

APPROVED

PROPOSED 2017 BUDGET



## EMBRACING BRAVE CHANGE

*"Glory to God whose power, working in us,  
can do infinitely more than we can ask or imagine..."*  
Ephesians 3:20

Episcopal Diocese of Massachusetts | Holiday Inn, Mansfield

## Proposed 2017 Diocesan Budget

231st Annual Convention of the Episcopal Diocese of Massachusetts  
Holiday Inn, Mansfield



### Let us pray:

*Lord Jesus Christ, we come before you as a people of God,  
seeking to join your transforming work in the world.  
Open our eyes to see the movement of your Spirit.  
Open our minds to imagine new possibilities.  
Open our ears to hear the voices of all your children.  
Open our mouths to speak with honesty and love.  
Open our hands to share all that we have.  
Open our hearts to receive all that we need.  
Thank you, Lord, for calling us as your disciples and friends.  
Give us courage to follow where you lead. Amen.*

## Table of Contents

Letter of Introduction.....	3
Budget Overview.....	5
Summary of Core Budget.....	6
Summary of Supplemental Budget.....	7
Summary of Functional Expenses by Type.....	8
2017 Proposed Assessments by Deanery.....	9
Projected Revenue for 2017.....	15
Structure of Diocesan Operations.....	18
Projected Expenses for 2017 by Areas of Operation.....	19
Deaneries, Congregations and Clergy.....	20
Congregational Resources and Training.....	24
Strategic Ministries.....	28
Episcopal and Diocesan Support.....	34
Administrative Services.....	38
Proceeds from Closed Congregations: Additional Information.....	41
Together Now Campaign: Additional Information.....	44
Endowment Funds.....	48
Appendix 1: Agency Endowment Funds.....	53
Appendix 2: Trust Endowment Funds.....	54
Appendix 3: Bishop's Directed Funds.....	55
Appendix 4: Grants to Congregations in 2015.....	56
Appendix 5: Staff Roster.....	59

### **Budget Committee**

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

Lisa Garcia (2016), Treasurer

Stephen Voysey (2016), Chair

Matthew Cadwell (2017)

Ellen Sheehy (2017)

Barbara Williamson (2017)

Jane Bearden (2018)

Virginia Rogers (2018)

Ted Ts'o (2018)

Charles Jordan, Controller

William Parnell, Canon to the Ordinary

Laura Simons, Assistant Secretary

Gerry Sullivan, Chief Business Officer and Assistant Treasurer



## Episcopal Diocese of Massachusetts

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

Dear Friends in Christ,

This booklet presents the proposed budget for the Episcopal Diocese of Massachusetts for the calendar year 2017. Its overarching purpose is to provide you with both clarity and transparency with regard to the financial operations of the diocese. Along with the dollar amounts, we have included narratives which explain the budget line items.

During 2016, the people of the diocese have been engaged in the consideration of a new mission strategy, the results of which may be found elsewhere in the convention materials and on the diocesan Web site. The mission strategy provides guidance to us, as a diocesan family, with regard to the use of all our resources, including our financial priorities. As the mission strategy discernment process and the 2017 budget formation process were ongoing simultaneously, the 2017 budget generally continues program expenses according to the priorities of the existing mission strategy. Having said that, the proposed 2017 budget includes funds intended to cover start-up expenses for implementing elements of the new mission strategy. These funds are available to Diocesan Council to be directed as needs for such implementation arise during 2017.

The budget reflects the perceived priorities which we believe God is calling us to establish in the coming year, bearing in mind that it is God's abundance over which we have been given stewardship. A budget is also inevitably imperfect and incomplete due to human limitations. Putting a budget together is both a rewarding and a humbling experience, and relies on many people. We want to thank Acting Chief of Staff Sam Rodman and Canon to the Ordinary Bill Parnell, Chief Business Officer Gerry Sullivan, Controller Charles Jordan, Assistant Secretary Laura Simons, the Budget Committee members, participants at the budget hearings, ministry area leaders and members of Diocesan Council for their work and guidance once again this year. We are also grateful to Bishop Alan Gates and Bishop Gayle Harris for their clear priorities and support.

Having now completed two three-year terms on the Budget Committee, Stephen Voysey concludes his service as chair of the Budget Committee. Bishop Gates will be appointing a new chair and a new class of 2019 will be joining the committee going forward.

May God bless each of us as we strive to be good stewards of all the gifts which we have been given by the God of grace.

Lisa M. Garcia  
Treasurer

The Rev. Stephen O. Voysey  
Chair, Budget Committee



## **Budget Overview**

### Process

The Budget Committee, established by Diocesan Council to help prepare the annual budget, met monthly and held three open hearings in the spring—one about expenses and two to hear from representatives of strategic ministries. The bishops' funding priorities and input from staff and ministry area leaders also informed the preparation of this budget, as did the participation of Diocesan Council and the Financial Advisory Committee in discussions about budget issues and/or specific drafts.

### **Core and Supplemental Budgets**

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

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

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

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

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

MOVED, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts approve the schedule of 2017 Diocesan Revenues, Core and Supplemental, described in the Proposed 2017 Diocesan Budget and summarized on pages 6 and 7, including the schedule of individual parish and mission assessments for 2017 listed on pages 9 through 14, with the adjustments approved by the Assessment Coordinating Committee and the Diocesan Council on page 15.

MOVED, that the 231st Annual Convention of the Episcopal Diocese of Massachusetts approve the Schedule of 2017 Diocesan Expenses, Core and Supplemental, described in the Proposed 2017 Diocesan Budget and summarized on pages 6 and 7.

<b>Episcopal Diocese of Massachusetts</b>				
<b>Summary of Core Operations</b>				
<b>2017 Budget, 2016 Budget and 2015 Actual</b>				
	<b>CORE</b>			
	<b>2017</b>	<b>2016</b>	<b>Budget</b>	<b>2015</b>
	<b>Budget</b>	<b>Budget</b>	<b>Variance</b>	<b>Actual</b>
<u>Revenue</u>				
Assessments before adjustments	5,139,654	5,083,633	56,021	4,936,994
Less adjustments	(75,000)	(81,830)	6,830	(48,371)
Assessments after adjustments	5,064,654	5,001,803	62,851	4,888,623
Less reserve for Uncollected Assessments	(20,000)	(35,805)	15,805	(191,179)
Agency Fund draws	1,033,809	1,003,818	29,991	896,434
Trust Fund draws	867,489	818,465	49,024	1,408,077
Congregational contributions	58,000	58,000	-	45,250
Interest income	8,000	15,000	(7,000)	38,552
Dividend income	78,000	78,000	-	85,856
<b>Total Revenue</b>	<b>7,089,952</b>	<b>6,939,281</b>	<b>150,671</b>	<b>7,171,613</b>
<u>Expense</u>				
Deaneries, Congregations and Clergy	824,843	996,206	(171,363)	929,808
Congregational Resources and Training	1,203,029	1,210,089	(7,060)	1,037,524
Strategic Ministries	1,275,792	1,248,108	27,684	1,177,380
Episcopal and Diocesan Support	2,300,394	2,125,010	175,384	2,181,116
Administrative Services	1,485,894	1,359,868	126,026	1,327,796
	7,089,952	6,939,281	150,671	6,653,624
<b>Net surplus (deficit) - Core</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>517,989</b>

Episcopal Diocese of Massachusetts											
Supplemental Budget by Funding Source											
2017 Budget, 2016 Budget and 2015 Actual											
2017 Budget											
						Proceeds			Fee		2016
			Annual			from Closed					Budget
	2017 Budget	BDF Grants	Fund Grants	Contributions	Grants	Parishes	In Kind	Transfers	Revenue	TOTAL	TOTAL
1101	Making Excellent Disciples	20,000			-					20,000	20,000
1211	Sabbaticals	17,500						9,055		26,555	26,321
1212	Continuing Education	10,000								10,000	10,000
1221	Clergy Dependent Scholarships	33,337								33,337	33,337
1223	Dill Scholarship	3,359								3,359	3,264
1231	Support for Retired Clergy	5,500						(5,500)		-	-
1321	Fresh Start/New Call				8,333			(8,333)		-	-
1341	Clergy Family Network	1,000						(1,000)		-	-
2014	Congregational Program Grants	25,000	10,000							35,000	35,000
2221	Program Support	5,000								5,000	-
2222	Family Camp									-	-
3056	Life Together	45,938	102,062	69,000	95,000		65,000	75,000	257,000	709,000	781,000
3111	MIT Chaplaincy	3,363						(3,363)		-	-
3131	Boston College	250						(250)		-	-
3141	Northeastern	250						(250)		-	-
3221	Brockton, Grace Chapel					114,006				114,006	111,771
3311	Boston, Chinese Ministries			47,000	3,000					50,000	50,000
3321	Quincy, Chinese Ministries								10,000	10,000	10,000
3331	Dorchester, St. Mary's	50,000								50,000	50,000
3361	Watertown, Good Shepherd	30,000								30,000	45,000
3371	S. Dartmouth, St. Peter's The Bridge	45,000								45,000	65,000
3411	Urban Resident		11,719							11,719	11,719
3511	Jubilee Global Mission	3,575		30,784				45,000		79,359	75,784
3541	B-SAFE	125,000	125,000							250,000	225,000
3545	B-PEACE		50,000							50,000	50,000
3911	Cathedral Church of St. Paul	77,000								77,000	71,000
4311	Development	193,373						57,366		250,739	232,344
4312	Annual Fund		30,000							30,000	30,000
4343	Mission Hubs							200,000		200,000	200,000
		694,445	328,781	146,784	106,333	114,006	65,000	367,725	267,000	2,090,074	2,136,540
2015 Actual											
			Annual			Proceeds			Fee		
	2015 Actual	BDF Grants	Fund Grants	Contributions	Grants	Parishes	In Kind	Transfers	Revenue	TOTAL	
1101	Making Excellent Disciples	-			-					-	-
1211	Sabbaticals	17,500						(8,203)		9,297	
1212	Continuing Education	10,000						-		10,000	
1221	Clergy Dependent Scholarships	34,244		100						34,344	
1231	Support for Retired Clergy							5,300		5,300	
1311	Commission on Ministry	10,020								10,020	
1312	Seminarians			11,398				7,612		19,010	
1341	Clergy Family Network							1,000		1,000	
2014	Congregational Program Grants		10,000			43,077				53,077	
3056	Life Together	34,151	115,000	171,428	70,000		70,000	(75,000)	248,561	634,140	
3111	MIT Chaplaincy							3,108		3,108	
3221	Brockton, Grace Chapel					107,661				107,661	
3231	Chelsea, St. Luke's/San Lucas				37,340	-				37,340	
3251	South End, St. Stephen's		50,000							50,000	
3311	Boston, Chinese Congregation			48,524						48,524	
3321	Quincy, Chinese Congregation			13,000						13,000	
3331	Dorchester, St. Mary's	50,000								50,000	
3361	Watertown, Good Shepherd					60,000				60,000	
3411	Urban ResidentS	18,750								18,750	
3511	Jubilee Global Mission			-				-		-	
3541	B-SAFE	100,000	125,000							225,000	
3545	B-PEACE		50,000	-						50,000	
3911	Cathedral Church of St. Paul	65,000								65,000	
4012	Suffragan Bishop									-	
4311	Development	161,839	26,000					58,000		245,839	
4312	Annual Fund		-	(170,081)						(170,081)	
4343	Mission Hubs							-		-	
		501,504	376,000	74,369	107,340	210,738	70,000	(8,183)	248,561	1,580,329	



### Summary of Functional Expenses by Type

	2017 Budget		2016 Budget		2015 Actual	
	Budget	% of total	Budget	% of total	Actual	% of total
<b>CORE BUDGET</b>						
Program expenses	2,309,701	33%	2,368,330	34%	2,235,902	34%
Compensation and benefits	3,470,412	49%	3,394,224	49%	3,221,329	48%
Operational and support services	1,378,841	19%	1,316,316	19%	1,344,533	20%
Management and professional services	245,200	3%	253,200	4%	255,849	4%
Total expenses	7,404,154	104%	7,332,070	106%	7,057,613	106%
Less fees and other transfers	(314,202)	-4%	(392,789)	-6%	(383,990)	-6%
Net functional expenses	7,089,952	100%	6,939,281	100%	6,673,623	100%
<b>SUPPLEMENTAL BUDGET</b>						
Program expenses	1,019,620	49%	1,021,541	48%	796,005	30%
Compensation and benefits	858,516	41%	784,912	37%	1,425,263	53%
Operational and support services	179,000	9%	318,087	15%	424,253	16%
Management and professional services	32,938	2%	12,000	1%	44,838	2%
Total expenses	2,090,074	100%	2,136,540	100%	2,690,359	100%

**2017 ASSESSMENTS BY DEANERY**

CODE  
M?  
BASE  
FORMULA ASSESSMENT  
ADJUSTMENT  
ASSESSMENT  
EFFECTIVE RATE  
PRIOR YEAR ASSESSMENT  
DIFFERENCE  
PRIOR YEAR ADJUSTMENT

diocesan church code  
"M" if a mission  
line 14 less line 7 from the 2014 Parochial Report  
15.5% \* BASE, LESS \$6,000  
initially 0; determined by committee and council  
formula less adjustment - THIS IS WHAT CONVENTION VOTES  
the proposed assessment divided by the BASE, expressed as a percent  
after any adjustment  
between 2017 proposed and 2016 prior year assessments  
amount of any adjustment received prior year

**ALEWIFE**

CODE	M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
2010	Arlington, Church of Our Saviour	136,123	15,099	2,172	12,927	9.5	15,561	-2,634	0
2015	Arlington, St. John's Church	186,560	22,917	3,241	19,676	10.5	22,251	-2,575	2,782
2025	Bedford, St. Paul's Church	188,661	23,242	0	23,242	12.3	22,382	860	0
2030	Belmont, All Saints' Church	220,781	28,221	0	28,221	12.8	28,154	67	0
2045	Burlington, St. Mark's Church	89,692	7,902	0	7,902	8.8	10,209	-2,307	0
2050	Cambridge, Christ Church	755,996	111,179	0	111,179	14.7	94,623	16,556	0
2055	Cambridge, St. Bartholomew's Church	182,652	22,311	0	22,311	12.2	20,583	1,728	0
2060	Cambridge, St. James's Church	389,956	54,443	0	54,443	14.0	45,626	8,818	0
2065	Cambridge, St. Peter's Church	252,993	33,214	0	33,214	13.1	32,908	306	0
2085	Lexington, Church of Our Redeemer	396,167	55,406	4,392	51,014	12.9	51,913	-899	3,095
2135	Somerville, St. James's Church	81,133	6,576	0	6,576	8.1	6,378	198	0
2145	Waltham, Christ Church	163,846	19,396	0	19,396	11.8	21,382	-1,986	0
2150	Watertown, Church of the Good Shepherd	118,772	12,410	0	12,410	10.4	7,834	4,576	0
	<b>TOTALS:</b>	<b>3,163,332</b>	<b>412,316</b>	<b>9,805</b>	<b>402,511</b>	<b>12.7</b>	<b>379,803</b>	<b>22,708</b>	<b>5,877</b>

**BOSTON HARBOR**

CODE	M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4035	Boston, Church of St. Augustine & St. Martin	121,136	12,776	0	12,776	10.5	13,333	-556	0
4010	Boston, Church of the Advent	830,326	122,701	0	122,701	14.8	150,330	-27,630	0
4025	Boston, Emmanuel Church	275,080	36,637	0	36,637	13.3	25,201	11,437	0
4070 M	Boston, St. Stephen's Church	54,334	1,615	0	1,615	3.0	299	1,315	-1,301
4075	Boston, Trinity Church	2,678,925	409,233	0	409,233	15.3	406,052	3,182	0
1030	Charlestown, St. John's Church	182,973	22,361	0	22,361	12.2	21,852	509	0
4055	Dorchester, St. Mark's Church	134,070	14,781	0	14,781	11.0	14,199	582	0
4060	Dorchester, St. Mary's Church	95,430	8,792	0	8,792	9.2	9,200	-409	0
3020	Jamaica Plain, St. John's Church	168,848	20,171	0	20,171	11.9	19,839	332	0
4040	Roxbury, St. Cyprian's Church	115,733	32,111	0	32,111	0.0	26,760	5,351	0
4050	Roxbury, St. John St. James Church	115,733	11,939	0	11,939	10.3	13,020	-1,082	0
	<b>TOTALS:</b>	<b>4,656,855</b>	<b>693,116</b>	<b>0</b>	<b>693,116</b>	<b>14.9</b>	<b>700,086</b>	<b>-6,969</b>	<b>-1,301</b>

