

June-14-2018-Council-Agenda-2	2
DC minutes-04_12_18	4
Financial-Reports-for-April-2018-YTD	8
Real-Estate-Update-06.04.18	24
Fanning-the-Flames-spending-report	25
Report-to-Council-Mission-Resourcing-Committee	27
DWMA-Outreach-Development-Plan-Draft	29
Proposed-Guidlines-for-Memorial-Gardens-August-2017	35
EMWM minutes-04-12-18	37
EMWM Transfer-of-Trustee-Funds-to-Trinity-Chicopee-Cert-of-Vote	38
Letter from Atonement Westfield to Diocesan Council	39

June 14, 2018 Meeting of Diocesan Council  
Diocesan House, Christ Church Cathedral  
2:00- 4:30 PM

**AGENDA**

- 2 PM Opening prayer- *Jose*
- Are you at a crossroad in your life? Coming to one, or coming from one? Find a friendly looking stranger and go outside for a walk around the quadrangle and share your crossroad story with each other. (15-20)
- Bishop's Report (20)
- Resourcing Mission Initiative Update (35) (on portal)
  - a. Update on Resourcing Mission pilot- *Janet*
  - b. Assessment tool
  - c. Case studies (documents will be handed out)
- Congregational Coaches Initiative- *Mac* (35)
  - a. Purpose of initiative
  - b. Recruiting
  - c. Training program
  - d. Structure of working committee

**BUSINESS PORTION (30)**

- Consent Agenda (on portal)
  - a. Approve Minutes from April 12, 2018 Meeting
  - b. Treasurer's Report through April 2018
  - c. Real Estate Update
  - d. FTF update
  - e. Correspondence: Clergy Compensation Equity
- Development Plan update - (on portal)
- 2019 Budget process
- Approve guideline for memorial gardens (on portal)- *Derrick Fetz*

**ADJOURN COUNCIL MEETING**

**EMWM BOARD MEETING (5)**

1. Approve Minutes from April 12, 2018 Meeting
2. Vote to transfer EMWM assets to Trinity, Chicopee
3. Adjourn

Closing Prayer (*Jose*)

#### UPCOMING COUNCIL MEETING SCHEDULE

September 20, 2018, 2:00 - 4:30 PM Diocesan House

November 15, 2018, 2:00 - 4:30 Diocesan House

February 2, 2019, 9 AM - 3 PM Annual Retreat (Location TBD)

April 11, 2019, 2:00 - 4:30 PM Diocesan House

June, 13, 2019, 2:00 - 4:30 PM Diocesan House

#### COUNCIL MEMBERSHIP

Officers and Appointed Members:

The Rt. Rev. Douglas Fisher, President

The Rev. Nancy Webb Stroud, Vice President

The Rev. Mac Murray, Secretary

Mr. Wayne Gass, Treasurer

Mr. Frank Minasian, Trustee Representative

Term of Office Expires:

Convention of 2018 - José Reyes Pérez, John Cheek, Mark Rogers

Convention of 2019 - Janet Zimmerman, Jesse Abell, Janet Young

Convention of 2020 - Heather Blais, Donna Christian, Richard Delorme, Derrick Fetz

**Minutes of Diocesan Council Meeting**  
**Diocese of Western Massachusetts, Springfield MA**  
**April 12, 2018**

**In Attendance:**

*The Rt. Rev. Douglas J. Fisher, President*

*The Rev. Nancy Webb Stroud, Vice President*

*The Rev. Mac Murray, Secretary*

*The Rev. Pamela Mott, Asst. Secretary*

*Ms. Jill Senecal, Asst. Secretary*

*Mr. Steven Abdow, Asst. Treasurer*

*Pioneer Valley Corridor – The Rev. Heather Blais; The Rev. Derrick Fetz; Ms. Janet Walsh Young; Ms. Donna Christian*

*Berkshire Corridor – Mr. John Cheek; The Rev. Dr. Janet Zimmerman*

*Worcester Corridor – Mr. Dick Delorme; The Rev. José Reyes; Mr. Mark Rogers*

*The Rev. Richard Simpson – Executive Staff*

**Excused:**

*Mr. Wayne Gass – Treasurer*

*Mr. Frank Minasian, Trustee Representative*

*The Rev. Jesse W. Abell - Worcester*

**Absent:**

NA

**2:10 pm – Meeting called to order:**

The Rev. Dr. Richard Simpson, Council Chaplain, led opening prayer.

