 1135 | St. Paul's Church | North Andover | \$17,988 |
| 5095 | Grace Church | North Attleboro | \$25,258 |
| 2040 | St. Anne's Church | North Billerica | \$16,604 |
| 5025 | St. Mark's Church | North Easton | \$3,819 |
| 3150 | Grace Church | Norwood | \$17,570 |
| 6050 | Trinity Church | Oak Bluffs | \$1,195 |
| 6055 | Holy Spirit | Orleans | \$72,463 |
| 6060 | St. Peter's Church | Osterville (Barnstable) | \$68,400 |
| 1140 | St. Paul's Church | Peabody | \$7,102 |
| 2120 | St. David's Church | Pepperell | \$4,237 |
| 6065 | Christ Church | Plymouth | \$39,105 |
| 6070 | St. Mary's Church | Provincetown | \$13,512 |
| 4135 | Christ Church | Quincy | \$16,626 |
| 4140 | Parish of St. Chrysostom | Quincy (Wollaston) | \$10,053 |
| 4145 | Trinity Church | Randolph | \$16,184 |
| 1145 | Church of the Good Shepherd | Reading | \$18,837 |
| 4150 | Trinity Church | Rockland | \$4,493 |
| 1155 | St. Mary's Church | Rockport | \$15,780 |
| 1160 | Grace Church | Salem | \$17,027 |

EPISCOPAL DIOCESE OF MASSACHUSETTS

2009 Congregational Assessment

| Church Code | Church Name | Church Town | Proposed 2009 Assessment |
|-------------|-----------------------------|-------------------------|--------------------------|
| 1165 | St. Peter's Church | Salem | \$20,609 |
| 6075 | St. John's Church | Sandwich | \$34,058 |
| 1170 | St. John's Church | Saugus | \$10,239 |
| 4155 | St. Luke's Church | Scituate | \$25,497 |
| 5105 | St. John's Church | Sharon | \$2,905 |
| 2125 | Trinity Chapel | Shirley | \$3,098 |
| 5110 | Church of Our Saviour | Somerset | \$9,429 |
| 2130 | Christ Church | Somerville | \$5,219 |
| 2135 | St. James's Church | Somerville | \$5,244 |
| 1060 | Christ Church | South Hamilton & Wenham | \$110,166 |
| 4165 | Church of the Holy Nativity | South Weymouth | \$12,458 |
| 6095 | St. David's Church | South Yarmouth | \$33,301 |
| 3155 | St. Mark's Church | Southboro | \$44,195 |
| 1175 | All Saints' Church | Stoneham | \$5,978 |
| 4160 | Trinity Church | Stoughton | \$6,505 |
| 2140 | St. Elizabeth's Church | Sudbury | \$35,891 |
| 1180 | Church of the Holy Name | Swampscott | \$10,192 |
| 5115 | Christ Church | Swansea | \$17,214 |
| 5120 | St. John's Church | Taunton | \$4,426 |
| 5125 | St. Thomas's Church | Taunton | \$25,002 |
| 1185 | Trinity Church | Topsfield | \$35,728 |
| 6080 | Grace Church | Vineyard Haven | \$24,534 |
| 1190 | Emmanuel Church | Wakefield | \$5,997 |
| 3160 | Epiphany Church | Walpole | \$14,908 |
| 2145 | Christ Church | Waltham | \$22,488 |
| 6085 | Church of The Good Shepherd | Wareham | \$21,670 |
| 2150 | Church of the Good Shepherd | Watertown | \$5,538 |
| 2155 | Church of the Holy Spirit | Wayland | \$32,547 |
| 3165 | St. Andrew's Church | Wellesley | \$123,392 |
| 6090 | Chapel of St. James's | Wellfleet | \$836 |
| 1195 | All Saints' Church | West Newbury | \$2,292 |
| 2160 | St. Mark's Church | Westford | \$22,897 |
| 2165 | St. Peter's Church | Weston | \$59,106 |
| 3170 | St. John's Church | Westwood | \$19,793 |