**CAPE AND ISLANDS**

**M? CHURCH**

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
6005	540,709	77,810	0	77,810	14.4	69,042	8,768	0
6010	121,852	12,887	0	12,887	10.6	13,963	-1,076	0
6015	572,519	82,740	0	82,740	14.5	72,987	9,753	0
6020	268,014	35,542	0	35,542	13.3	37,139	-1,597	0
6030	500,979	71,652	0	71,652	14.3	71,964	-312	0
6040	278,969	37,240	0	37,240	13.3	37,606	-366	5,000
6045	471,889	67,143	0	67,143	14.2	60,708	6,435	0
6050	11,825	0	0	0	0.0	0	0	0
6055	535,630	77,023	0	77,023	14.4	74,799	2,224	0
6060	338,195	46,420	6,700	39,720	11.7	54,263	-14,543	0
6065	325,190	44,404	0	44,404	13.7	43,467	937	5,000
6070	176,347	21,334	0	21,334	12.1	21,789	-455	0
6075	169,142	20,217	0	20,217	12.0	31,405	-11,188	5,857
6095	209,437	26,463	0	26,463	12.6	32,705	-6,243	0
6080	254,491	33,446	0	33,446	13.1	36,690	-3,244	0
6085	199,708	24,955	8,000	16,955	8.5	26,131	-9,176	8,000
6090	24,023	0	0	0	0.0	0	0	0
6025	250,707	32,860	0	32,860	13.1	31,456	1,404	0
<b>TOTALS:</b>	<b>5,249,626</b>	<b>712,136</b>	<b>14,700</b>	<b>697,436</b>	<b>13.3</b>	<b>716,114</b>	<b>-18,678</b>	<b>23,857</b>

**CHARLES RIVER**

**M? CHURCH**

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
3120	0	0	0	0	0.0	16,465	-16,465	0
3030	368,321	51,090	0	51,090	13.9	47,161	3,929	0
3035	281,886	37,692	0	37,692	13.4	40,258	-2,565	0
3045	332,388	45,520	0	45,520	13.7	46,317	-796	0
3125	886,487	131,405	0	131,405	14.8	129,087	2,318	0
3060	278,374	37,148	0	37,148	13.3	36,998	150	0
3105	492,528	70,342	0	70,342	14.3	68,347	1,994	0
3145	281,227	37,590	0	37,590	13.4	35,943	1,647	0
3135	201,034	25,160	0	25,160	12.5	22,246	2,914	0
3140	366,603	50,823	0	50,823	13.9	52,277	-1,453	0
3110	331,732	45,418	0	45,418	13.7	40,948	4,470	0
3130	141,684	15,961	0	15,961	11.3	18,008	-2,047	0
3115	353,029	48,719	0	48,719	13.8	49,650	-930	0
3165	894,446	132,639	0	132,639	14.8	143,696	-11,057	0
<b>TOTALS:</b>	<b>5,209,739</b>	<b>729,510</b>	<b>0</b>	<b>729,510</b>	<b>14.0</b>	<b>747,402</b>	<b>-17,892</b>	<b>0</b>

**CONCORD RIVER**

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
2005 Acton, Church of the Good Shepherd	301,760	40,773	0	40,773	13.5	36,767	4,006	0
2020 Ayer, St. Andrew's Church	149,973	17,246	0	17,246	11.5	15,402	1,844	0
2075 Concord, Trinity Church	648,344	94,493	0	94,493	14.6	91,768	2,725	0
3065 Framingham, St. Andrew's Church	262,469	34,683	0	34,683	13.2	34,859	-177	0
3075 Holliston, St. Michael's Church	151,325	17,455	0	17,455	11.5	17,838	-383	0
3080 Hopkinton, St. Paul's Church	92,412	8,324	1,521	6,803	7.4	12,082	-5,279	6,000
2080 Hudson, St. Luke's Church	57,657	2,937	0	2,937	5.1	4,133	-1,196	0
2090 Lincoln, St. Anne's in-the-Fields Church	559,025	80,649	0	80,649	14.4	83,152	-2,503	0
3100 Natick, St. Paul's Church	447,955	63,433	0	63,433	14.2	59,527	3,906	0
2125 Shirley, Trinity Chapel	72,940	5,306	0	5,306	0.0	0	5,306	0
3155 Southborough, St. Mark's Church	251,828	33,033	0	33,033	13.1	34,463	-1,430	0
2140 Sudbury, St. Elizabeth's Church	461,388	65,515	0	65,515	14.2	51,670	13,845	0
2165 Weston, St. Peter's Church	448,757	63,557	0	63,557	14.2	67,541	-3,984	3,000
<b>TOTALS:</b>	<b>3,905,833</b>	<b>527,404</b>	<b>1,521</b>	<b>525,883</b>	<b>13.5</b>	<b>509,202</b>	<b>16,681</b>	<b>9,000</b>

**MERRIMACK VALLEY**

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1005 Amesbury, St. James's Church	93,869	8,550	0	8,550	9.1	9,839	-1,289	0
1010 Andover, Christ Church	556,265	80,221	0	80,221	14.4	80,955	-734	0
2070 Chelmsford, All Saints' Church	284,375	38,078	0	38,078	13.4	37,949	129	0
1055 Groveland, St. James's Church	125,550	13,460	0	13,460	10.7	14,758	-1,298	0
1065 Haverhill, Trinity Church	179,404	21,808	0	21,808	12.2	18,674	3,133	0
1075 Lawrence, Grace Church	150,991	17,404	0	17,404	11.5	13,857	3,547	0
2095 Lowell, St. Anne's Church	188,218	23,174	5,000	18,174	9.7	25,207	-7,033	5,000
2100 Lowell, St. John's Church	48,443	1,509	0	1,509	3.1	1,794	-285	0
1125 Methuen, St. Andrew's Church	73,266	5,356	0	5,356	7.3	4,420	937	0
1130 Newburyport, St. Paul's Church	305,272	41,317	6,324	34,993	11.5	38,066	-3,073	0
1135 North Andover, St. Paul's Church	175,835	21,254	0	21,254	12.1	23,540	-2,286	0
2040 North Billerica, St. Anne's Church	186,695	22,938	0	22,938	12.3	23,064	-127	0
1195 M West Newbury, All Saints' Church	120,067	8,407	0	8,407	7.0	5,456	2,951	0
2160 Westford, St. Mark's Church	133,347	14,669	0	14,669	11.0	11,040	3,629	0
<b>TOTALS:</b>	<b>2,621,597</b>	<b>318,144</b>	<b>11,324</b>	<b>306,820</b>	<b>11.7</b>	<b>308,618</b>	<b>-1,798</b>	<b>5,000</b>

**MT HOPE BUZZARDS BAY**

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
5030 Fairhaven, Church of the Good Shepherd	32,652	0	0	0	0.0	0	0	0
5035 Fall River, Church of the Holy Spirit	210,952	26,698	0	26,698	12.7	28,376	-1,678	0
5045 Fall River, St. Luke's Church	23,144	0	0	0	0.0	0	0	0
5070 Marion, St. Gabriel's Church	425,133	59,896	0	59,896	14.1	52,242	7,654	0
5080 New Bedford, Grace Church	499,255	71,385	0	71,385	14.3	72,911	-1,526	0
5085 New Bedford, St. Andrew's Church	71,434	5,072	0	5,072	7.1	5,573	-500	0
5090 New Bedford, St. Martin's Church	83,917	7,007	0	7,007	8.4	5,093	1,914	0
5110 Somerset, Church of Our Saviour	133,946	14,762	4,482	10,280	7.7	14,280	-4,000	4,000
5020 South Dartmouth, St. Peter's Church	53,080	2,227	0	2,227	4.2	1,727	501	0
5115 Swansea, Christ Church	152,747	17,676	0	17,676	11.6	16,751	925	0
<b>TOTALS:</b>	<b>1,686,260</b>	<b>204,722</b>	<b>4,482</b>	<b>200,240</b>	<b>11.9</b>	<b>196,952</b>	<b>3,288</b>	<b>4,000</b>

**MYSTIC VALLEY**

M? CHURCH	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
1035 M Chelsea, St. Luke's/San Lucas Church	92,195	5,527	0	5,527	6.0	3,896	1,631	0
1025 M East Boston, Grace Church Federated	0	0	0	0	0.0	0	0	0
1045 Everett, Grace Church	109,251	10,934	0	10,934	10.0	0	10,934	0
1095 Lynnfield, St. Paul's Church	193,923	24,058	4,720	19,338	10.0	19,338	0	0
1105 Malden, St. Paul's Church	123,718	13,176	4,000	9,176	7.4	12,136	-2,960	4,000
2115 Medford, Grace Church	312,075	42,372	0	42,372	13.6	40,534	1,838	0
1120 Melrose, Trinity Parish	209,769	26,514	0	26,514	12.6	26,178	336	0
1145 Reading, Church of the Good Shepherd	168,108	20,057	0	20,057	11.9	19,142	915	0
1170 Saugus, St. John's Church	136,866	15,214	6,000	9,214	6.7	9,159	56	0
1175 Stoneham, All Saints' Church	65,611	4,170	0	4,170	6.4	5,088	-918	0
1190 Wakefield, Emmanuel Church	172,994	20,814	0	20,814	12.0	17,671	3,143	0
2170 Wilmington, St. Elizabeth's Church	43,282	709	0	709	1.6	988	-279	0
2175 Winchester, Parish of the Epiphany	697,799	102,159	0	102,159	14.6	97,887	4,272	0
1200 Winthrop, St. John's Church	136,400	15,142	0	15,142	11.1	12,884	2,258	0
2180 Woburn, Trinity Church	80,750	6,516	0	6,516	8.1	7,405	-889	0
<b>TOTALS:</b>	<b>2,542,741</b>	<b>307,361</b>	<b>14,720</b>	<b>292,641</b>	<b>11.5</b>	<b>272,306</b>	<b>20,335</b>	<b>4,000</b>

**NEPONSET RIVER**

		BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
<b>M? CHURCH</b>									
4085	Canton, Trinity Church	147,781	16,906	0	16,906	11.4	17,638	-732	0
3050	Dedham, Church of the Good Shepherd	88,296	7,686	0	7,686	8.7	9,062	-1,376	0
3055	Dedham, St. Paul's Church	321,864	43,889	0	43,889	13.6	47,287	-3,398	0
4015	Dorchester, Parish of All Saints	368,834	51,169	0	51,169	13.9	53,099	-1,930	0
3005	Hyde Park, Christ Church	60,968	4,464	0	4,464	7.3	0	4,464	0
3015	M Hyde Park, Iglesia de San Juan	0	0	0	0	0.0	0	0	0
4030	Mattapan, Church of the Holy Spirit	229,363	29,551	0	29,551	12.9	32,115	-2,564	0
3085	Medfield, Church of the Advent	210,429	26,616	0	26,616	12.6	24,142	2,474	0
3090	Medway, Christ Church	49,054	1,603	0	1,603	3.3	5,117	-3,514	0
4130	Milton, St. Michael's Church	471,946	67,152	0	67,152	14.2	67,473	-321	0
3150	Norwood, Grace Church	119,586	12,536	0	12,536	10.5	12,492	44	0
5105	Sharon, St. John's Church	49,035	1,600	0	1,600	3.3	1,493	107	0
4160	Stoughton, Trinity Church	62,063	3,620	0	3,620	5.8	5,789	-2,169	0
3160	Walpole, Epiphany Church	209,372	26,453	7,000	19,453	9.3	24,930	-5,477	7,000
3010	West Roxbury, Emmanuel Church	89,403	7,857	0	7,857	8.8	3,439	4,418	0
3170	Westwood, St. John's Church	92,126	8,280	0	8,280	9.0	11,396	-3,116	0
	<b>TOTALS:</b>	<b>2,570,120</b>	<b>309,383</b>	<b>7,000</b>	<b>302,383</b>	<b>11.8</b>	<b>315,472</b>	<b>-13,089</b>	<b>7,000</b>

**NORTH SHORE**

		BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
<b>M? CHURCH</b>									
1015	Beverly Farms, St. John's Church	499,546	71,430	0	71,430	14.3	69,541	1,889	0
1021	Beverly, St. Peter's Church	238,348	30,944	0	30,944	13.0	30,565	379	0
1143	Danvers, All Saints	168,067	20,050	0	20,050	11.9	10,644	9,406	0
1050	Gloucester, St. John's Church	222,672	28,514	0	28,514	12.8	28,013	501	0
1070	Ipswich, Ascension Memorial Church	229,352	29,550	0	29,550	12.9	29,362	187	0
1090	Lynn, St. Stephen's Memorial Episcopal Church	297,508	40,114	0	40,114	13.5	39,096	1,018	0
1116	Marblehead, St. Michael's Church	311,733	42,319	0	42,319	13.6	36,658	5,661	0
1110	Marblehead, Wymann Memorial Church of St. Andrew	296,245	39,918	0	39,918	13.5	36,217	3,701	0
1155	Rockport, St. Mary's Church	156,813	18,306	0	18,306	11.7	18,829	-523	0
1160	Salem, Grace Church	146,985	16,783	0	16,783	11.4	16,010	773	0
1165	Salem, St. Peter's Church	131,500	14,383	0	14,383	10.9	12,427	1,956	0
1060	South Hamilton, Christ Church	416,849	58,612	0	58,612	14.1	50,313	8,299	0
1180	Swampscott, Church of the Holy Name	138,275	15,433	0	15,433	11.2	15,750	-317	0
1185	Topsfield, Trinity Church	244,367	31,877	0	31,877	13.0	35,024	-3,147	0
	<b>TOTALS:</b>	<b>3,498,260</b>	<b>458,230</b>	<b>0</b>	<b>458,230</b>	<b>13.1</b>	<b>428,449</b>	<b>29,782</b>	<b>0</b>

**SOUTH SHORE**

**M? CHURCH**

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	2017 ASSESSMENT (for VOTE)	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
4080 Braintree, Emmanuel Church	14,409	0	0	0	0.0	12,852	-12,852	0
4090 Cohasset, St. Stephen's Church	332,118	45,478	0	45,478	13.7	51,021	-5,543	0
4095 Duxbury, Church of St. John the Evangelist	301,863	40,789	0	40,789	13.5	42,284	-1,495	0
4100 Hanover, St. Andrew's Church	148,837	17,070	5,000	12,070	8.1	19,829	-7,759	5,000
4105 Hingham, Parish of St. John the Evangelist	509,049	72,903	0	72,903	14.3	73,322	-420	0
4110 Holbrook, St. John's Church	83,875	7,001	0	7,001	8.3	6,713	288	0
4120 Marshfield, Trinity Church	167,553	19,971	0	19,971	11.9	21,413	-1,442	0
4125 Milton, Church of Our Saviour	129,391	14,056	0	14,056	10.9	11,804	2,252	0
4135 Quincy, Christ Church	150,331	17,301	5,000	12,301	8.2	17,778	-5,477	0
4140 Quincy, Parish of St. Chrysostom	166,435	19,797	0	19,797	11.9	19,818	-20	0
4145 Randolph, Trinity Church	90,582	8,040	0	8,040	8.9	9,005	-965	1,653
4150 Rockland, Trinity Church	81,275	6,598	0	6,598	8.1	5,048	1,550	0
4155 Scituate, St. Luke's Church	237,054	30,743	0	30,743	13.0	32,002	-1,259	0
4165 South Weymouth, Church of the Holy Nativity	131,473	14,378	0	14,378	10.9	15,381	-1,002	0
5130 Whitman, All Saints' Church	86,818	7,457	0	7,457	8.6	7,528	-72	0
<b>TOTALS:</b>	<b>2,631,063</b>	<b>321,581</b>	<b>10,000</b>	<b>311,581</b>	<b>11.8</b>	<b>345,798</b>	<b>-34,216</b>	<b>6,653</b>

**TAUNTON RIVER**

**M? CHURCH**

	BASE	FORMULA ASSESSMENT	ADJUSTMENT	ASSESSMENT	EFFECTIVE RATE	PRIOR YEAR ASSESSMENT	DIFFERENCE	PRIOR YEAR ADJUSTMENT
5005 Attleborough, All Saints' Church	79,320	6,295	1,448	4,847	6.1	5,559	-712	1,278
5135 Bristol, Trinity Church	94,485	8,645	0	8,645	9.1	19,173	-10,528	10,466
5010 Bridgewater, Trinity Church	93,608	8,509	0	8,509	9.1	8,641	-132	0
5060 Foxborough, St. Mark's Church	156,322	18,230	0	18,230	11.7	20,803	-2,573	6,000
3070 Franklin, St. John's Church	102,267	9,851	0	9,851	9.6	12,277	-2,426	0
5075 Middleborough, Church of Our Saviour	135,883	15,062	0	15,062	11.1	21,548	-6,486	0
5095 North Attleborough, Grace Church	156,322	18,230	0	18,230	11.7	24,449	-6,219	0
5125 Taunton, St. Thomas's Church	329,169	45,021	0	45,021	13.7	30,761	14,260	0
3175 Wrentham, Trinity Church	141,333	15,907	0	15,907	11.3	20,221	-4,314	0
<b>TOTALS:</b>	<b>1,288,709</b>	<b>145,750</b>	<b>1,448</b>	<b>144,302</b>	<b>11.2</b>	<b>163,432</b>	<b>-19,130</b>	<b>17,744</b>
<b>DIOCESAN TOTALS:</b>	<b>39,024,135</b>	<b>5,139,654</b>	<b>75,000</b>	<b>5,064,654</b>	<b>13.0</b>	<b>5,083,633</b>	<b>-18,980</b>	<b>81,830</b>

## Projected Revenue for 2017

### Assessments and Adjustments and Reserves

The 2017 assessment formula, approved by Diocesan Council, remains unchanged from 2010:

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

*where the BASE for 2017 is equal to line 14 (“all other operating expenses”) from the 2014 parochial report, less line 7 (“assistance from diocese”).*

For a mission, the 2017 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 2014 generates a gross assessment for 2017 of \$5,139,654. Again this year Diocesan Council created an Assessment Coordinating Committee, whose adjustments to the assessments of 16 congregations totaled \$75,000, as follows:

- Church of Our Saviour, Arlington: \$2,172
- St. John’s Church, Arlington: \$3,241\*
- All Saints’ Church, Attleboro: \$1,448\*\*
- St. Andrew’s Church, Hanover: \$5,000\*
- St. Paul’s Church, Hopkinton: \$1,521\*\*
- Church of Our Redeemer, Lexington: \$4,392\*
- St. Anne’s Church, Lowell: \$5,000\*\*
- St. Paul’s Church, Lynnfield: \$4,720
- St. Paul’s Church, Malden: \$4,000\*\*
- St. Paul’s Church, Newburyport: \$6,324
- St. Peter’s Church, Osterville: \$6,700
- Christ Church, Quincy: \$5,000
- St. John’s Church, Saugus: \$6,000
- Church of Our Saviour, Somerset: \$4,482\*
- Church of the Epiphany, Walpole: \$7,000\*
- Church of the Good Shepherd, Wareham: \$8,000\*

*\* indicates second year / \*\* indicates third year*

The total value of assessments to be billed in 2017 is \$5,064,654, and our reserve for uncollected assessments is \$20,000. In addition to the assessments, revenue also reflects \$50,000 in projected voluntary contributions from two congregations not subject to the assessment and an estimated \$8,000 in collections at the bishops’ visitations.