**Bishop's Time:**

All Saint's, Worcester – Title IV

- Finally reached an Accord with Greg Lisby
  - Two year suspension from ministry
  - Resigned as Rector
  - The Rev. José Reyes, supply and retired clergy will cover
  - Hoping to have a new Priest-in-Charge sometime in August

## Gun Violence

- Rising up of our young people regarding public health issues surrounding gun violence
  - Prayed outside of Smith and Wesson
  - Asked for meeting with S & W president – met with silence
  - Will organize another witness
- While at HOB orientation: BUAGV put out a statement opposing NRA leadership
- Supporting youth groups
- Contact with:
  - Pioneer Valley Project
  - Episcopal City Mission in Boston
  - B.P.'s for Jorje
- NPR – some shows suggesting church leaders carry guns to church
  - Do we have a gun policy
    - Part of our Diocesan Safe Church Policy - We are a “Gun Free Zone”

## Sanctuary – Springfield and Northampton

- Mayor Sarno threatened to take away churches tax exempt status
- City Council voted that the City of Springfield/Mayor, cannot interfere with Sanctuary
- Separation of Church and State
- Social Justice Committee
  - Guidelines, Resources and legality
  - Finding trustworthy lawyers
  - Immigration lawyers and information centers
  - Need to come together as a community

## Rival – Pam Mott

- Moving Revival
- Soul and Geographical – Berkshires; Holyoke; Worcester

## Financial Resources – Steve Abdow

- Missions outside of individual parishes
- Sustainable long term
  - Examples: Veterans Ministry; Reconciliation House; Urban Ministry

## **Revival - Pam Mott**

### ***Theme: Rekindling Hope; Sharing Light; Loving Jesus***

- Liaisons from Steering Committee: José Reyes and Tom Callard
- Clergy Chairs: Dave Woessner (Worcester Corridor); Janet Zimmerman (Berkshire Corridor); Cat Munz (Pioneer Valley Corridor)
  - All in process of looking for lay co-chairs
- Reflection/Sharing: What in your life needs rekindling of hope or light or love of Jesus, in your life, in your parishes, in your diocese?

## **Thinking About Our Mission – Doug**

### **Debrief Retreat – Lois Kelly Summary (Appendix A, 1-8)**

Intent of Retreat: Discussion

- Create clear purpose of Council's purpose
- Make Council more meaningful
- Develop structure for Council meetings
- Invite Council members to shape purpose, approach, and format
- "What we want to be the same and different about the Council."
  - Strategic, Operational, Relational, Tactical
- Mission of Council
- Format
- Staying focused
- Evaluating if an agenda item is "Council-worthy"

## **Resourcing Mission Initiative: 2018 Council Priority Project – Heather Blais and Pam Mott**

### **Update on Resourcing Mission pilot and case study– (Appendix B, 1-2)**

- Sustainable and Strategic Ministry Policy – Toronto Grid/Quadrants
  - Static
  - Sustainable
  - Unsustainable
  - Strategic
- Will meet with Dave Robinson, from Toronto, late in April 2018, who will elaborate further on these topics and quadrants
- Case Study – hypothetical scenario
  - Small group discussions
  - Whole group discussion
    - What quadrant would you place this case study and why?
    - Case study missing some information important to determine quadrant
    - Ability to move from one quadrant to another depending on available resources
    - Questions lead to more questions

## **Business – Steve**

### **Consent Agenda**

A vote to approve Consent Agenda, was moved, seconded and passed unanimously

- Minutes of February 3, 2018 DC Meeting (**Appendix C, 1-2**)

- Notes on the 2017 Year End Income Statement of the Administrative Offices of the Diocese of Western Massachusetts **(Appendix D, 1-13)**
- Update on Diocese's Real Estate Portfolio **(Appendix E)**
- Minutes of Special Meeting of Diocesan Council, April 4, 2018 **(Appendix F)**