EPISCOPAL DIOCESE OF MASSACHUSETTS

2009 Congregational Assessment

| Church Code | Church Name | Church Town | Proposed 2009 Assessment |
|----------------|------------------------|-------------|--------------------------------|
| 4170 | Trinity Church | Weymouth | \$6,665 |
| 5130 | All Saints' Church | Whitman | \$11,059 |
| 2170 | St. Elizabeth's Church | Wilmington | \$4,244 |
| 2175 | Parish of the Epiphany | Winchester | \$103,229 |
| 1200 | St. John's Church | Winthrop | \$17,333 |
| 2180 | Trinity Parish | Woburn | \$6,399 |
| 3175 | Trinity Church | Wrentham | \$19,292 |
| Total | | | \$5,246,978 |

Notice of 2009 Assessment
Your Church, Yourtown, MA
 Parish Code: 0000

2009 Assessment **\$25,867.**

(calculation follows)

Step-by-Step Computation

A. Compute Base

| | |
|--|------------------------------------|
| From your congregation's 2006 Parochial Report | |
| Line 14 "all other operating expenses" | A = \$195,000. |
| Line 7 "assistance from diocese" | B = \$5,000. |
| Line 14 minus Line 7 | A-B = \$190,000. |
| Your Base | <u> \$190,000.</u> |

2009 Assessment Formula Table

| Applicable Row | If Your Base is greater than or equal to | Then your computed assessment is | Plus this percent | Of Your Base in excess of |
|----------------|---|----------------------------------|-------------------|----------------------------------|
| | \$0 but less than \$37,276 | \$0 | 6.74% | \$0 |
| | \$37,276 less than \$74,552 | \$2,512 | 10.11% | \$37,276 |
| | \$74,552 less than \$111,827 | \$6,284 | 13.49% | \$74,552 |
| | \$111,827 less than \$149,103 | \$11,310 | 16.86% | \$111,827 |
| -> -> | \$149,103 less than \$223,655 | \$17,594 | 20.23% | \$149,103 |
| | \$223,655 less than \$298,206 | \$32,675 | 23.60% | \$298,206 |
| | \$298,206 and above | \$50,271 | 16.86% | \$298,206 |

B. Computing Assessment Using Table

| | |
|---|-----------------------------------|
| Using Assessment Table and Base (above) | |
| Assessment on \$149,103. | C = \$17,594. |
| Your base in excess of \$149,103. is \$ 40,897. | D = \$8,273. |
| This residual is assessed at 20.23% | |
| Computed Assessment | C + D= \$25,867. |
| Your Computed Assessment Using Table | <u> \$25,867.</u> |

C. Computing Your Transitional Cap (Your Actual Assessment is the lesser of Your Computed Assessment and Your Transitional Cap.*)

| | |
|---|-----------------------------------|
| Your Actual 2008 Assessment | E = \$24,500 |
| Your Transitional Cap (6%) | E + 6%E = \$25,970. |
| *NOTE: Your Computed Assessment is IS LESS THAN your Transitional Cap | |
| Your Actual 2009 Assessment = | <u> \$25,867.</u> |

2009 Assessment for 0000
Your Church
Yourtown

Actual 2009 Assessment = \$25,867.

Monthly Payment = \$2,155.62

The above calculation reflects information available to the Treasurer's Office on September 30, 2008. Please contact Treasurer's Office with updates or correction.

Your 2009 Assessment Rate = 13.61%
as a percentage of computed expenses

SPENDING PROJECTIONS USED TO DEVELOP THE 2009 CORE BUDGET

The motion to be placed before Convention is based on the one-page summary budget on page five of this booklet. This section provides the working documents used by the budget committee to prepare the budget, and they provide additional insight into the committee's deliberations. Some items can be forecast with a high degree of confidence; other items are reasonable projections with a much higher degree of uncertainty. The ultimate responsibility for the implementation of the budget, including changes as appropriate given new circumstances and information, rests with the diocesan leadership team with oversight by the Diocesan Council.