### Net Revenue from Investments

Core budget revenue amounting to 26.8% 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 25% of the available spending policy income. The remaining funds have some restriction on the use of the spending policy income, but in most cases the restriction is consistent with the regularly anticipated expenses of the diocese. There are a few funds, however, where the restrictions call for close monitoring and measurement.



### Spending Policy – Trusts

The appendix table on page 54 lists the trusts owned and managed by the Trustees of Donations (TOD) for the benefit of the diocese. In 2017 the TOD will distribute 4% of a base amount defined as the average of the market value of each fund measured at the end of each calendar quarter from September 2013 through June 2016.

There are a few funds with restrictions that require the TOD to deviate from the general spending policy formula. In some cases, the distribution is limited to actual income produced by the fund, and in other cases, all income must be reinvested for the time being. The table of projected trust income for these funds is an estimate of the income that will be available in 2017.

The total spending policy income available in 2017 (\$867,489) is a small increase from 2016 (\$818,465), due to market appreciation.

### Spending Policy – Endowments (Agency Funds)

The appendix table on page 53 lists the endowments owned by the diocese and managed primarily by the TOD. These include some funds that are unrestricted and others that have a restriction on their use as stipulated by a third party donor at the time the fund was created or stipulated by Diocesan Council. Pages 48-52 offer more historical detail about these funds.

The proposed spending policy for 2017 is similar to that used by the TOD: to draw 4% of a base that reflects the average of the market value over the past 12 quarters, adjusted for withdrawals from and additions to principal.

The total spending policy income available to the 2017 core budget is \$1,033,809, which is \$29,991 more than in 2016. The increase reflects net additions to the endowment during 2016 as well as market appreciation.

### Spending Policy and Core Revenue

Over the summer of 2015, the Financial Advisory Committee affirmed its support of a 4% spending draw from diocesan endowment funds to support the core budget. The value of each fund for the purpose of calculating the draw is based on a trailing 12-quarter average of end-of-month market value, adjusted for additions and withdrawals. This policy will continue in 2017.

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

It is possible that some future supplemental draw on the endowment could be needed if actual diocesan operations run at a significant deficit. Ideally, setting sufficient levels of reserves for adverse outcomes and maintaining strong financial controls throughout the year will prevent this type of supplemental draw. To that end, Council formally established and seeded three reserves (see page 49), one for future episcopal elections (cost center 4023), one for major purchases (cost center 5142) and one for capital improvements (cost center 5141). These are in addition to the longtime reserve for General Convention expenses (cost center 4411). The 2017 core budget provides continued funding for each of these four reserves.

### Dividend and Interest Income

The estimate for 2017 dividend income is \$78,000. Of this, \$42,400 is from a gift of stock received more than 40 years ago, with the request that it not be sold. The other sources of income recorded here are three trusts not held by the Trustees of Donations, an illiquid investment from a closed parish and dividend income on diocesan cash and bond mutual funds. The interest income, estimated at \$8,000, is primarily from clergy loans.

The diocesan portfolio also includes loans to congregations (separate from those made through the Stokes Fund loan program). The current status of the parish loans discussed in last year's budget book is:

- St. Elizabeth's Church, Wilmington (outstanding amount: \$4,803): The congregation is behind several years in payments and has agreed to a new repayment plan.
- Grace Church, North Attleborough (outstanding amount: \$57,091): The congregation entered into an agreement with Diocesan Council in 2012 which involves certain financial and operational incentives in order for the parish to achieve certain milestones. In 2014 the longtime rector retired, and the parish requested a reduction in its payment plan during the interim. Council agreed to do so for 2014 and 2015. Under the revised plan, Grace Church made payments of \$120,271 and earned debt forgiveness of \$43,138 in 2014. Council will be presented a revised plan from the congregation to continue its debt reduction.

### Supplemental Budget Revenue

The supplemental budget table shows eight sources of revenue:

**1. Grants from Bishop's Directed Funds (BDF's, formerly known as Bishop's Discretionary Funds), restricted and unrestricted:** These are trust funds held by the Trustees of Donations where the bishop and the diocese are named as income beneficiaries; some are restricted in use and some are not. Of the many funds owned by the Trustees of Donations, 34 funds (listed on page 55) with a market value of about \$18.1 million are for the benefit of the diocesan bishop, and the Trustees of Donations provide him with an annual spending policy from these trusts. The generosity of past donors and the diocesan bishop makes it possible to fund new ventures in mission and strategic ministries through the supplemental budget.

In 2017, Bishop Gates will continue the practice of using the bulk of the BDF income to support pilot programs and new initiatives, to fund the Office of Development and to supplement strategic ministries. The 2017 draw is set at \$694,445. If the Annual Fund comes in above \$328,781, then the grants from the BDF's will be reduced.

**2. The Annual Fund:** The 2017 Annual Fund goal is set at \$328,781 to cover various strategic ministries. With \$30,000 needed to cover the direct costs of the Annual Fund, \$298,781 is likely to be available for Annual Fund grants in 2017.

**3. Contributions:** Fundraising by the Chinese Ministry, Life Together and Jubilee Global Ministries. In 2017 the budget amounts to \$146,784.

**4. Grants:** These total \$106,333. The largest grant recorded here is \$95,000, a continuation of the grant from Episcopal City Mission to the Life Together program. Projected grants from external foundations total \$11,333.

**5. Proceeds from closed parishes:** The Closed Parish Net Proceeds Fund will be re-funded by the closing and sale of the Church of the Holy Spirit in Wayland. A final accounting will be completed once the rectory is sold and costs related to the closing are determined. See pages 41-43 for more information.

**6. In-kind:** This line reflects Life Together's use of the diocesan property at 40 Prescott Street, Brookline for offices and fellow housing, valued at \$65,000 (see page 28).

**7. Transfers:** Funds transferred between core and supplemental budgets and other sources. The largest transfer is the \$200,000 internal grant from the General Endowment Fund to the Together Now campaign.

**8. Fee Revenue:** Received for Life Together site placements, consulting and rental fees, and for Chinese Ministry programs.

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

The structure for diocesan operations is designed to encourage accountability, clarity and collaboration with five functional areas and diocesan leadership. The bishop, bishop suffragan and the canon to the ordinary are responsible for the management of diocesan operations and the controls on the operations that are implemented through the five functional areas. The treasurer ensures that financial records are reflective of the full resources applied to each individual component of mission strategy fulfillment. In 2016 the staff's reporting matrix and budget allocations were changed to better reflect the operational process of the diocese.

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

The **Congregational Resources and Training** area includes grant programs, events, training and communications.

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

The **Episcopal and Diocesan Support** area contains the governance, canonical, ecumenical and development functions. The Office of Development helped to raise \$20 million for the Together Now campaign. (See page 44 for more campaign information.) The two bishops assisted by the canon to the ordinary have oversight responsibilities for all diocesan operations, in conjunction with staff who have specific functional responsibilities.

In the **Administrative Services** area, the Treasurer's Office oversees financial services, human resources and information technology.

## Projected Expenses for 2017 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: 2017 proposed budget with the 2016 budget (top) and the 2015 actuals (bottom) for comparison. Each row represents a specific cost center code and description within the area. The first row in each area is staff compensation. There are five columns of figures that include a variety of budgeted and actual expenses and revenue offsets:

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

**Compensation and Benefits:** All compensation and benefit-related expenses, including 1099 payments to independent contractors. Salary and benefits for diocesan staff reflect a 2% increase and an estimated 8% increase in the cost of health care coverage for 2017.

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

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

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

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

The total 2017 budget for this area is \$918,094, with \$824,843 in the core budget and \$93,251 in the supplemental budget. The 2016 core and supplemental budget total was \$1,089,128. Specific amounts in this area have been reallocated at the request of staff who oversee the budget.

• Deaneries, Congregations and Clergy: 1000 - Core

This line contains the total compensation costs for seven of eight staff members listed on page 59. Two are part time. The mission hubs program director is paid from Together Now campaign funds.

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

An amount of \$400 per deanery to support deanery assembly activities; \$4,000 per deanery to offset deans' time and expense; and \$12,000 to provide hospitality for Confirmations.

• Congregations: 1101 - Core & Supplemental

The \$12,000 in the core budget funds the priests-in-charge consultants program. In the supplemental budget there is a total of \$20,000 for mentoring of newly ordained clergy from the Bishop's Directed Funds.

• Transition Ministries: 1111 - Core

Level funded at \$10,000, for supporting expenses for the Office of Transition Ministries.

• Clergy: 1201 - Core

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

• Sabbaticals: 1211 - Core & Supplemental

The funds totaling \$26,555 for clergy sabbaticals come from two sources: an agency endowment fund in honor of Bishop Norman Nash (\$9,055) and a Bishop's Directed Funds grant (\$17,500).

• Continuing Education: 1212 - Supplemental

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

• MSASA EDS: 1213 - Core

Spending policy income of \$11,418 is available for a scholarship program for students from Africa attending Episcopal Divinity School.

• Clergy Dependent Scholarships: 1221 - Supplemental

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

• Dill Campership: 1223 - Supplemental

The spending policy income of \$3,359 is from a restricted bishop's directed fund to support a scholarship to Camp O-At-Ka in Maine.

• Support for Retired Clergy: 1231 - Core & Supplemental

The Society for the Relief of Aged or Disabled Episcopal Clergy and the Society for the Relief of Widows, Widowers and Orphans of Clergy of the Episcopal Church both receive distributions from agency funds as well as from trust funds where the organizations are named as income beneficiaries. These distributions help retired clergy and widows, widowers and orphans of clergy. The books and records of these two organizations, because they are separate 501(c)(3)

organizations, are not part of the diocesan budget. Because retired clergy and their families are living longer, the funds from the agency and trust funds need funding support. The 2017 budget allocates \$37,000, \$5,300 for program and support expenses, including gatherings, and \$31,700 for additional grants. The BDF provides \$5,500 of this funding.

- Commission on Ministry: 1311 - Core

The net cost for this program is budgeted at \$68,012, including \$10,000 for the Commission on Ministry's priority to fund seminarians whose first language is not English. The credit of \$7,000 is for fees paid by those in the ordination process, such as those for the Oxford Document background checks.

- Seminarians: 1312 - Core & Supplemental

Scholarships for seminarians in the ordination process. The amount of \$63,363 is the spending policy income from an agency endowment fund for this purpose.

- Fresh Start/New Call: 1321 - Core

A total of \$16,666—\$8,333 to be matched by a grant from the Lilly Endowments Pastoral Excellence Network—for curriculum revision and leader training. This is the second year of a three-year matching grant.

- Diaconate Program: 1331 - Core

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

- Clergy Family Network: 1341 - Core

An amount of \$1,000, based on 2016 actuals.

- Pre-Lenten Retreat: 1411 - Core

Net costs to the core budget, after fees are budgeted at \$3,000, based on 2016 actuals.

- Clergy Conference: 1421 - Core

This three-day event is budgeted at \$105,000, of which \$60,000 is covered by attendee fees. The balance, \$45,000, is covered by the core budget.

- Clergy Day: 1431 - Core

Clergy Day is budgeted at \$3,000, of which \$2,000 is covered by fees, leaving a core budget balance of \$1,000.

Deaneries, Congregations & Clergy Core									
2017 Budget 2016 Budget and 2015 Actual									
2017 Budget									
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Transfers	Total	2016 Budget	
CC1000 DC & C	-	477,362	-	-	-	-	477,362	650,639	
CC1001 Deaneries	-	-	4,800	-	-	-	4,800	4,800	
CC1002 Deans	48,000	-	-	-	-	-	48,000	48,000	
CC1003 Deanery Confirmations	12,000	-	-	-	-	-	12,000	12,000	
CC1101 Congregations	4,000	8,000	-	-	-	-	12,000	12,000	
CC1111 Transition Ministries	-	-	10,000	-	-	-	10,000	10,000	
CC1201 Clergy	-	-	-	2,000	(2,000)	-	-	-	
CC1211 Sabbaticals	-	-	-	-	-	9,055	9,055	8,821	
CC1213 MSASA EDS	11,418	-	-	-	-	-	11,418	11,118	
CC1231 Support for Retired Clergy	37,000	-	-	-	-	(5,500)	31,500	31,500	
CC1311 Commission on Ministry	36,000	21,012	18,000	-	(7,000)	-	68,012	68,012	
CC1312 Seminars	63,363	-	-	-	-	-	63,363	61,983	
CC1321 Fresh Start / New Call	-	-	16,666	-	-	(8,333)	8,333	8,333	
CC1331 Diaconate Program	-	9,000	10,000	3,000	(2,000)	-	20,000	20,000	
CC1341 Clergy Family Network	1,000	-	-	-	-	(1,000)	-	-	
CC1411 Pre Lenten Retreat	-	-	4,600	1,800	(3,400)	-	3,000	3,000	
CC1421 Clergy Conference	-	2,000	103,000	-	(60,000)	-	45,000	45,000	
CC1431 Clergy Day	3,000	-	-	-	(2,000)	-	1,000	1,000	
<b>Totals</b>	<b>215,781</b>	<b>517,374</b>	<b>167,066</b>	<b>6,800</b>	<b>(76,400)</b>	<b>(5,778)</b>	<b>824,843</b>	<b>996,206</b>	
2015 Actual									
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Transfers	Total		
CC1000 DC & C	-	564,550	-	-	-	-	564,550		
CC1001 Deaneries	-	-	4,049	-	-	-	4,049		
CC1002 Deans	48,000	-	267	-	-	-	48,267		
CC1003 Deanery Confirmations	750	1,800	12,436	-	-	-	14,986		
CC1101 Congregations	15,354	2,000	3,043	-	(314)	-	20,083		
CC1111 Transition Ministries	-	990	10,138	-	(3,900)	-	7,228		
CC1201 Clergy	-	-	-	3,695	(330)	-	3,365		
CC1211 Sabbaticals	15,797	-	572	-	-	8,203	24,572		
CC1212 Continuing Education	5,146	-	-	-	-	-	5,146		
CC1221 Clergy Dependent Scholarships	37,500	-	-	-	(100)	-	37,400		
CC1231 Support for Retired Clergy	-	-	11,796	-	-	(5,300)	6,496		
CC1311 Commission on Ministry	23,763	28,806	25,314	3,480	(11,205)	-	70,158		
CC1312 Seminars	64,112	-	-	-	(11,398)	(7,612)	45,102		
CC1321 Fresh Start Program	950	375	4,157	-	(25,000)	-	(19,518)		
CC1331 Diaconate Program	278	10,288	27,075	-	(530)	-	37,111		
CC1341 Clergy Family Network	1,812	-	-	195	-	(1,000)	1,007		
CC1411 Pre Lenten Retreat	15	2,000	6,585	73	(4,900)	-	3,773		
CC1421 Clergy Conference	-	2,900	120,810	701	(68,525)	-	55,886		
CC1431 Clergy Day	-	-	3,571	86	(3,510)	-	147		
<b>Totals</b>	<b>213,477</b>	<b>613,709</b>	<b>229,813</b>	<b>8,230</b>	<b>(129,712)</b>	<b>(5,709)</b>	<b>929,808</b>		