Episcopal Diocese of Western Massachusetts Diocesan Council – Certificate of Vote **(Appendix G, 1-2)**

[A vote to approve](#) was motioned, seconded and passed unanimously

- Vote to transfer the funds ...[for the benefit of the Diocese which came to the Diocese through the closing of congregations and which are classified as unrestricted into Fund # E03602 known as the Strategic Ministry Reserve Fund; and To authorize any duly elected Officer of the Diocesan Council of The Episcopal Diocese of Western Massachusetts, acting alone, to execute such Authorizations or Certificates as may be required to evidence this Vote](#)

Use of 2017 surplus – TABLED

#### **Announce 2018-19 meeting schedule**

- Discussion regarding new meeting time
  - Thursday, June 14, 2018, 2 – 4:30 PM at Diocesan House
  - Thursday, September 20, 2018, 2 – 4:30 PM at Diocesan House
  - Thursday, November 15, 2018, 2 – 4:30 PM at Diocesan House
  - Saturday, February 2, 2019, 9 AM – 3 PM, Annual Retreat
  - Thursday, April 11, 2019, 2 – 4:30 PM at Diocesan House
  - Thursday, June 13, 2019, 2 – 4:30 PM at Diocesan House

#### **Parking**

Brief discussion regarding Cathedral parking during DC meetings

#### **3:58 pm - Meeting adjourned**

#### **Council Membership:**

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Mr. Frank Minasian, Trustee Representative

#### **Term of Office Expires:**

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## **Notes on the April 2018 YTD Income Statement of the Administrative Offices of the Diocese of Western MA**

### **Revenues**

- Revenues for the year are \$925K against a budget of \$930K, under projection by \$5000.
- Income from the Assessment for common ministry is right on target, as is income from investments.
- Revenue recorded through April for Walking Together is under budget by \$21,000. This money will come from the \$100,000 diocesan match of the Mission Enterprise Zone grant from The Episcopal Church. That revenue will be recorded in June. The money from the TEC grant and the match will run out any day now and we will need to decide where the ~\$40,000 to run the program for the rest of the year will come from. Sources include Bishop's Funds, Fanning the Flames fund, and the Strategic Ministry Reserve. Future funding is dependent on our nascent development efforts.
- We have \$7,700 in Other Income that was not budgeted. This consists of a \$2000 donation, \$2000 in rebates from our Capital One Spark credit cards, and the return of money from a 2016 MDI grant.

### **Bishop's Ministry**

- Two unanticipated expenses are found in Special Diocesan Events. These are expenses that were not on the radar before the 2018 budget was completed. \$2000 has been spent on the Revival in October. We will recoup this money with a \$10,000 grant from TEC. Also, Bishop Cyril from the Diocese of Mampong visited us this spring with his wife and daughter. The Bishop's visit cost \$11,000. We will cover \$7500 of this from our reserve for our partnership with the Ghana Dioceses.
- Another expense that exceeds the budget is for lay health insurance costs for the bishop's assistant. I had budgeted for a single plan but the coverage needed was for a "plus one" plan, which will amount to ~\$5000 additional expense by year end.
- This category is \$16,000 over budget YTD.

### **Mission with Congregations**

- In total, this area of the budget is \$55,000 under projection.
- \$27,500 of that is for Ministry Development Initiative grants that had not been dispersed as of the end of April but were budgeted to have been. The balance will all be dispersed in May and June.
- \$12K of that variance was for Christian Formation spending that was budgeted but not yet spent.
- \$12.5K was for Youth Ministry spending that has not occurred. I need to spread that budget out over 12 months and this should reduce that variance.



### **Leadership Development and Clergy Support**

- This area of the budget is under projection by a mere \$7600.
- Half of that is for seminarian assistance, which hasn't been dispersed yet. The rest is for small variances on several lines.

### **Mission with the Larger Church/World**

- This category is over budget by \$13,000.
- We show spending over budget of \$4000 for the Lambeth Conference expense accrual (to be held in 2020). This is a mistake which needs to be corrected.
- We are under budget on the Global Mission line by \$6000 due to timing. That money will be spent this year.
- There is \$14,000 spending above the budgeted amount on our Veteran's Ministry. This was intentional as we increased our services and will be covered by expected savings on other expense lines and by increased donations.