DEANERIES, CONGREGATIONS, AND CLERGY – projected expenses

| | | | |
|----|---|-----------|--|
| 1 | Staff | \$585,696 | Seven staff positions: canon for transition ministry; associate for transition ministry (new); three administrative assistants to the bishops; area administrative assistant; and staff officer for ordained vocations |
| 2 | Office, travel, and hospitality (and other support costs) | 25,000 | |
| 3 | Deanery programs and support | | |
| 4 | Stipend for deans' parishes | 60,000 | |
| 5 | Deanery programs and support | 12,000 | |
| 6 | Deanery confirmation support | 6,000 | |
| 7 | Transition grants | 9,000 | Previously called 'consulting grants for deployment' |
| 8 | Commission on Ministry | | |
| 9 | Recruitment | 7,000 | Ministry discernment conference and postulancy interviews |
| 10 | Canonical requirements | 17,000 | Includes Oxford Documents, psychological exams, GOE, etc. |
| 11 | Travel and training | 3,000 | For postulants and candidates |
| 12 | Retreats | 9,000 | |
| 13 | Ordination service expenses | 8,000 | |
| 14 | Diaconate program | 13,000 | |
| 15 | "Am I Called?" conference | 5,000 | |
| 16 | Office, travel, and hospitality | 5,000 | |
| 17 | Administrative support | 5,000 | |
| 18 | Clergy programs and events | | |
| 19 | Clergy Family Network | 6,000 | |
| 20 | Fresh Start program | 2,500 | |
| 21 | Reserve for other items | 20,000 | |
| 22 | Clergy grants and support services | | |
| 23 | Clergy sabbatical funds | 16,000 | |
| 24 | Continuing education | 8,000 | |
| 25 | Scholarship assistance | 45,200 | For clergy dependents |
| 26 | Benefit and pension support | 90,000 | For retired and aged clergy |
| 27 | Consulting chaplains | 8,000 | For retired clergy and their families |
| 28 | Other support costs | 20,000 | |
| 29 | | | |
| 30 | AREA TOTAL: | \$985,396 | |

CONGREGATIONAL RESOURCES AND TRAINING – projected expenses

| | | | |
|----|---|-----------|---|
| 1 | Staff | \$379,779 | Four staff positions: area director; congregational consultant; communications specialist; formation consultant |
| 2 | Office, travel, and hospitality (and other support costs) | 6,000 | |
| 3 | Congregational grant programs | | |
| 4 | Congregational Development-open | 140,000 | Reduction of 60,000 |
| 5 | Congregational Development-targeted | 70,000 | Reduction of 100,000 |
| 6 | Sending Serving matching grants | 48,000 | 4,000 per deanery |
| 7 | House of Mercy funds | 40,600 | Included in proposal to Council for special use in 2009 |
| 8 | Bristol County Case funds | 120,000 | |
| 9 | Formation grants | 20,000 | |
| 10 | Events and workshops | | |
| 11 | Resource Day | 20,000 | |
| 12 | Spring learning event | 18,000 | |
| 13 | Workshops and training | 17,000 | Includes anti-racism and Safe Church training |
| 14 | Other learning events and activities | 22,000 | Includes support for Adelynrood music program in June 2009 |
| 15 | Resource services | 65,000 | Available for external consultants, research services like Percept, communications services, etc. |
| 16 | | | |
| 17 | AREA TOTAL: | \$966,379 | |

STRATEGIC MINISTRIES – projected expenses

| | | | |
|----|---|-------------|---|
| 1 | Sponsored Missions | | Support for missions expressed in terms of a uniform rate of \$88,000 for full-time support |
| 2 | St. Paul's, Brockton (1.0) | \$88,000 | |
| 3 | St.Luke's/San Lucas, Chelsea (0.75) | 66,000 | |
| 4 | Christ Ch/San Juan, Hyde Park (0.5) | 44,000 | |
| 5 | Grace, Lawrence (0.25) | 22,000 | |
| 6 | St. Andrew's, Natick (0.375) | 33,000 | |
| 7 | St. Stephen's, South End (1.0) | 88,000 | |
| 8 | Urban parishes | | |
| 9 | Dorchester partnership with St. Mark's and St. Mary's | 44,000 | Supplemental support from Pelham Fund and BDF |
| 10 | Cox Fellow: Dorchester partnership | 70,000 | |
| 11 | Urban resident | 70,000 | 3 other urban residents funded through supplemental sources |
| 12 | Ethnic ministries | | |
| 13 | Cantonese canon/vicar | 88,000 | Supplemental support from BDF |
| 14 | Cantonese ministry 5 year grant | 20,000 | Support for Wollaston Chinese ministry |
| 15 | Cantonese ministry programs | 0 | Funded through congregational offerings and LIFE reserves |
| 16 | African ministries | 15,000 | |
| 17 | Hispanic ministries | 25,000 | |
| 18 | Post-urban residency period, Salem | 44,000 | |
| 19 | College chaplaincies | | |
| 20 | Chaplain MIT | 110,645 | |
| 21 | Chaplain BC/NU | 96,188 | |
| 22 | Chaplain BU | 44,000 | Interim in spring and part-time in fall |
| 23 | Framingham State | 36,000 | Transition during spring/summer |
| 24 | Chaplaincy programs | 38,067 | Plus supplements from annual fund |
| 25 | Intern programs | | |
| 26 | Micah Project | 40,000 | |
| 27 | Relational evangelism | 35,000 | Partial support for director |
| 28 | Youth programs | 102,000 | Plus supplements from annual fund |
| 29 | Mission initiative grants | | |
| 30 | Jubilee Ministry | 49,000 | 0.7% of core budget |
| 31 | Mission trip and partnerships support | 15,000 | |
| 32 | Grants to related organizations | | |
| 33 | EDS – MSASA | 14,400 | Scholarship for African students to Episcopal Divinity School |
| 34 | Cathedral Church of St. Paul | 3,200 | Radio ministry |
| 35 | Episcopal City Mission | 30,000 | Burgess Fund |
| 36 | UTO – American Indians | 2,400 | |
| 37 | Mass. Council of Churches | 50,000 | Annual grant |
| 38 | Other ministry support | 10,000 | |
| 39 | | | |
| 40 | AREA TOTAL: | \$1,392,900 | |