**Deaneries, Congregations & Clergy - Supplemental  
2017 Budget, 2016 Budget and 2015 Actual**

		2017 Budget				2016 Budget	
	Program Expenses	Revenue Offset	Transfers	Grant	BDF Grants	Net Cost	2016 Budget
CC1101 Congregations - Making Excellent Disciples	20,000	-	-	-	(20,000)	-	20,000
CC1211 Sabbaticals	26,555	-	(9,055)	-	(17,500)	-	26,321
CC1212 Continuing Education	10,000	-	-	-	(10,000)	-	10,000
CC1221 Clergy Dependent Scholarships	33,337	-	-	-	(33,337)	-	33,337
CC1223 Dill Campership	3,359	-	-	-	(3,359)	-	3,264
CC1231 Support for Retired Clergy	-	-	5,500	-	(5,500)	-	-
CC1321 Fresh Start/New Call	-	-	(8,333)	8,333	-	-	-
CC1341 Clergy Family Network	-	-	1,000	-	(1,000)	-	-
<b>Totals</b>	<b>93,251</b>	<b>-</b>	<b>(10,888)</b>	<b>8,333</b>	<b>(90,696)</b>	<b>-</b>	<b>92,922</b>
		2015 Actual					
	Program Expenses	Revenue Offset	Transfers	Lilly Grant	BDF Grants	Net Cost	
CC1101 Congregations - Making Excellent Disciples	25,000	-	-	(25,000)	-	-	
CC1211 Sabbaticals	24,572	-	(8,203)	-	(17,500)	(1,131)	
CC1212 Continuing Education	5,146	-	-	-	(10,000)	(4,854)	
CC1221 Clergy Dependent Scholarships	34,484	-	-	-	(34,244)	240	
CC1223 Dill Campership	3,016	(3,016)	-	-	-	-	
CC1231 Support for Retired Clergy	-	-	5,300	-	-	5,300	
CC1311 Commission on Ministry	-	-	-	-	(10,020)	(10,020)	
CC1312 Seminars	-	-	7,612	-	-	7,612	
CC1341 Clergy Family Network	-	-	1,000	-	-	1,000	
CC1421 Clergy Conference	-	-	-	-	-	-	
<b>Totals</b>	<b>92,218</b>	<b>(3,016)</b>	<b>5,709</b>	<b>(25,000)</b>	<b>(71,764)</b>	<b>(1,853)</b>	



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

The total 2017 budget for this area is \$1,243,029, with \$1,203,029 in the core budget and \$40,000 in the supplemental budget. This area was budgeted \$1,245,089 in 2016.

• Congregational Resources and Training: 2000 - Core

The total compensation and benefits costs for staff members in this area are \$493,014 (see roster on pages 59-60). Between the Together Now campaign and the Congregational Resources and Training core budget, approximately \$880,000 per year is granted to congregations and clergy. (See page 56.)

• Coburn Fund: 2001 - Core

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

• Congregational Development Grants: 2011, 2012 - Core

The two congregational development grant programs have been level funded: \$60,000 for the targeted grants and \$150,000 for the open grants.

• Bristol County Case Grants: 2013 - Core

The draw for this grant program is \$135,162. The intended uses of the fund's income when it was established as part of the diocesan endowment include service to Bristol County residents in need, as well as the general and religious purposes of the diocese.

• Congregational Program Grants: 2014 - Core & Supplemental

This cost center contains specific grants to congregations funded by agency or trust endowments or supplemental sources. In the core budget, agency endowments support grants to St. John's, Sharon (\$21,742), Christ Church, Plymouth (\$3,213) and Emmanuel Church, West Roxbury (\$3,972). A trust fund provides a grant to Emmanuel Church, Boston (\$7,647). In the supplemental budget, \$10,000 is allotted to St. Stephen's Church, Lynn for its KIDS in Community summer program and \$25,000 to Grace Church, Everett.

• Deaf Ministry Grants: 2015 - Core

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

• Sending Serving and House of Mercy Grants: 2021, 2022 - 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, which require a match from grant recipients and are open to any outreach activity, and \$2,733 for House of Mercy grants, which require a focus on women and children in need (no match necessary). The funding sources for the House of Mercy grants are agency endowment 7002W and trust endowment 7001W.

• Hispanic Ministries: 2031 - Core

The 2017 budget for this grant program to support Hispanic ministries in congregations is \$25,000. An additional \$12,279 pays for the Hispanic missionary.

- Green Grants and Loans: 2052 – Together Now Campaign

The 2016 green grants and loan programs have been funded through the Together Now campaign (see page 44). The year 2016 is the final year of grant funding provided by the campaign. The Green Loan fund, along with the Stokes Fund loans, are available for environmentally responsible improvements to church buildings.

- Spring Learning Event: 2112 - Core

The core budget for 2017 is \$5,000, with \$1,500 in participant fees, for a net expense of \$3,500.

- Resource Day: 2113 - Core

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

- CRT Workshops: 2131 - Core

The total cost of \$9,000 for the various workshops offered throughout the diocese, \$2,000 of which is offset by fees collected.

- Antiracism: 2132 - Core

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

- Safe Church: 2133 - Core

A net of \$4,000 for trainings, online and in person—\$7,000 in total cost, \$3,000 is offset by fees.

- Resource Center: 2151 - Core

The amount of \$500 stocks and renews the materials in the Resource Center staffed by the missionary for Christian education, formation and discipleship.

- Consultants and Coaches: 2161 - Core

The amount of \$18,000 for congregational consultants and coaches and their compensation (\$8,000) and expenses (\$10,000). Congregational Consultants help with best practices in many areas, including finances, buildings, leadership and stewardship.

- Congregational Support: 2211 - Core

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

- Program Support: 2221 - Core

The amount of \$36,300 covers various workshop and training programs as well as a grant of \$30,000 to the Leadership Development Initiative, of which \$5,000 is funded from the BDF. An amount of \$2,000 is collected in fees.

- Family Camp: 2222 - Core

Family Camp is essentially a break-even operation.

- Committee Support: 2231 - Core

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

- Communications: 2311, 2312 - Core

The total budget is level funded at \$52,000.

Congregational Resources & Training - Core						
2017 Budget, 2016 Budget and 2015 Actual						
2017 Budget						
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Revenue Offset	Total
2017 and 2016 Budget						2016 Budget
CC2000 CR & T	-	493,014	-	-	-	493,014
CC2001 Coburn Fund	54,889	-	-	-	-	54,889
CC2011 Cong Dev Open Grants	150,000	-	-	-	-	150,000
CC2012 Cong Dev Targeted Grants	60,000	-	-	-	-	60,000
CC2013 Bristol County Case Fund Grants	135,162	-	-	-	-	135,162
CC2014 Congregational Program Grants	36,574	-	-	-	-	36,574
CC2015 Deaf Ministry Grants	8,000	-	-	-	-	8,000
CC2021 Sending Serving Grants	48,000	-	-	-	-	48,000
CC2022 House of Mercy Grants	31,703	-	-	-	-	31,703
CC2031 Hispanic Ministries	25,000	12,279	-	-	-	37,279
CC2112 Spring Learning Event	4,000	-	1,000	-	(1,500)	3,500
CC2113 Resource Day	9,000	1,000	1,500	-	(4,000)	7,500
CC2131 CRT Workshops	6,500	-	2,500	-	(2,000)	7,000
CC2132 Anti-Racism	3,000	-	-	-	(700)	2,300
CC2133 Safe Church	7,000	-	-	-	(3,000)	4,000
CC2151 Resource Center	500	-	-	-	-	500
CC2161 Congregational Consultants	-	8,000	10,000	-	-	18,000
CC2211 Congregation Support	-	-	-	9,000	-	9,000
CC2221 Program Support	36,300	-	-	-	(2,000)	34,300
CC2222 Family Camp	308	-	-	-	-	308
CC2231 Committee Support	-	-	10,000	-	-	10,000
CC2311 Diocesan Communications	-	-	50,000	-	-	50,000
CC2312 FYI Newsletter	-	-	2,000	-	-	2,000
<b>Totals</b>	<b>615,936</b>	<b>514,293</b>	<b>77,000</b>	<b>9,000</b>	<b>(13,200)</b>	<b>1,203,029</b>
<b>2015 Actual</b>						
CC2000 CR & T	-	463,021	-	-	-	463,021
CC2011 Cong Dev Open Grants	129,430	-	-	-	-	129,430
CC2012 Cong Dev Targeted Grants	53,808	-	-	-	-	53,808
CC2013 Bristol County Case Fund Grants	113,800	-	-	-	-	113,800
CC2014 Congregational Program Grants	50,577	-	-	-	-	50,577
CC2015 Deaf Ministry Grants	8,865	-	-	-	-	8,865
CC2021 Sending Serving Grants	43,385	-	-	-	-	43,385
CC2022 House of Mercy Grants	29,973	-	-	-	-	29,973
CC2031 Hispanic Ministries	25,000	10,248	-	-	-	35,248
CC2112 Spring Learning Event	1,884	1,970	1,122	34	(1,457)	3,553
CC2113 Resource Day	951	-	14,157	79	(4,540)	10,647
CC2131 CRT Workshops	1,417	-	1,532	38	(1,960)	1,027
CC2132 Anti-Racism	90	-	5,508	10	(3,100)	2,508
CC2133 Safe Church	-	6,559	2,545	56	(4,680)	4,480
CC2151 Resource Center	418	-	197	-	(40)	575
CC2161 Congregational Consultants	350	10,490	6,452	505	(515)	17,282
CC2200 CRT Support	-	-	1,794	-	-	1,794
CC2211 Congregation Support	6,375	500	7,545	624	(20,000)	(4,956)
CC2221 Program Support	28,949	1,895	1,881	47	(2,305)	30,467
CC2231 Committee Support	-	-	3,981	-	(471)	3,510
CC2311 Diocesan Communications	6,168	1,675	27,989	10	-	35,842
CC2312 FYI Newsletter	-	-	2,688	-	-	2,688
<b>Totals</b>	<b>501,440</b>	<b>496,358</b>	<b>77,391</b>	<b>1,403</b>	<b>(39,068)</b>	<b>1,037,524</b>



Strategic Ministries (see tables on pages 32 and 33)

The total 2017 budget for this area is \$2,751,876, with \$1,275,792 in the core budget and \$1,476,084 in the supplemental budget. The 2016 core and supplemental budget total was \$2,794,382.

• Strategic Ministries: 3000

Compensation in this area is allocated to the specific cost centers. The half-time project director of global mission is funded from the Together Now campaign mission tithe (two-thirds) and Jubilee Ministry (one-third), cost center 3511.

• Youth Ministry: 3011, 3012 - Core

The core budget for the diocesan youth ministry includes the compensation and benefits for the director of youth ministry and a part-time administrator along with \$80,000 for program and operational services. Fees collected are \$35,000. The Youth Leadership Academy is budgeted at \$53,000; \$40,000 is collected in fees.

• Life Together: 3056 - Core & Supplemental

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

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

Eighty percent of alumni serve in some capacity in their churches and communities. Thirty percent of Life Together fellows continue on to ordination in the Episcopal Church and other Christian denominations. Ten alumni are currently discerning ordination in the Diocese of Massachusetts.

In the 2016-2017 program year, Life Together will host 26 young adults in five intentional communities across eastern Massachusetts:

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

**Funding:** Over the past five years, Life Together has built strong partnerships to secure substantial outside funding, resulting in a diverse and balanced funding structure. Including in-kind estimates, the total budget for the coming year is \$709,000. The plan for securing the needed revenue is:

- Site fees of \$256,000 (an average of \$11,682 per intern)
- External grants totaling \$95,000

- Annual fundraising campaign and event led by staff and fellows to net \$65,000
- Consulting fees totaling \$5,000
- Core budget contribution of \$75,000
- Supplemental budget contribution of \$148,000
- In-kind housing worth \$65,000 for office space and intentional community housing.

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

#### Housing:

Five deaneries across the diocese host intentional communities of Life Together fellows. In the 2016-2017 program year, two intentional communities will continue to be housed in diocesan properties (40 Prescott Street in Brookline and 7 St. Luke's Road in Allston). Since this is a year-to-year arrangement and since the total number of interns can change, for the purpose of understanding the cost model of the program, this budget includes the in-kind value of housing provided this year by diocesan property.

Life Together is continuing a partnership with the Episcopal Chaplaincy at Harvard University where seven first-year Micah Fellows will live this fall. Additionally, Life Together Emmaus Fellows live at the St. Luke's Road property in Allston.

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

- MIT Campus Ministry: 3111 - Core & Supplemental

The MIT campus ministry cost center budget provides for salary, expenses and benefits for a full-time chaplain (\$124,227) plus program expenses of \$7,000. The ministry may raise additional funds through the MIT development office. In addition to two agency endowment funds that support campus ministry in general, an additional agency fund and a bishop's directed fund provide support for the MIT ministry.

- Boston University Campus Ministry: 3121 - Core

The Boston University campus ministry cost center budget provides for salary, expenses and benefits for a half-time chaplain (\$49,278) plus program expenses of \$7,000.

- Boston College-Northeastern University Campus Ministries: 3131, 3136, 3141 - Core

One chaplain splits her time between the Boston College and Northeastern campuses, and the shared cost center 3136 provides for the salary, expenses and benefits (\$115,058). Each of these campus ministry programs is allotted \$7,250 for program support.

- Tufts University Ministry: 3171 - Core

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

- Grace Chapel, Brockton: 3221 – Supplemental

A congregation, Grace Chapel, worships and has office space in the First Lutheran Church in Brockton. Proceeds from the sale of the former St. Paul's Church and condo in Brockton are used, by vote of Diocesan Council, to pay the full-time compensation for Grace Chapel's priest and two part-time lay employee salaries (\$114,006). Bishop Gates, staff and Diocesan Council continue to discern what shape the ministry in Brockton is taking.

- Continuing Grants for Congregations: 3231, 3241, 3251 - Core  
Level funding is provided in the 2017 budget for grants directly to congregations to help pay their clergy, as follows: St. Luke's-San Lucas, Chelsea, \$66,000; and Christ Church/Iglesia de San Juan, Hyde Park, \$44,000; and for the compensation and benefits paid directly to the vicar at St. Stephen's Church, Boston (\$138,898).

- Cantonese Congregations: 3311, 3321 - Core & Supplemental  
The core budget provides the full compensation and benefits for the canon for Asiamerican ministries in cost center 3311 (\$93,328). The two Cantonese congregations raise additional funds for their ministries through contributions and grants (projected at \$60,000). These revenues and the activities funded through them are reflected in the supplemental budget lines for these two cost centers.

- St. Mary's, Dorchester: 3331 - Supplemental  
The amount of \$50,000 to support part of a full-time clergy salary from the Bishop's Directed Funds.

- San Pedro/St. Peter's, Salem: 3341 - Core  
The \$65,000 grant in the 2017 core budget will help the San Pedro/St. Peter's congregation, both Hispanic and Anglo, to follow its strategic plan that would have it increasingly viable over the next five years.

- Grace Church, Lawrence: 3351 - Core  
The \$60,000 grant in the 2017 core budget supports part of the salary of a Hispanic priest who ministers to all members of the congregation. Grace has been asked to develop a strategic plan.

- Church of the Good Shepherd, Watertown: 3361 - Supplemental  
With funds from proceeds from the sale of closed churches, the Church of the Good Shepherd has developed a long-range plan and a model for church restarts. Funding from closed church proceeds is no longer available, so a grant of \$30,000 to support part of a clergy salary is funded in the supplemental budget by the Bishop's Directed Funds, which is \$15,000 less than in 2016.

- Dartmouth, St. Peter's—The Bridge: 3371 - Supplemental  
Support for a new initiative of St. Peter's Church in Dartmouth to provide mental health outpatient support services to the greater New Bedford area. The Bridge is housed at St. Peter's, staffed by professionals, serving a vital need in the community, and funded through diocesan support and independent fundraising. The \$45,000 here is for additional start-up costs to be repaid over time to the Bishop's Directed Funds. In addition, the Bishop's Directed Funds will lend St. Peter's up to \$30,000 from a fund dedicated to making loans to parishes. The business plan indicates self-sufficiency, with the ability to make payments on the loan by year three.

- Urban Residents: 3411 - Core & Supplemental  
The Urban Residents program places newly ordained clergy in urban parishes for three-year terms, with experienced mentors who help to train the next generation of skilled urban clergy. In 2017 the core budget will fund one full-time resident. A quarter-time resident will be funded through the supplemental budget from Annual Fund contributions.



- African Ministries: 3431 - Core

The budget for grants to African congregations is level funded at \$25,000 in 2017.

- Jubilee Ministry: 3511 - Core & Supplemental

The core budget shows funding for the Jubilee Ministry, set at \$45,000. In addition, there is approximately \$63,000 available from prior years' fundraising, of which \$30,784 is budgeted for 2017. An additional \$3,575 for Jubilee Ministry is funded through the BDF. Jubilee oversees global mission partnerships.