### **Governance**

- This is a new category with an annual budget of \$200,000. The cost of being a Diocese in The Episcopal Church.
- This area of the budget is under projection by \$14,000.
- \$10,000 of that variance is due to expenses for retiree benefits coming in under budget. We budgeted based on the previous years' experience but expenses are falling due to a smaller pool of clergy receiving benefits and lay retirees having passed away. We stopped offering our retiree benefit to clergy in 2011 after CPG started offering the same benefit.

### **Administration and Finance**

- This area of the budget is over by \$5000 representing ~3% of the budget YTD. No notable variances to report.

### **Agency Function**

- Expenses YTD are \$5000 over budget. The majority of that overage is for payroll expense as we brought on a PT administrative assistance to get trained on payroll.

### **Surplus/Deficit**

We are showing a deficit of \$19,000 for through April against a budgeted deficit of \$51,000. The variances have been explained in the sections above. I anticipate that we will be on budget or under budget by year end.

Submitted by Steve Abdow

**The Episcopal Diocese of Western Massachusetts**  
**Unaudited Activity Statement - Diocesan Ops w/o Audit Aje's**  
**2018 Summary Statement as of April 31, 2018**

01 - Operations Unrestricted

	January 2018	February 2018	March 2018	April 2018	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	Actual YTD % of Annual Budget
<b>REVENUES</b>									
Assessment for Common Ministry	\$93,896	\$93,659	\$93,659	\$93,659	\$374,873	\$372,968	\$1,905	\$1,118,904	
Use of Investment - actual distribution received at end of qtr	\$0	\$0	\$350,250	\$0	\$350,250	\$465,679	(\$115,429)	\$1,397,037	
Other Investment Income	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Program Income	\$1,229	\$11,528	\$3,705	\$15,204	\$31,666	\$48,737	(\$17,071)	\$148,710	
Other Income and Gifts	\$13,362	\$21,067	\$7,339	\$10,177	\$51,945	\$43,240	\$8,705	\$60,720	86%
Interest Income	\$18	\$22	\$14	\$7	\$62	\$200	(\$138)	\$600	10%
<b>TOTAL REVENUES</b>	<b>\$108,506</b>	<b>\$126,276</b>	<b>\$454,966</b>	<b>\$119,047</b>	<b>\$808,796</b>	<b>\$930,824</b>	<b>(\$122,028)</b>	<b>\$2,725,971</b>	<b>30%</b>
**based on 1/12th Annual Budget for Distribution									
	\$0	\$0	\$0	\$116,420	\$116,420				
	<b>\$108,506</b>	<b>\$126,276</b>	<b>\$454,966</b>	<b>\$235,467</b>	<b>\$925,215</b>	<b>\$930,824</b>	<b>(\$5,608)</b>	<b>\$2,725,971</b>	<b>34%</b>
<b>EXPENSES</b>									
<b>BISHOP's MINISTRY</b>	<b>\$42,467</b>	<b>\$35,819</b>	<b>\$40,327</b>	<b>\$51,715</b>	<b>\$170,328</b>	<b>\$154,283</b>	<b>\$16,045</b>	<b>\$452,851</b>	<b>38%</b>
<b>CONGREGATIONAL DEVELOPMENT: for Congregations</b>	<b>\$53,437</b>	<b>\$33,639</b>	<b>\$35,516</b>	<b>\$76,128</b>	<b>\$198,720</b>	<b>\$253,587</b>	<b>(\$54,867)</b>	<b>\$516,057</b>	<b>49%</b>
<b>LEADERSHIP DEVELOPMENT: for Clergy and Lay Leaders</b>	<b>\$17,437</b>	<b>\$16,577</b>	<b>\$23,751</b>	<b>\$23,403</b>	<b>\$81,167</b>	<b>\$88,813</b>	<b>(\$7,645)</b>	<b>\$255,564</b>	<b>32%</b>
<b>MISSION IN THE WORLD</b>	<b>\$61,443</b>	<b>\$56,241</b>	<b>\$69,887</b>	<b>\$61,764</b>	<b>\$249,335</b>	<b>\$236,366</b>	<b>\$12,969</b>	<b>\$697,741</b>	<b>36%</b>
<b>GOVERNANCE</b>	<b>\$10,150</b>	<b>\$9,350</b>	<b>\$11,630</b>	<b>\$9,165</b>	<b>\$40,295</b>	<b>\$54,630</b>	<b>(\$14,335)</b>	<b>\$201,651</b>	<b>20%</b>
<b>ADMINISTRATION &amp; FINANCE: Support of Diocesan Operations</b>	<b>\$34,019</b>	<b>\$38,104</b>	<b>\$35,092</b>	<b>\$33,662</b>	<b>\$140,877</b>	<b>\$135,642</b>	<b>\$5,235</b>	<b>\$424,267</b>	<b>32%</b>
<b>DIOCESAN AGENCY: Agency functions provided to Congregations</b>	<b>\$15,339</b>	<b>\$15,305</b>	<b>\$17,149</b>	<b>\$15,748</b>	<b>\$63,539</b>	<b>\$58,718</b>	<b>\$4,822</b>	<b>\$176,154</b>	<b>36%</b>
<b>TOTAL EXPENSES</b>	<b>\$234,291</b>	<b>\$205,036</b>	<b>\$233,351</b>	<b>\$271,585</b>	<b>\$944,262</b>	<b>\$982,038</b>	<b>(\$37,777)</b>	<b>\$2,724,285</b>	<b>35%</b>
<b>NET SURPLUS/(DEFICIT)</b>	<b>(\$125,785)</b>	<b>(\$78,759)</b>	<b>\$221,616</b>	<b>(\$36,118)</b>	<b>(\$19,046)</b>	<b>(\$51,215)</b>	<b>\$32,168</b>	<b>\$1,686</b>	<b>-1130%</b>