EPISCOPAL AND DIOCESAN SUPPORT – projected expenses

| | | | |
|----|-----------------------------------|-------------|--|
| 1 | Staff | \$122,952 | Two staff positions: assistant secretary and archivist |
| 2 | Office, travel, and hospitality | 5,000 | |
| 3 | Bishop Shaw expenses | 70,000 | |
| 4 | Bishop Cederholm expenses | 36,000 | |
| 5 | Bishop Harris expenses | 36,000 | |
| 6 | Assisting bishops | 6,500 | |
| 7 | Convention | 45,000 | |
| 8 | Polity administrative support | | |
| 9 | Diocesan Council support | 11,000 | |
| 10 | Standing Committee support | 3,000 | |
| 11 | Journals and diocesan directory | 11,000 | |
| 12 | Diocesan Youth Council support | 3,000 | |
| 13 | Communications programs | | |
| 14 | Episcopal Times production | 53,300 | Two issues in 2009 |
| 15 | Episcopal Times mailing | 22,000 | |
| 16 | FYI newsletter | 15,000 | |
| 17 | Legal expenses | 55,000 | |
| 18 | Episcopal Church assessment | 1,190,000 | |
| 19 | Province I assessment and program | 15,600 | |
| 20 | General Convention | 20,000 | |
| 21 | Archivist programs | 7,200 | |
| 22 | | | |
| 23 | AREA TOTAL: | \$1,727,552 | |

ADMINISTRATIVE SERVICES – projected expenses

| | | | |
|----|---|-------------|---|
| 1 | Staff | \$536,671 | Seven staff positions: assistant treasurer, controller, two accountants, payroll administrator, information technology manager, human resources manager |
| 2 | Office, travel, and hospitality | 20,000 | |
| 3 | Information technology | | |
| 4 | Development and hosting services | 75,000 | Includes outsourcing related to website |
| 5 | System administration consulting support and services | 48,000 | |
| 6 | Computer expenses | 30,000 | |
| 7 | Lease payment | 345,000 | |
| 8 | Financial and insurance services | 136,000 | |
| 9 | Telephone | 24,000 | |
| 10 | Other office expenses | | |
| 11 | Office equipment | 46,000 | |
| 12 | Unallocated office and utilities expense | 40,000 | |
| 13 | Fee income for services | | |
| 14 | Fees from Cathedral | (35,000) | |
| 15 | Fees from Mass. Church Agency | (100,000) | |
| 16 | Fees from Trustees of Donations | (69,300) | |
| 17 | Fees for Stokes loan program | (20,000) | |
| 18 | | | |
| 19 | AREA TOTAL: | \$1,076,371 | |

DIOCESAN OFFICE LEADERSHIP TEAM – projected compensation

| | | | |
|---|-----------------------|-----------|--------------|
| 1 | Bishop Shaw | \$202,654 | TCC: 166,000 |
| 2 | Bishop Cederholm | 172,487 | TCC: 134,600 |
| 3 | Bishop Harris | 153,566 | TCC: 124,400 |
| 4 | Canon to the Ordinary | 142,474 | TCC: 115,000 |
| 5 | | | |
| 6 | TOTAL: | \$671,181 | |