- Middle East Network Committee: 3531 - Core

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

- B-SAFE: 3541 - Supplemental

The B-SAFE program is an important outreach and partnership opportunity for more than 50 participating congregations, including five host churches and the Epiphany School. As a separate 501(c)(3), B-SAFE has its own set of financial controls and development efforts. For 2017 the program is budgeted a diocesan contribution of \$250,000 from the supplemental budget, of which \$125,000 will be funded through the Annual Fund and \$125,000 funded through grants from the Bishop's Directed Funds.

- B-PEACE for Jorge: 3545 – Supplemental

Established by Diocesan Convention in 2012 in response to the murder of Jorge Fuentes and other acts of violence across the nation, the Jorge Fuentes Antiviolence Task Force and its B-PEACE for Jorge campaign is funded at \$50,000 from the Annual Fund and other contributions. The campaign has narrowed its focus to youth jobs and gun law reform. Volunteers from across the diocese, as well as interfaith and civic partners, are committed to the campaign's projects to help end violence.

- Mission Through Partnerships: 3551 – Core

An amount of \$6,000 to support the travel costs of the deacon for mission.

- The Cathedral: The Crossing; and Cathedral Ministry with the Homeless: 3911 - Supplemental  
A \$77,000 grant is budgeted from the supplemental budget to support the work of The Crossing, the emergent church congregation at the Cathedral Church of St. Paul, and to support work with MANNA and the homeless by the cathedral's associate minister. It is the responsibility of the Cathedral Chapter to decide how the grant is distributed.

- Barbara C. Harris Center: 3921 – Core

A \$1,956 grant will be given out of an agency endowment fund.

- Episcopal City Mission: 3931 - Core

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

- United Thank Offering: 3952 - Core

This \$1,748 supports the Native American Lillian Vallely School in Idaho.



Strategic Ministries - Core									
2017 Budget, 2016 Budget and 2015 Actual									
2017 Budget	Program Expenses	Compensation & Benefits	2017 Budget			Revenue Offset	Transfers	Total	2016 Budget
			Operational & Support Svcs	Mgt and Prof Svcs					
CC3011 Youth Ministry	62,500	162,662	17,500	-	(35,000)	-	207,662	179,819	
CC3012 Youth Leadership Academy	41,000	6,000	6,000	-	(40,000)	-	13,000	13,000	
CC3056 Life Together	-	-	-	-	-	75,000	75,000	75,000	
CC3111 MIT Ministry	7,000	124,227	-	-	-	(3,363)	127,864	125,979	
CC3121 Boston University	7,000	49,278	-	-	-	-	56,278	64,138	
CC3136 BC/NU Combined	7,250	-	-	-	-	(250)	7,000	7,000	
CC3141 Northeastern	7,250	115,058	-	-	-	(250)	115,058	113,157	
CC3171 Tufts University Ministry	14,000	-	-	-	-	-	7,000	7,000	
CC3231 Chelsea, St. Luke's/ San Lucas	66,000	-	-	-	-	-	14,000	14,000	
CC3241 Hyde Park, Christ Church/San Juan	44,000	-	-	-	-	-	66,000	66,000	
CC3251 South End, St. Stephen's	-	138,898	-	-	-	-	138,898	136,707	
CC3311 Boston Chinese Ministries	-	93,328	-	-	-	-	93,328	91,695	
CC3341 Salem, San Pedro	65,000	-	41,000	-	(40,000)	-	1,000	1,000	
CC3351 Lawrence, Grace Church	60,000	-	-	-	-	-	6,000	6,000	
CC3411 Urban Residents	75,000	-	-	-	-	-	1,956	1,909	
CC3431 African Ministries	25,000	-	-	-	-	-	30,000	30,000	
CC3511 Jubilee Global Mission	-	-	-	-	-	45,000	25,000	25,000	
CC3531 Middle East Network Committee	-	-	-	-	-	-	45,000	45,000	
CC3551 Mission Through Partnerships	6,000	-	-	-	-	-	1,000	1,000	
CC3921 Barbara C. Harris Center	1,956	-	-	-	-	-	6,000	6,000	
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	1,956	1,909	
CC3952 UTO/ American Indians /CHS	1,748	-	-	-	-	-	30,000	30,000	
<b>Totals</b>	<b>520,704</b>	<b>689,451</b>	<b>64,500</b>	<b>-</b>	<b>(115,000)</b>	<b>116,137</b>	<b>1,275,792</b>	<b>1,248,108</b>	
2015 Actual									
CC3011 Youth Ministry	51,197	116,721	3,047	373	(32,980)	-	138,358		
CC3012 Youth Leadership Academy	31,801	2,000	1,756	-	(37,390)	-	(1,833)		
CC3056 Life Together	-	-	-	-	-	81,618	81,618		
CC3111 MIT Ministry	1,045	134,045	1,024	3,108	-	-	139,222		
CC3121 Boston University	149	49,029	3,704	-	-	-	52,882		
CC3136 BC/NU Combined	7,521	116,016	3,805	-	-	-	127,342		
CC3141 Northeastern	-	3,076	-	-	-	-	3,076		
CC3171 Tufts University Ministry	8,000	-	-	-	-	-	8,000		
CC3231 Chelsea, St. Luke's/ San Lucas	66,000	-	-	-	-	-	66,000		
CC3241 Hyde Park, Christ Church/San Juan	44,448	-	-	-	-	-	44,448		
CC3251 South End, St. Stephen's	-	133,686	-	-	-	-	133,686		
CC3311 Boston Cantonese Ministries	-	79,906	-	-	-	-	79,906		
CC3321 Quincy Cantonese Ministries	-	-	99	-	-	-	99		
CC3331 Dorchester, St. Mary's	-	-	-	-	-	-	-		
CC3341 Salem, San Pedro	70,000	-	-	-	-	-	70,000		
CC3351 Lawrence, Grace Church	65,000	-	-	-	-	-	65,000		
CC3411 Urban Residents	75,000	-	-	-	-	-	75,000		
CC3431 African Ministries	15,082	-	275	-	-	-	15,357		
CC3511 Jubilee Global Mission	-	-	(4,345)	-	-	45,000	40,655		
CC3531 Committee on Palestine & Israel	-	-	103,220	-	(104,563)	-	(1,343)		
CC3551 Mission Through Partnerships	-	-	7,957	-	-	-	7,957		
CC3921 Barbara C. Harris Center	-	-	367	-	-	-	367		
CC3931 Episcopal City Mission	30,000	-	-	-	-	-	30,000		
CC3952 UTO/ American Indians /CHS	1,583	-	-	-	-	-	1,583		
<b>Totals</b>	<b>466,826</b>	<b>634,479</b>	<b>120,909</b>	<b>3,481</b>	<b>(174,933)</b>	<b>126,618</b>	<b>1,177,380</b>		

Strategic Ministries - Supplemental											
2017 Budget, 2016 Budget and 2015 Actual											
	2017 Budget										
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Cost	Transfers	Revenue Offset	Annual Fund	Use of Proceeds	BDF Grants	Net Cost
2017 Budget											2016 Budget
CC3056 Life Together	55,700	476,362	144,000	32,938	709,000	(75,000)	(486,000)	(102,062)	-	(45,938)	781,000
CC3111 MIT	-	-	-	-	-	3,363	-	-	-	(3,363)	-
CC3131 Boston College	-	-	-	-	-	250	-	(250)	-	-	-
CC3141 Northeastern	-	-	-	-	-	250	-	(250)	-	-	-
CC3221 Brockton, Grace Chapel	-	114,006	-	-	114,006	-	-	-	(114,006)	-	111,771
CC3311 Boston Chinese Congregation	25,000	25,000	-	-	50,000	-	(50,000)	-	-	-	50,000
CC3321 Quincy Chinese Congregation	10,000	-	-	-	10,000	-	(10,000)	-	-	-	10,000
CC3331 Dorchester, St. Mary's	50,000	-	-	-	50,000	-	-	-	-	(50,000)	50,000
CC3361 Watertown, Good Shepherd	30,000	-	-	-	30,000	-	-	-	-	(30,000)	45,000
CC3371 So. Dartmouth, St. Peter's The Bridge	45,000	-	-	-	45,000	-	-	-	-	(45,000)	65,000
CC3411 Urban Residents	11,719	-	-	-	11,719	-	-	(11,719)	-	-	11,719
CC3511 Jubilee Global Mission	46,950	27,409	5,000	-	79,359	(45,000)	(30,784)	-	-	(3,575)	75,784
CC3541 B-SAFE	250,000	-	-	-	250,000	-	-	(125,000)	-	(125,000)	225,000
CC3545 B-PEACE	50,000	-	-	-	50,000	-	-	(50,000)	-	-	50,000
CC3911 Cathedral Church of St Paul	77,000	-	-	-	77,000	-	-	-	-	(77,000)	71,000
<b>Totals</b>	<b>651,369</b>	<b>642,777</b>	<b>149,000</b>	<b>32,938</b>	<b>1,476,084</b>	<b>(116,137)</b>	<b>(576,784)</b>	<b>(289,281)</b>	<b>(114,006)</b>	<b>(379,876)</b>	<b>1,546,274</b>
	2015 Actual										
	Program Expenses	Compensation & Benefits	Operational & Support Svcs	Mgt and Prof Svcs	Total Cost	Transfers	Revenue Offset	Annual Fund	Use of Proceeds	BDF Grants	Net Cost
2015 Actual											
CC3056 Life Together	6,580	427,062	289,582	12,534	735,758	(75,000)	(429,989)	(115,000)	-	(34,151)	81,618
CC3221 Brockton, Grace Chapel	-	107,661	-	-	107,661	-	-	-	(107,661)	-	-
CC3231 Chelsea, St. Luke's/San Lucas	37,340	-	-	-	37,340	-	(37,340)	-	-	-	-
CC3251 South End, St. Stephen's	50,000	-	-	-	50,000	-	-	-	-	(50,000)	-
CC3311 Boston Chinese Congregation	9,142	39,420	-	-	48,562	-	(48,562)	-	-	-	-
CC3321 Quincy Chinese Congregation	11,960	-	1,139	-	13,099	-	(13,000)	-	-	-	99
CC3331 Dorchester, St. Mary's	50,000	-	-	-	50,000	-	-	(50,000)	-	-	-
CC3361 Watertown, Good Shepherd	60,000	-	-	-	60,000	-	-	-	(60,000)	-	-
CC3411 Urban Residents	18,750	-	-	-	18,750	-	-	-	-	(18,750)	-
CC3511 Jubilee Global Mission	21,999	13,425	5,227	4	40,655	(45,000)	-	-	-	-	(4,345)
CC3541 B-SAFE	225,000	-	-	-	225,000	-	-	(125,000)	-	(100,000)	-
CC3545 B-PEACE	50,000	-	619	-	50,619	-	(619)	(50,000)	-	-	-
CC3911 Cathedral Church of St Paul	65,000	-	-	-	65,000	-	-	-	-	(65,000)	-
<b>Totals</b>	<b>605,771</b>	<b>587,568</b>	<b>296,567</b>	<b>12,538</b>	<b>1,502,444</b>	<b>(120,000)</b>	<b>(529,510)</b>	<b>(340,000)</b>	<b>(167,661)</b>	<b>(267,901)</b>	<b>77,372</b>

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

The total 2017 budget for this area is \$2,781,133, with \$2,300,394 in the core budget net of off-setting revenue, and \$480,739 in the supplemental budget. The 2016 core and supplemental budget total was \$2,587,354.

• Area Staff and Expenses: 4000 - Core

This line includes compensation for four positions; others are included in individual cost centers. Development staff compensation is in the supplemental budget. (See roster on pages 59-60.)

• Diocesan Leadership: 4011, 4012, 4014 - Core

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

• Assisting Bishops: 4021 - Core

Stipends and costs for assisting bishops, as needed (\$25,000).

• New Bishop Transition Reserve: 4023 - Core

In January 2015, Diocesan Council established a long-term fund and seeded it with \$250,000 to pay for the costs associated with discernment, election and transition. Council's goal is to contribute \$50,000 per year out of the core budget. This year's contribution is set at \$30,000, which will be added to the \$250,000 extraordinary allocation that Council voted in January 2015, bringing the total balance in the reserve to \$360,000.

• Chancellor: 4031 - Core

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

• Title IV: 4061 - Core

Canonical clergy disciplinary process, budgeted at \$15,000 for 2017. This includes \$2,000 stipends for two non-staff intake officers.

• Diocesan Leadership Budgeted Reserve: 4099 - Core

The entire budgeted amount of \$197,876 for 2017 represents funding for contingencies, staff sabbatical coverage and potential staff compensation increases based upon changed responsibilities.

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

The 2017 amounts budgeted are \$10,000 for Diocesan Council; \$3,000 for Standing Committee; and \$6,000 for the Diocesan Youth Council.

• Mission Strategy: 4112 - Core

Since the new mission strategy will not be determined until Convention, the new mission strategy start-up costs will be funded from the proceeds generated by the sale of the Church of the Holy Spirit in Wayland. New mission strategy programs are expected to be funded in the 2018 budget.

- Diocesan Convention: 4141 - Core

The \$45,000 net costs budgeted for 2017 assume a two-day convention.

- Journals and Diocesan Directory: 4151 - Core

This line is funded at \$12,000.

- Archives: 4211 - Core

An amount of \$25,000 for operational expenses. The salary for an archivist is in cost center 4000.

- Massachusetts Council of Churches: 4251 - Core

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

- Development Office: 4311- Supplemental

Since 2009, the staff of the Office of Development has been, for the most part, funded in the supplemental budget, through a grant from the Bishop's Directed Funds. A portion of the cost of the development staff's compensation and benefits (\$57,366) is allocated to the Together Now campaign. The balance totals \$158,373. An additional \$35,000 is budgeted for events and other expenses.

- Annual Fund: 4312 - Supplemental

Projected expenses for 2017 are \$30,000 based on actuals.

- Mission Hubs: 4343 - Supplemental

In May of 2015, Diocesan Council voted to pledge \$600,000 (\$200,000 per year for three years) from the General Endowment Fund to support funding for the mission hubs. The year 2017 will see the second of these payments made for the hubs. Also see page 47.

- General Convention: 4411 - Core

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

- Province I Assessment: 4421 - Core

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

- Episcopal Church Asking: 4431 - Core

At the 2015 General Convention, the Episcopal Church set a sliding schedule of diocesan ask rates for the next three years as follows: 18% in 2016, 16.5% in 2017 and 15% in 2018.

As part of this new schedule, the diocese elected in 2016 to use the three-year average rate in 2016-2018 to determine the assessment amount budgeted for each of the three years. In 2017 the budgeted amount is \$861,101, which is the pro-rated amount for the year.

Following this process, the diocese remains committed for the 2018 budget to using the same 16.5% in its preparation.





Administrative Services (see table on page 40)

The total 2017 budget for this area is \$1,485,894, all from the core budget. The 2016 core budget total was \$1,359,868.

- Administrative Services: 5000 - Core

This line contains compensation for eight staff positions (see roster on pages 59-60). This budget reflects the realignment of staff between departments, as well as a reduction in hours worked for certain staff.

- Treasurer's Office: 5011 - Core

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

- Human Resources: 5021 - Core

Consultants supplement this vital function as needed (\$10,500).

- Information Technology: 5031 - Core

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

- Risk Management: 5041 - Core

This amount is raised to \$78,400, based on projections related to the cost of insurance. A Church Insurance reimbursement of \$12,000 is for safety audits.

- Investments: 5051 - Core

State Street receives a quarterly fee for the administration of a pooled income fund (estimated market value under \$150,000) for making the required distributions to the beneficiaries and tax reporting. The projected annual cost for 2017 is \$6,000.

- Boston, 138 Tremont Street: 5111 - Core

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

- Brookline, 40 Prescott Street: 5121 - Core

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

- Boston, Commercial Wharf, Unit 6: 5122 - Core

This cost center reflects \$15,000 in condominium fees for the bishop's residence offset by a credit of \$40,761 which reflects the reduction in the bishop's cash salary in exchange for diocesan-provided housing. The size of the credit was set using the Church Pension Fund's "30% rule."

- Allston property: 5125 - Core

The property reverted back to the diocese in 2009 after the Church of St. Luke and St. Margaret closed. The diocese has been paying for its upkeep ever since from the core budget. Bishop Gates, staff and Diocesan Council continue to discern the feasibility and formulation of a strategic plan for an alternative use for this property. The core budget allocation for this property is \$34,000 in 2017. Some of this expense is offset by rental of the rectory to the Life Together program and by other occasional uses of the building by other groups who pay a fee for use of space.

- Diocesan Properties: 5141 - Core

This cost center includes \$10,000 for a consultant on the status and sales of diocesan properties and \$30,000 to be added to the reserve for property maintenance established formally by Diocesan Council in January 2015 and seeded with \$650,000, bringing the total in the reserve, before expenses, to \$720,000. Property insurance increased by \$6,249 and is included in this line item.

- Diocesan Equipment: 5142 - Core

An amount of \$12,500 to be added to a reserve fund to replace or purchase new capital equipment (computers, servers, copiers, etc.) formally established by Diocesan Council in 2015 and seeded with \$150,000, bringing the total in the reserve, before expenses, to \$185,000.





## **Proceeds from Closed Congregations: Additional Information**

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

The following congregations have closed in recent years:

- St. George's Church, Maynard - 2006
- Church of the Holy Trinity, Marlborough - 2008
- St. Luke's Church, Malden - 2008
- St. Andrew's Church, Belmont - 2008
- Church of St. Matthew and The Redeemer, South Boston - 2008
- St. Alban's Church, Lynn - 2009
- St. Augustine's Church, Lawrence - 2009
- St. David's Church, Halifax - 2009
- St. Paul's Church, Brockton - 2010
- St. Luke's and St. Margaret's Church, Allston - 2010
- St. Paul's Church, Millis - 2010
- St. Andrew's Church of the Deaf, Natick - 2011
- Trinity Church, Weymouth - 2013
- Christ Church, Somerville - 2013
- St. David's Church, Pepperell - 2013
- Church of the Holy Spirit, Wayland - 2015

In the transition surrounding a church closing, diocesan staff provide support and services of all kinds. At the end of the closing process, the remaining assets are transferred to the diocese, for Diocesan Council to allocate. In February 2011, Council created a new Fund for Congregational Vitality from 50% of the net proceeds for the above congregations (except Brockton). The balance of the fund as of June 30, 2016, was \$3,976,863. It produces \$150,074 for the core budget to support congregational development around the diocese.

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

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

Diocesan Council has yet to decide as to the disposition of the property of the former Church of St. Luke and St. Margaret, Allston. The Church of the Holy Spirit, Wayland has been sold and the former rectory is on the market. Once all costs related to the sale have been incurred, a full accounting and transfer of the appropriate balance will be made into this fund.

The total proceeds (after expenses) from the former St. Paul's Church and condo in Brockton are currently being used, by vote of Diocesan Council, to fund Grace Chapel, a worshipping community in Brockton.

The table on page 43 shows status of the proceeds for 13 of the closed congregations:

**Proceeds**—Gross revenue from sales and transfers of endowments

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

**Net Proceeds**—Direct costs subtracted from proceeds

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

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

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

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

**Available**—As of June 30, 2016, the balance is \$8,154.

**Episcopal Diocese of Massachusetts**  
**Use of Proceeds from Closed Parishes Summary**  
**As of June 30, 2016**

<u>Parish</u>	<u>Gross Proceeds</u>	<u>Less Direct Costs</u>	<u>Net Proceeds</u>	<u>50% of Net Proceeds</u>	<u>Expended through 2013</u>	<u>Designated or expended to date</u>		<u>Available</u>
						<u>Committed as part of 2014 Budget</u>	<u>Committed as part of 2014 Budget</u>	
Maynard	392,507	(156,858)	235,649	117,825	-	-	-	117,825
Marlborough	317,427	(56,205)	261,222	130,611	-	-	-	130,611
Malden	611,007	(88,698)	522,309	261,154	(175,000)	(43,077)	(43,077)	-
Belmont	1,106,318	(39,797)	1,066,521	533,261	(219,894)	(70,000)	(60,000)	183,367
South Boston	1,106,939	(51,276)	1,055,664	527,832	(527,832)	-	-	-
Lynn	619,978	(153,451)	466,527	233,264	-	-	-	233,264
Lawrence	202,609	(73,837)	128,772	64,386	-	-	-	64,386
Halifax	249,880	(81,169)	168,711	84,356	-	-	-	84,356
Mills	448,030	(89,640)	358,390	179,195	-	-	-	179,195
Natick	255,287	(12,063)	243,224	121,612	-	-	-	121,612
Weymouth	667,724	(175,760)	491,964	245,982	-	-	-	245,982
Somerville	746,280	(84,411)	661,869	330,935	-	-	-	330,935
Pepperell	160,388	(119,742)	40,646	20,323	-	-	-	20,323
	<b>6,884,374</b>	<b>(1,182,907)</b>	<b>5,701,468</b>	<b>2,850,734</b>	<b>(922,726)</b>	<b>(113,077)</b>	<b>(103,077)</b>	<b>1,711,854</b>

**Additional commitments & Date of Council vote:**

2/28/2013	Committed to Chelsea renovation project	(1,200,000)
9/4/2013	Committed to Allston property renovation project	(50,000)
9/6/2014	Committed to Lynn, St. Stephen's for restoration of church and parish house	(100,000)
9/6/2014	Committed to Weymouth, Holy Nativity for support of members from Trinity	(50,000)
1/23/2015	Committed to All Saints, Whitman to support Clergy salary (Years 1-3)	(30,000)
2/26/2015	Committed to Grace, New Bedford as matching grant for capital improvements	(150,000)
2/26/2015	Committed to St. Andrew's, New Bedford for capital improvements	(50,000)
5/21/2015	Committed to Christ Church, Medway for the parish's kitchen improvement project	(35,000)
	Less amount budgeted in 2014 and 2015 to be reimbursed from closed churches	(77,625)
	May 2015 Diocesan Council allocation of Pepperell loan proceeds	38,925
	Available Funds as of 6/30/2016	<b>\$ 8,154</b>

## **Together Now Campaign: Additional Information**

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

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

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

Campaign highlights:

- 100% of the congregations of the diocese elected to participate.
- Nearly 4,000 individual gifts and pledges have been offered.
- Just more than \$20 million was raised for diocesan campaign initiatives.
- An additional \$11.8 million has been raised by 39 local collaborative campaigns, bringing the total raised across the diocese to just under \$32 million.
- In the spring-summer of 2016 three more parishes completed collaborative campaigns. The diocesan portion added additional money for the Mission Hub Initiative totaling approximately \$200,000.

**Final Report of Fundraising  
Highlights as of Sept. 9, 2013**

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

The June 30, 2016, cash flow chart on page 46 reflects the collections of pledges and contributions from individuals and congregations, designated gifts as well as unrestricted gifts. An amount of \$7,921,058 has been returned to collaborative campaign parishes. Expenses fall into two categories: "Direct Campaign Expenses" which reflect money spent on the implementation of the campaign initiatives and "Other Expenses" which are costs associated with fundraising: consultations, fees and expenses. Under "Direct Campaign Expenses," the funds designated to the Barbara C. Harris Camp and Conference Center are included in the Youth and Young Adult column. Likewise, the Cederholm Cottage falls under the Camp and Conference Center column. Now that construction is complete, the Cathedral Church of St. Paul has received its campaign payments in full. Under "Other Expenses," the total amount spent on direct fundraising costs is slightly above 10% of the total raised for the diocesan portion, but when compared to the total raised across the diocese (approximately \$32 million), the percentage is a very favorable 7.3%.

Since the fundraising portion of the campaign began nearly five years ago, \$24,494,087, or 77%, of the total amount pledged has been received, thanks to the generosity and faithfulness of our donors. We hope that donors will continue to fulfill pledges in full so that all of the funds committed to the campaign initiatives can continue to be expended for God's mission across the diocese and beyond.

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

**Together Now Campaign**  
**Cash Basis Revenues and Expenses**  
**From Inception to June 30, 2016**

	<u>General Restriction</u>	<u>Mission Tithe</u>	<u>Environmental Initiatives</u>	<u>Mission Hubs</u>	<u>Mission Institute</u>	<u>Y&amp;Y Adults</u>	<u>Cathedral Renovations</u>	<u>Total</u>
<b>Revenues</b>								
Leadership Gifts	8,791,901	-	750	739,784	376,500	636,118	1,126,933	11,671,986
Collaborative Gifts from parishes (100% gross)	11,543,020	-	-	-	-	17,500	-	11,560,520
In pew collections	1,259,897	-	-	-	-	-	-	1,259,897
Interest Income	1,684	-	-	-	-	-	-	1,684
<b>Gross Revenue</b>	<b>21,596,502</b>	<b>-</b>	<b>750</b>	<b>739,784</b>	<b>376,500</b>	<b>653,618</b>	<b>1,126,933</b>	<b>24,494,087</b>
Less payments to collaborating parishes to date (70%)	(7,921,058)	-	-	-	-	-	-	(7,921,058)
<b>Net Revenues</b>	<b>13,675,444</b>	<b>-</b>	<b>750</b>	<b>739,784</b>	<b>376,500</b>	<b>653,618</b>	<b>1,126,933</b>	<b>16,573,029</b>
<b>Direct Expenses</b>								
Compensation and benefits	658,613	113,061	11,000	1,761,024	258	-	44	2,544,000
Direct Campaign Expenses, non compensation	200	773,300	813,868	299,106	642,268	1,982,228	3,894,000	8,404,970
Direct Program Expenses	1,304	5,016	2,365	376,379	-	-	-	385,064
<b>Total Direct Expenses</b>	<b>660,117</b>	<b>891,377</b>	<b>827,233</b>	<b>2,436,509</b>	<b>642,526</b>	<b>1,982,228</b>	<b>3,894,044</b>	<b>11,334,034</b>
<b>Other Expenses</b>								
Operating and staff support	568,982	12,855	4,203	1,710	151	50	-	587,951
Technology costs	3,479	-	-	540	-	-	-	4,019
Facilities and other services	30,160	-	-	-	-	-	-	30,160
Management and professional services	1,941,397	30	3,780	-	-	-	-	1,945,207
<b>Total Other Expenses</b>	<b>2,544,018</b>	<b>12,885</b>	<b>7,983</b>	<b>2,250</b>	<b>151</b>	<b>50</b>	<b>-</b>	<b>2,567,337</b>
<b>Total Expense</b>	<b>3,204,135</b>	<b>904,262</b>	<b>835,216</b>	<b>2,438,759</b>	<b>642,677</b>	<b>1,982,278</b>	<b>3,894,044</b>	<b>13,901,371</b>
<b>Net Cash Inflow from inception</b>	<b>10,471,309</b>	<b>(904,262)</b>	<b>(834,466)</b>	<b>(1,698,975)</b>	<b>(266,177)</b>	<b>(1,328,660)</b>	<b>(2,767,111)</b>	<b>2,671,658</b>

CAMPAIGN BUDGET		MISSION HUBS	ST STEPHENS SOUTH END and LIFE TOGETHER	GREEN GRANTS AND LOANS	CATHEDRAL	CAMP	MISSION INSTITUTE	MISSION TITHE	NET CAMPAIGN EXPENSES	RESERVES	TOTAL
<b>INITIAL ALLOCATION</b>		<b>6,500,000</b>	<b>0</b>	<b>2,000,000</b>	<b>4,000,000</b>	<b>2,000,000</b>	<b>1,000,000</b>	<b>2,000,000</b>	<b>2,500,000</b>	<b>0</b>	<b>20,000,000</b>
previously presented reallocation (1)		250,000		(100,000)	(150,000)						0
separate St Stephens SE (2)		(500,000)	500,000						800,000		0
additional admin/consultants		(800,000)									0
<b>RUNNING TOTAL A</b>		<b>5,450,000</b>	<b>500,000</b>	<b>1,900,000</b>	<b>3,850,000</b>	<b>2,000,000</b>	<b>1,000,000</b>	<b>2,000,000</b>	<b>3,300,000</b>	<b>0</b>	<b>20,000,000</b>
ECM pledge for Life Together (3)			(350,000)					(250,000)			(350,000)
pledge for Bp Masereka Fdn (US) (4)			350,000					250,000			(250,000)
Diocesan matching grant (5)		240,000									600,000
transfer (6)							(240,000)				0
<b>RUNNING TOTAL B</b>		<b>5,690,000</b>	<b>500,000</b>	<b>1,900,000</b>	<b>3,850,000</b>	<b>2,000,000</b>	<b>760,000</b>	<b>2,000,000</b>	<b>3,300,000</b>	<b>0</b>	<b>20,000,000</b>
primary adjustment for reserves (7)		(290,000)	0	(140,000)	0	0	(60,000)	(145,000)	0	635,000	0
secondary adjustment for reserves (7)		0	0	0	(170,000)	(145,000)	0	0	0	315,000	0
<b>CURRENT ALLOCATION</b>		<b>5,400,000</b>	<b>500,000</b>	<b>1,760,000</b>	<b>3,680,000</b>	<b>1,855,000</b>	<b>700,000</b>	<b>1,855,000</b>	<b>3,300,000</b>	<b>950,000</b>	<b>20,000,000</b>

HUB ALLOCATION WITHIN \$20 MILLION CAMPAIGN BUDGET	
South Coast	1,200,000
Cape and Islands	500,000
Merrimack Valley	1,000,000
Metrowest	1,000,000
North Shore	1,000,000
South Shore	400,000
Roxbury/Dorchester	150,000
Boston/Cambridge	150,000
First Year	
First Year	
<b>Total Mission Hubs funded by the first \$20 million</b>	<b>5,400,000</b>

**NOTES, ASSUMPTIONS, AND ACTIONS**

- Earlier re-allocation decision
- Grant directed to programs at St Stephen's South End is separated from Mission Hubs budget
- The ECM pledge for Life Together supports activities budgeted through the supplemental budget
- The campaign accepted an anonymous pledge to support the Bishop Masereka Foundation (US) directly
- The Diocesan Council approved a new unrestricted \$600,000 grant to match the ECM/Life-Together and Bp Masereka Foundation (US) pledges
- Transfers \$240,000 from the Mission Institute target funding to the Mission Hubs
- Establishes a reserve of \$950,000 against delinquent and incomplete pledges. The Cathedral and Camp will not be charged unless more than \$635,000 is needed.
- The target funding levels for the first five mission hubs approved is not cut within the first \$20 million
- Potential priorities for the "cautious faith budget", requiring an additional \$1.89 million
  - Full South Shore funding 350,000
  - Full Roxbury/Dorchester funding 850,000
  - Boston/Cambridge Hub 450,000
  - Restore Mission Institute full funding 240,000

**TOTAL OPPORTUNITIES FUNDED FROM RE-OPENED CAMPAIGN 1,890,000**



## **Endowment Funds**

The financial operations of the diocese are supported by various endowment funds.

Agency Funds are funds owned outright by the diocese. The treasurer and Diocesan Council are ultimately responsible for the investment and use of these funds. Diocesan Council relies on its Financial Advisory Committee to monitor these funds, and the Council has in place a written Investment Policy Statement (see [www.diomass.org/inside/docs/investment-policy-statement](http://www.diomass.org/inside/docs/investment-policy-statement)). In the audited financial statements of the diocese, the Agency Funds are included as “Investments” within the listing of Assets of the Diocese. As of Dec. 31, 2015, the reported value of Investments was \$33,975,784.

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

Those trusts for which the diocese’s claim as a beneficiary is absolute and not subject to the discretion of the trustees appear in the financial statements as “Beneficial interest in perpetual trusts” within the listing of Assets of the Diocese. As of Dec. 31, 2015, the reported value of Beneficial interest in perpetual trusts was \$31,549,969.

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

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

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

Diocesan Endowment Funds and Bishop Directed Funds – See tables on pages 53-55.

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

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

One of the goals of the 2008 reorganization of diocesan operations (see page 18) was increased clarity and transparency around the BDF’s. A key organizational tool was the identification of two separate budgets, the “core” budget and the “supplemental” budget. The supplemental budget provided a place to budget and reveal spending supported by the BDF’s and other revenue streams over which the bishop has greater influence. Over time, this process has become more regular and formalized around the notion of “BDF grants.” In the 2017 budget, the supplemental budget includes approximately \$695,000 of BDF grants and associated expenditures.

At the same time, the BDF's are also there to support true discretionary spending by the bishop, some of which is appropriately not run through the supplemental budget. This is a judgment call appropriately left to the diocesan bishop, and is a small part of the total BDF spending. For 2017, the BDF grants in the supplemental budget represent almost 94% of the available BDF income for the year.

### Fund Restrictions

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

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

### Description of Agency Funds

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

### ***Unrestricted***

- The General Endowment Fund (DIT 7002X, proposed draw \$107,362)

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

### ***Council Designation for Reserves***

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

In January 2015, Diocesan Council established three new reserve accounts for property maintenance, episcopal elections and capital equipment, and it transferred \$1,050,000 from the General Endowment Fund to a Fidelity short term bond fund to support these reserves. The creation of these accounts reduces the need to draw upon the General Endowment Fund for capital needs. The Executive Committee of Diocesan Council responds to requests for funding from these accounts. Note, this fund is not listed on page 53 since it does not contribute to the core budget revenue from agency endowments.

### ***Council Designation of Closed Parish Proceeds***

- The Fund for Congregational Vitality (DIT 7004I, proposed draw \$150,074)

This fund was initially established in 2011 with half of the net proceeds from nine closed congregations. Since then, Council has followed the same policy of putting a portion of proceeds from other closed congregations into this endowment fund. In addition, Council has consolidated

existing endowment funds that were also created through the proceeds of closed congregations going back to the mid-1980's. A full list of all the congregations that have contributed to the Fund for Congregational Vitality is on page 41. The spending draw from this fund helps pay for the congregational grant programs, cost centers 2011 and 2012.

- Deaf Ministry Endowment (DIT 7004H, proposed draw \$8,000)

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

- Endowment Fund - Roslindale (DIT 7002Z, proposed draw \$3,972)

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

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

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

- DAF Bishop Nash Fund (DIT 7002M, proposed draw \$9,055)

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

- Clergy Salary Fund (DIT 7002N, proposed draw \$33,254)

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

- Campus Ministries Fund (DIT 7002U, proposed draw \$10,461)

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

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

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

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

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

- AIM Christian Witness in Education (DIT 7003C, proposed draw \$ 41,676)

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

- Youth on Mission (DIT 7003E, proposed draw \$7,899)

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

- AIM William Coolidge Endowment Fund (DIT 7003F, proposed draw \$164,439)  
This fund provides broad support for programs offered in the Congregational Resources and Training and Strategic Ministries areas of the budget.

- AIM Hospital Ministry (DIT 7002J, proposed draw \$25,073)  
Hospital ministry was a part of both the DAF and the AIM campaigns, and archival evidence suggests that this fund has its roots in the 1960s DAF drive. In recent years, hospital ministry has not had a high profile in the annual budget. The clergy supported through various cost centers do provide hospital ministry as a regular part of their service.

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

- John B. Coburn Endowment Fund (DIT 7002C, proposed draw \$54,889)  
The Rt. Rev. John B. Coburn, the 13th bishop, served from 1976 to 1986. Upon his retirement Council established this fund in his honor to support “a Chair of Theology for the Mission of the Church.” It is the expectation to fund theological programs in 2017.

- Frederick C. Lawrence/Rhineland Fund (DIT 7002P, proposed draw \$11,098)  
The Rt. Rev. Frederick C. Lawrence was bishop suffragan from 1956 to 1968. He also served as the chairman of the Bishop Rhineland Foundation, which provided support for Harvard-Radcliffe chaplaincy. Council established a fund in his honor upon his retirement, and for the next 12 years the draw supported the Foundation. More recently, the draw has supported college ministry work in Cambridge through the Life Together program and the MIT chaplaincy.

- African Scholarship Fund (DIT 7002E, proposed draw \$11,418)  
Council created this fund in 1988 for a scholarship program for African students, currently supported through the MSASA Episcopal Divinity School program, cost center 1213.

- Endowment for Maintenance (DIT 7002G, proposed draw \$8,822)  
Council in 1990 created this fund with the proceeds of a bequest. The written record from that time recommended that future Councils direct one-third of future bequests to this fund account, at least until it reached a balance of \$500,000. In January 2015 Council voted to establish the Reserve Endowment Fund (described above) and to formally replace the 1990 policy. The motivation to do so was to separate the ministry of maintenance from the random arrival of bequests. The spending draw from this existing endowment account will continue to support regular maintenance needs through cost centers 5111 through 5125.

- Seminarian Education Endowment Fund (DIT 7004E, proposed draw \$55,363)  
Created to support seminarian education through the scholarship program in cost center 1312.

### ***Council Designation of Proceeds from Other Properties***

- Eliza Gray Case TRS P E C (DIT 7002T, proposed draw \$135,162)  
Council received these funds when the Eliza Gray Case home was sold. The legal review of the sale determined that the funds can be used for the Sherrill House in Boston, for general purposes of the diocese or for purposes in southeast Massachusetts. The current application is to support the Bristol County Case Grants program, cost center 2013.

- House of Mercy Fund (DIT 7002Y, proposed draw \$31,703)  
Council received these funds when the Works of Mercy was dissolved in 1975. The current application is to support grants through the 12 deanery assemblies for community outreach programs, cost center 2022.

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

These funds provide general support for diocesan operations through the core budget:

- Adelaide R. Harris Fund (DIT 7002S, proposed draw \$222)
- R. W. Chisolm Fund (DIT 7003R, proposed draw \$4,082)

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

• Thomas M. Coffin Fund (DIT 8000V, proposed draw \$5,705)  
Established in 1939 “for needy churches in the diocese,” currently applied to the Strategic Ministries area.

• A. E. Emery Camp Dennen Fund (DIT 7002O, proposed draw \$1,956)  
Established by a bequest in 1976, currently used to provide a grant to the Barbara C. Harris Camp and Conference Center, cost center 3921.

• Harriet G. Averill Fund (DIT 7002L, proposed draw \$1,748)  
Established by a bequest in 1976, for equal sized grants to American Indian Missions and to the United Thank Offering. The current application supports a grant to the Native American Lillian Valley School in Idaho, cost center 3952.

• Caroline C. Haskett Fund (draw 7002R, proposed draw \$88)  
A small fund established in 1978, identified for support of Church Home Society and orphan children. Given the size of the draw, it is implicitly used for basic infrastructure support for the Church Home Society operations.

• Jessie B. Cox Fund (DIT 7003A, proposed draw \$34,460)  
Established in 1980, this draw supports recently ordained clergy in training under the supervision of an experienced clergy person. The current application supports the Urban Resident program in cost center 3411.

• William V. Tripp Jr. Memorial Fund (DIT 7003B, proposed draw \$44,137)  
Established in 1987 to support the position of diocesan youth minister, cost center 3011.

• C.L.T. Lee / B. Wong Fund (DIT 7002D, proposed draw \$5,024)  
Established in 1988 to support ministry among Asian Americans, cost center 3311.

### ***Designation of Gifts and Bequests for Parishes***

• Abby Jackson Fund (DIT 8000W, proposed draw \$3,213)  
Established in 1939 to support grants to Christ Church, Plymouth, included in cost center 2014.

• Amelia Grant Schwarz Fund (DIT 7002W, proposed draw \$21,742)  
Established in 1947 to provide an annual grant for the housing costs of the rector of St. John’s, Sharon, included in cost center 2014.

### ***Designation of Gifts and Bequests for the Bishop***

• Maurine C. Coburn Trust (DIT 7003D, proposed draw \$7,451)  
Established in 1987 for assistance of clergy at the discretion of the bishop, included in cost center 4011.

• Bishop’s Entertainment Fund (DIT 8000X, proposed draw \$6,891, plus 16,000 shares Proctor & Gamble, projected \$42,400 in dividend income)  
Both the DIT fund and the share holdings are related to a single gift in 1969 for the bishop to provide hospitality for clergy and visitors. In recent years this income has subsidized the annual clergy conference.

• Frederick A. Reeve Fund (DIT 8000T, proposed draw \$9,623)  
Established in 1991 for use by the bishop, included in cost center 4011.



<b>AGENCY ENDOWMENTS</b>	<b>Market Value of Fund -</b>	
	<b>6/30/2016</b>	<b>4% Draw</b>
D7002X GENERAL ENDOWMENT FUND	2,940,748	107,362
D7002C JOHN B COBURN ENDOWMENT FUND	1,349,693	54,889
D7002D C.L.T. LEE / B. WONG FUND	123,430	5,024
D7002E AFRICAN SCHOLARSHIP FUND	280,768	11,418
D7002G ENDOWMENT FOR MAINTENANCE	216,982	8,822
D7002J AIM / HOSPITAL MINISTRY	616,522	25,073
D7002L HARRIET G AVERILL FUND	42,978	1,748
D7002M D A F BISHOP NASH FUND	222,667	9,055
D7002N CLERGY SALARY FUND	817,694	33,254
D7002O A E EMERY CAMP DENNEN FUND	48,096	1,956
D7002P FREDRICK C LAWRENCE/RHINELANDER FUND	272,895	11,098
D7002R CAROLINE C HASKETT FUND	2,174	88
D7002S ADELAIDE R HARRIS FUND	5,451	222
D7002T THE ELIZA GRAY CASE TRS P E C	3,322,685	135,162
D7002U CAMPUS MINISTRIES FUND	257,236	10,461
D7002W AMELIA GRANT SCHWARZ FUND	527,241	21,742
D7002Y HOUSE OF MERCY FUND	779,562	31,703
D7002Z ENDOWMENT FUND - ROSLINDALE	97,125	3,972
D7003A THE JESSIE B COX FUND	847,361	34,460
D7003B WILLIAM V. TRIPP JR. MEMORIAL FUND	1,085,311	44,137
D7003C AIM CHRISTIAN WITNESS IN EDUC	1,024,796	41,676
D7003D MAURINE C COBURN TRUST	183,210	7,451
D7003E YOUTH ON MISSION	194,230	7,899
D7003F AIM WILLIAM COOLIDGE ENDOWMENT FD	4,043,501	164,439
D7003R W. CHISOLM FUND	100,385	4,082
D7004E SEMINARIAN EDUCATIONAL ENDOWMENT	1,361,184	55,363
D7004H DEAF MINISTRY ENDOWMENT	648,797	25,747
D7004I FUND FOR CONGREGATIONAL VITALITY	3,976,863	150,074
D8000T FREDERICK A REEVE FUND	236,553	9,623
D8000V THOMAS M COFFIN FUND	140,230	5,705
D8000W A. JACKSON FUND	78,937	3,213
D8000X BISHOPS ENTERTAINMENT	169,402	6,891
<b>TOTAL</b>	<b>26,014,709</b>	<b>1,033,809</b>

<b>TRUST ENDOWMENTS</b>	<b>Market Value of Fund -</b>	
	<b>6/30/2016</b>	<b>4% Draw</b>
D2110B G & S TURNER MEMORIAL FUND	14,997	614
D4065A ST MATTHEWS ENDOWMENT FD	164,048	6,717
D4065B SAMUEL & EMMA DOWNING FD	8,645	354
D4065C JOSEPH C STOREY FUND	95,200	3,898
D4065D MARY A WILSON FUND	50,135	2,053
D4065E A SMITH FUND FOR RECTORY MAINTENANCE	72,617	2,973
D7000A DIOCESAN ENDOWMENT FUND	5,018,979	205,535
D7000B VOTE OF CORP DIOCESAN FUND - VOC	1,994,244	81,663
D7000D FAY DONATION I	260,396	10,663
D7000G BENJAMIN LEEDS FUND - VOC	5,403,510	221,276
D7000I CHURCHES AND CHAPELS FUND - VOC	97,985	3,968
D7001E APPLETON FUND	54,041	2,213
D7001F BISHOP'S FUND	1,267,894	51,920
D7001G BISHOP OF MA SALARY FUND	159,640	6,537
D7001H BISHOPS HOUSE FUND	262,048	10,731
D7001I SUFFRAGAN BISHOPS FUND	1,026,098	42,018
D7001J CAMILLA DAVENPORT FUND	40,192	1,646
D7001K CORNELIA A FRENCH FUND	898,504	36,794
D7001L KATHERINE FRENCH FUND	186,745	7,647
D7001O ETHEL A CLARK FUND	1,230,793	50,401
D7001Q MARY K D BABCOCK FD I	285,907	11,708
D7001R MARY K D BABCOCK FD II	35,683	1,461
D7001S JULIA K DAVEY FUND	88,855	3,639
D7001T WILLIAM C WINSLOW FUND - VOC	13,019	533
D7001W WK OF MERCY HARVISON FUND	48,079	1,969
D7001X AMY YEAMES FUND	57,685	2,362
D7001Y EDITH MUNRO FUND	25,194	1,032
D7002Q AC BULLARD FD STUDENTS	242,431	9,927
D7003X PATTON MEMORIAL FUND	1,310,830	53,652
D7004B PATTON FUND FOR MAINTENANCE	108,107	4,425
D7004C KATHERINE M. FOSTER TRUST	228,151	9,338
D7004D FRANK H. BURNETT FUND	47,231	1,933
D9000Z ABBY BROWN TRUST - VOC	189,306	7,752
D9001B EDMUND F SLAFTER FUND II	118,545	8,137
<b>TOTAL</b>	<b>21,105,733</b>	<b>867,489</b>

		<b>Market Value of Fund -</b>	
		<b>6/30/2016</b>	<b>4% Draw</b>
<b>UNRESTRICTED BDF ENDOWMENTS</b>			
D8000B	BISHOPS UNREST. DISCRETIONARY FUND	3,654,404	149,647
D8000D	MARIA A APPLETON DODGE FUND	1,608,071	65,850
D8000G	MARGARET KIMBALL FUND	64,323	2,634
D8000J	THOMAS NELSON MEMORIAL FUND	22,306	913
D8000K	S & F ROWE FUND	22,403	917
D8000L	VALENTINE SLATERY FUND	20,097	823
D8000P	AMELIA WORTHINGTON FUND II	612,579	25,085
D8000U	H.S. HOWE FUND	1,357,659	55,596
D9000M	SARAH H A BURNHAM FUND	1,687,474	69,102
D9000N	THERESA COOLIDGE FUND	114,003	4,668
D9000Q	ELIZA S HATFIELD FUND - VOC	1,249,905	51,183
D9000S	FRANCIS S PARKER FUND	686,465	28,111
D9000U	AGNES WINSLOW RILEY FUND	347,715	14,239
D9000V	SARAH L SLATTERY FUND	122,624	5,021
D9000X	FRANCES L WHITTEMORE FUND	144,278	5,908
D9000Y	ROBERT E TOWNSEND TRUST - VOC	84,899	3,477
		<b>11,799,206</b>	<b>483,174</b>
<b>RESTRICTED BDF ENDOWMENTS</b>			
D7001C	PERCIVAL L & JULIA A POWELL	333,822	13,670
D8000A	MONKS/STEVENS/PITTMAN	699,740	28,654
D8000C	ANNIE O BALDWIN FUND II	15,311	627
D8000E	PAULINE CONY DROWN FUND	56,359	2,308
D8000F	HILL FUND	292,912	11,995
D8000H	LAURA R LITTLE MEMORIAL FUND	55,708	2,281
D8000I	EDWARD F MCINTIRE FUND	16,634	681
D8000M	PATIENCE H SLOANE FUND	221,165	9,057
D8000N	GEORGE AUGUSTUS STRONG MEM FUND	36,579	1,460
D8000O	AMELIA WORTHINGTON FUND I	424,154	17,369
D8000Q	SHERBONDY FUND	4,268	175
D8000R	THE DILL FUND	82,039	3,359
D8000S	ANNA MUIRSON JOHNSON BELLAMY FD	25,324	987
D9000L	EAST CAMBRIDGE FUND - ASCENSION	84,525	3,463
D9000O	FAY DONATION II	260,396	10,663
D9000P	WILLIAM A GATCHELL FUND	826,594	33,849
D9000T	SWANSEA RESTHOUSE FUND	2,782,017	113,923
D9000W	C HARRISON SOWDON FUND - VOC	94,812	3,883
		<b>6,312,360</b>	<b>258,404</b>
<b>TOTAL</b>		<b>18,111,565</b>	<b>741,578</b>



Grants to Congregations in 2015

Congregational Development Open Grants			\$150,000
Congregation	City	Program	Grant Amount
<i>common cathedral</i>	Boston	<i>common art</i>	7,100
St. Paul's Church	Bedford	First Impressions of St. Paul's	2,950
St. Stephen's Church	Boston	BLOCS	4,400
St. James's Church	Cambridge	New Antiracism Initiatives	10,000
All Saints of the North Shore	Danvers	All Sinners and Saints	7,700
Grace Church	Everett	Adult Bible Study Reboot	3,900
St. Luke's Church	Fall River	Welcome the Visitor Program	5,600
Trinity Church	Haverhill	Sing a New Church Phase 2	3,000
St. Stephen's Church	Lynn	Leadership, Learning, and Liturgy	8,000
St. Andrew's Church	New Bedford	Strengthening Our Foundations	4,800
St. Thomas's Church	Taunton	New Signs for New Property	3,000
			60,450

Congregational Development Targeted Grants			\$60,000
Congregation	City	Program	Grant Amount
Lower Merrimack Valley Collaborative		various projects	10,500
Trinity Church	Bridgewater	full-time rector salary	12,000
St. Stephen's Church	Cohasset	Screening of <i>Traces of the Trade</i>	2,021.75
St. Andrew's Church	Hanover	Stewardship Challenge	9,000
St. Paul's Church	Hopkinton	bridge priest	11,608
St. Andrew's Church	New Bedford	Special Needs for 5th-graders	7,700
St. Andrew's Church	Wellesley	Partnership with Wellesley Chaplaincy	4,150
			56,980

House of Mercy Deanery Grants			\$30,488
Congregation	City	Program	Grant Amount
<b>Alewife Deanery</b>			
St. Paul's Church	Bedford	Family Gift Cards	1,080
St. James's Church	Cambridge	Helping Hand Food Pantry	380
St. Peter's Church	Cambridge	Afterworks Program	540
Christ Church	Waltham	Diaper Depot	540
<b>Boston Harbor Deanery</b>			
Emmanuel Church	Boston	BostonWarm	1,500
St. Stephen's Church	Boston	Teen Employment and Leadership Development	1,040
<b>Cape &amp; Islands Deanery</b>			
St. Mary's Church	Barnstable	Amazing Grace of Cape Cod	2,540
<b>Charles River Deanery</b>			
All Saints' Church	Brookline	Baby's Smart Start	800
Christ Church	Needham	Circle of Hope porta-cribs	940
St. Andrew's Church	Wellesley	St. Andrew's/St. Stephen's Mission Partnership	800
<b>Merrimack Valley Deanery</b>			
Trinity Church	Haverhill	Dinah's House	1,600
St. Paul's Church	Newburyport	Food Voucher Program	940
<b>Mt. Hope/Buzzards Bay Deanery</b>			
Grace Church	New Bedford	Laundry Love	2,540
<b>Neponset River Deanery</b>			
Church of the Advent	Medfield	Family Move-out Kits for Medway Family Shelter	1,528
<b>North Shore Deanery</b>			
All Saints of the North Shore	Danvers	supplies for homeless children	1,500
St. Stephen's Church	Lynn	parenting workshops for parents of adolescents	1,040
<b>South Shore Deanery</b>			
Emmanuel Church	Braintree	KidzCloset	845
St. Andrew's Church	Hanover	Wellspring	850
Trinity Church	Marshfield	Carolina Hill shelter	845
			21,848

Sending Serving Deanery Grants			\$48,000
Congregation	City	Program	Grant Amount
<b>Alewife Deanery</b>			
St. Paul's Church	Bedford	Appalachia Service Project	950
St. Mark's Church	Burlington	Pumpkin Patch Ministry	500
St. James's Church	Cambridge	Helping Hand Food Pantry	1,000
St. James's Church	Somerville	ESL Education Program	250
Christ Church	Waltham	Diaper Depot	1,000
Church of the Good Shepherd	Watertown	Vacation Garden School	300
<b>Boston Harbor Deanery</b>			
Church of the Advent	Boston	Tuesday Community Supper	1,500
The Crossing	Boston	Confronting Racism Program	1,750
St. Stephen's Church	Boston	Teen Employment and Leadership Development	750
<b>Charles River Deanery</b>			
All Saints' Church	Brookline	Playground for St. Francis Xavier Parish	2,000
Christ Church	Needham	Haiti Music Program	1,750
<b>Concord River Deanery</b>			
St. Andrew's Church	Framingham	Millennials' Habitat for Humanity Build Day	375
<b>Merrimack Valley Deanery</b>			
St. James's Church	Groveland	Mitch's Place	300
Grace Church	Lawrence	Radio Program	2,400
St. John's Church	Lowell	KALEIDOSCOPE	1,300
<b>Mt. Hope/Buzzards Bay Deanery</b>			
St. Andrew's Church	New Bedford	Outreach Sunday School	2,000
<b>Neponset River Deanery</b>			
St. Michael's Church	Milton	Safe Passage in Guatemala	3,000
<b>North Shore Deanery</b>			
St. Peter's Church	Beverly	Sunday Night Suppers	1,000
All Saints of the North Shore	Danvers	holiday party for foster children	1,000
St. Stephen's Church	Lynn	Kids in Community summer program	2,000

<b>South Shore Deanery</b>				
St. John's Church	Holbrook	Family Partnerships of the Southeast Medically Complex Program		1,050
<b>Taunton River Deanery</b>				
Trinity Church	Bridgewater	J2A Pilgrimage		4,000
				<b>30,175</b>
<b>Case Trust and Bristol County Fund</b>				<b>\$123,207</b>
<b>Congregation</b>	<b>City</b>	<b>Program</b>		<b>Grant Amount</b>
South Coast Mission Hub		Life Together Young Adult Community; Grass Roots Initiative; Project Discovery		17,500
All Saints' Church	Attleboro	One Family, A Mission of Unity		6,000
St. Peter's Church	Dartmouth	The Labyrinth for Healing and Renewal; Christmas Homeless Outreach Ministry; Breakfast with Santa		4,400
Church of the Good Shepherd	Fairhaven	Spirit of Grace		3,500
Church of the Holy Spirit	Fall River	Bayside Fellowship; Senior Fellowship; Outreach and Publicity; Summer Family Carnival		12,500
St. Luke's Church	Fall River	Urban Youth Education and Empowerment Program		10,000
Grace Church	New Bedford	God Loves Our Rosebud Youth Mission Trip; Food Pantry		6,500
St. Andrew's Church	New Bedford	Sustaining a Community of Children		18,000
Grace Church	North Attleborough	E-Cubed Academy Healthy Snacks		10,500
Bristol Trinity Episcopal Church	North Easton	Taunton Area Community Table; Tide Me Over; Backpack Outreach Program; Taunton Laundry Love		20,200
Church of Our Saviour	Somerset	Annual Parish Retreat; Annelle Delorme-Hagerman Food Pantry		4,700
St. Thomas's Church	Taunton	Senior Ministry		2,500
				<b>116,300</b>
<b>Creation Care Initiative: Simple Acts of Stewardship Grants</b>				
<b>Congregation</b>	<b>City</b>	<b>Program</b>		<b>Grant Amount</b>
St. John's Church	Jamaica Plain	Dawn Tesorero's GreenFaith Fellowship Tuition		1,000
St. Mary of the Harbor	Provincetown	creation care newspaper ads		1,000
Trinity Church	Stoughton	Environmental Stewardship Assessment		247.50
Emmanuel Church	West Roxbury	memorial garden and adult education series		1,000
				<b>3,248</b>
<b>Creation Care Initiative: Green Improvement Grants</b>				
<b>Congregation</b>	<b>City</b>	<b>Program</b>		<b>Grant Amount</b>
Church of the Good Shepherd	Acton	parking lot LEDs; on-demand DHW		5,000
All Saints' Church	Attleboro	interior storm windows; insulation; ceiling fans; thermostat relocation		10,000
St. John's Church	Charlestown	parish house windows		10,000
All Saints' Church	Chelmsford	furnace and smart thermostats		10,000
Trinity Church	Concord	energy-efficient windows in undercroft		10,000
Church of the Good Shepherd	Dedham	energy-efficient lights and windows		9,986
St. Mary's Church	Dorchester	3rd-floor apartment mini-split system; insulation		8,000
St. James's Church	Groveland	windows and education program		9,035
St. Gabriel's Church	Marion	solar electricity system		5,000
Christ Church	Needham	insulation and low-flow toilets		10,000
Grace Church	Norwood	LEDs and fixtures		10,000
Church of the Holy Spirit	Orleans	insulation		2,000
Church of the Good Shepherd	Reading	windows		10,000
St. Mark's Church	Southborough	church and parish hall LEDs		9,000
St. Thomas's Church	Taunton	heat pumps and windows		10,000
Emmanuel Church	West Roxbury	interior storm windows		2,400
St. Peter's Church	Weston	zoning; thermostats; outdoor reset		10,000
Trinity Church	Wrentham	windows		10,000
				<b>150,421</b>
<b>Mission Tithe Matching Grants</b>				
<b>Congregation</b>	<b>City</b>	<b>Program Location</b>		<b>Grant Amount</b>
Church of the Good Shepherd	Acton	El Ocotillo, El Salvador		7,500
St. Stephen's Church	Boston	Appalachia		10,000
St. Christopher's Church	Chatham	Goll Farm, Liberia		7,000
Church of St. John the Evangelist	Duxbury	Tegucigalpa, Honduras		6,000
Church of Our Redeemer	Lexington	Tegucigalpa, Honduras		10,000
St. Paul's Church	Natick	Mpwapwa, Tanzania		10,000
Grace Church	North Attleborough	Tanga, Tanzania		9,500
				<b>60,000</b>
<b>Continuing Education Grants</b>				
<b>Congregation</b>	<b>City</b>	<b>Program</b>		<b>Grant Amount</b>
St. Mary's Church	Barnstable	Holy Land Pilgrimage		500
Trinity Church	Bridgewater	Clergy Supervision & Support		500
St. Paul's Church	Dedham	Celtic Christian Pilgrimage to Ireland		500
Ascension Memorial Church	Ipswich	Contemplative Retreat		500
Church of the Good Shepherd	Reading	Education for Ministry Training		350
All Saints' Church	Stoneham	Fundamentals of Transitional Ministry		500
St. Elizabeth's Church	Sudbury	MBSR Course: "Mindfulness Practices"		346.12
St. Elizabeth's Church	Sudbury	Public Witness & Community Partnership		500
Trinity Church	Topsfield	Holy Land Pilgrimage		500
Church of the Holy Spirit	Wayland	Celtic Christian Pilgrimage to Ireland		500
Paul Bresnahan		Racism in America		450
Susanne George		Deacons' Triennial Assembly		500
				<b>5,646.12</b>
<b>Sabbatical Funds</b>				
<b>Congregation</b>	<b>City</b>			<b>Grant Amount</b>
All Saints' Church	Belmont			4,000
Trinity Church	Bridgewater			4,000
Grace Church	Everett			4,000
Church of the Holy Spirit	Fall River			4,000
Trinity Church	Haverhill			4,000
St. Thomas's Church	Taunton			4,000
				<b>24,000</b>
<b>Winter Relief Grants</b>				
				<b>Grant Amount</b>
Church of The Good Shepherd	Acton	Winter Relief Grant		500
Christ Church	Andover	Winter Relief Grant		500
St. John's Church	Arlington	Winter Relief Grant		500
St. Andrew's Church	Ayer	Winter Relief Grant		500
St. Mary's Church	Barnstable	Winter Relief Grant		500
St Paul's Church	Bedford	Winter Relief Grant		500
St Peter's Church	Beverly	Winter Relief Grant		500
St John's Church	Beverly Farms	Winter Relief Grant		500
Emmanuel	Boston	Winter Relief Grant		500
St Peter's	Buzzards Bay	Winter Relief Grant		500
Christ Church	Cambridge	Winter Relief Grant		500
St Christopher's Church	Chatham	Winter Relief Grant		500
Saint Lukes/San Lucas	Chelsea	Winter Relief Grant		500
Church of the Redeemer	Chestnut Hill	Winter Relief Grant		500
All Saints' Church	Danvers	Winter Relief Grant		500

St. Paul's	Dedham	Winter Relief Grant	500
St. John's Church	Duxbury	Winter Relief Grant	500
St. Luke's	Fall River	Winter Relief Grant	500
St. Mark's	Foxboro	Winter Relief Grant	500
St. Andrew's Church	Framingham	Winter Relief Grant	500
St. John's Church	Franklin	Winter Relief Grant	500
St. John's Church	Gloucester	Winter Relief Grant	500
St. James	Groveland	Winter Relief Grant	500
Christ Church	Harwich Port	Winter Relief Grant	500
Trinity	Haverhill	Winter Relief Grant	500
St. John the Evangelist	Hingham	Winter Relief Grant	500
St. John's Church	Hollbrook	Winter Relief Grant	500
St. Michael's Church	Holliston	Winter Relief Grant	500
Parish of Christ Church	Hyde Park	Winter Relief Grant	500
Ascension Memorial Church	Ipswich	Winter Relief Grant	500
St John's	Lowell	Winter Relief Grant	365
St Stephen's	Lynn	Winter Relief Grant	500
St Paul's Church	Lynnfield	Winter Relief Grant	500
St Paul's Church	Malden	Winter Relief Grant	500
St Michaels	Marblehead	Winter Relief Grant	500
Grace Church	Medford	Winter Relief Grant	500
Trinity Church	Melrose	Winter Relief Grant	500
St Andrew's	Methuen	Winter Relief Grant	500
Grace Episcopal Church	N. Attleboro	Winter Relief Grant	500
Christ Church	Needham	Winter Relief Grant	500
St Andrew's	New Bedford	Winter Relief Grant	500
St Mary's Church	Newton	Winter Relief Grant	500
Trinity Church	Newton	Winter Relief Grant	500
Grace Church	Norwood	Winter Relief Grant	500
St. Chrysostom's	Quincy	Winter Relief Grant	500
Christ Church	Quincy	Winter Relief Grant	500
Trinity Church	Randolph	Winter Relief Grant	500
St Mary's Church	Rockport	Winter Relief Grant	500
St. Cyprian's	Roxbury	Winter Relief Grant	500
Christ Church	S. Hamilton	Winter Relief Grant	500
St David's Church	S. Yarmouth	Winter Relief Grant	500
St. Luke's Church	Scituate	Winter Relief Grant	500
St James Church	Somerville	Winter Relief Grant	500
St Mark's Church	Southborough	Winter Relief Grant	500
All Saints' Church	Stoneham	Winter Relief Grant	500
Christ Church	Swansea	Winter Relief Grant	500
St Thomas' Church	Taunton	Winter Relief Grant	500
Trinity Church	Topsfield	Winter Relief Grant	500
All Saints Church	W. Newbury	Winter Relief Grant	500
Christ Church	Waltham	Winter Relief Grant	500
Church of the Good Shepherd	Watertown	Winter Relief Grant	500
St. Mark's Church	Westford	Winter Relief Grant	500
St. Peter's Church	Weston	Winter Relief Grant	500
St John's Church	Westwood	Winter Relief Grant	500
Parish of the Epiphany	Winchester	Winter Relief Grant	500
Church of the Messiah	Woods Hole	Winter Relief Grant	500
Trinity Church	Wrentham	Winter Relief Grant	500
Episcopal Relief and Endowment		Winter Relief Grant	11,700
			<u>45,065</u>
<b>Bishops' Funds</b>			
Clergy Children College Scholarships	22 students		44,700
Society for the Relief of Aged or Disabled Clergy	Served 37 clergy		111,150
Society for the Relief of Widows, Widowers and Orphans of Clergy	Served 38 widows		74,224
		<b>TOTAL GRANTS \$</b>	<b>804,206</b>
<b>Stokes Fund Loans</b>			
85 Loans			2,255,111
	2 Loans	2-8 months in arrears	
	5 Loans	9+ months in arrears	
	78 Loans	Current	

**2016 DIOCESAN STAFF POSITIONS BY AREA**

<b>Position</b>	<b>Incumbent</b>
<b>DEANERIES, CONGREGATIONS &amp; CLERGY</b>	
Canon for Congregations	The Rev. Canon Elizabeth Berman
Senior Consultant for Congregations	Mr. Lawrence Civale
Administrative Assistant	Mr. Andrew Del Pilar
Canon for Ordained Vocations	The Rev. Canon Edie Dolnikowski
Program Director for Mission Hubs	Ms. Jin Min Lee
Director for Transition Ministries	The Rev. Jean Baptiste Ntagengwa
Administrative assistance	Ms. Suzette Phillips
Administrative assistance (Commission on Ministry)	The Ven. Patricia Zifcak
<b>CONGREGATIONAL RESOURCES &amp; TRAINING</b>	
Missioner for Christian Education, Formation and Discipleship	Ms. Amy Cook
Communications Assistant	Ms. Ellen Stuart Kittle
Director of Congregational Resources and Training	The Rev. Karen Montagno
Director of Communications	Ms. Tracy Sukraw
Grants Administrator	Ms. Lauren Zook
Hispanic Missioner	Vacancy
<b>STRATEGIC MINISTRIES</b>	
Executive Director, Life Together	Ms. Kelsey Rice Bogdan
Vicar, St. Stephen's Church, Boston	The Rev. Timothy Crellin
Director of Operations, Life Together	Ms. Kendyll Hillegas
Chaplain, MIT	The Rev. Thea Keith-Lucas
Canon for Asiamerican Ministries	The Rev. Canon Connie Ng Lam
Youth Ministry Administrator	Mr. Sam Lovett
Chaplain, Boston University	The Rev. Cameron Partridge
Director, Youth Ministry	The Rev. H. Mark Smith
Chaplain, Boston College & Northeastern	The Rev. Judith Stuart
Project Director for Global Mission	Ms. Laura Walta
<b>EPISCOPAL AND DIOCESAN SUPPORT</b>	
Bishop	The Rt. Rev. Alan M. Gates
Bishop Suffragan	The Rt. Rev. Gayle E. Harris
Director of Development	Mr. Lynd Matt
Canon to the Ordinary	The Rev. Canon William Parnell
Executive Assistant to Bishop Gates	Ms. Diane Pound
Acting Chief of Staff	The Rev. Samuel Rodman
Administrative Assistant to Bishop Harris	Ms. Marsha Searle
Administrator, Convention and Council	Ms. Laura Simons
Development Assistant	Ms. Casey Zierler

*Continued on page 60*

Continued from page 59

<b>2016 DIOCESAN STAFF POSITIONS BY AREA</b>	
<b>Position</b>	<b>Incumbent</b>
<b>ADMINISTRATIVE SERVICES</b>	
Manager, Human Resources	Ms. Cindy Cushman
Accountant	Ms. Marilyn Govoni
Controller	Mr. Charles Jordan
Coordinator for Congregational Properties	Mr. Stephen Pierce
Manager, Information Technology	Mr. Jamie Reamer
Chief Business Officer and Assistant Treasurer	Mr. Gerry Sullivan
Accountant	Ms. Patricia Superville
Archivist	Vacancy



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