The Episcopal Diocese of Western Massachusetts  
Unaudited Activity Statement - Diocesan Ops w/o Audit Aje's  
YTD APR 2018 LEVEL 3 (Ops-Agency only) (Summary 2018 VCO)

		JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
01 - Operations Unrestricted										
REVENUES										
Assessment for Common Ministry										
01-4000-99	Common Ministry - Parishes and Missions									
999 - Default		\$93,896.00	\$93,659.00	\$93,659.00	\$93,659.00	\$374,873.00	\$372,968.00	\$1,905.00	\$1,118,904.00	33.5%
Total Assessment for Common Ministry		\$93,896.00	\$93,659.00	\$93,659.00	\$93,659.00	\$374,873.00	\$372,968.00	\$1,905.00	\$1,118,904.00	33.5%
Use of Investment - Trustees										
01-5100-99	Use of Investment - Spending Rule									
999 - Default		\$0.00	\$0.00	\$350,250.06	\$0.00	\$350,250.06	\$465,679.00	(\$115,428.94)	\$1,397,037.00	25.1%
Total Use of Investment - Trustees		\$0.00	\$0.00	\$350,250.06	\$0.00	\$350,250.06	\$465,679.00	(\$115,428.94)	\$1,397,037.00	25.1%
Program Income										
01-4500-20	Program Income									
270 - Communications		\$60.00	\$30.00	\$0.00	\$10.00	\$100.00	\$0.00	\$100.00	\$0.00	0.0%
01-4500-25	Program Income									
252 - Diocesan Convention		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$18,000.00	0.0%
01-4500-30	Program Income									
315 - Youth Ministry		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,000.00	(\$8,000.00)	\$8,000.00	0.0%
324 - Christian Formation Missione		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%
326 - Safe Church Training & Preve		\$0.00	\$555.00	\$25.00	\$0.00	\$580.00	\$1,333.32	(\$753.32)	\$4,000.00	14.5%
355 - Hispanic Ministries		\$0.00	\$0.00	\$0.00	\$5,500.00	\$5,500.00	\$0.00	\$5,500.00	\$0.00	0.0%
01-4500-40	Program Income									
103 - Parish Leadership Developmen		\$0.00	\$0.00	\$2,865.00	\$0.00	\$2,865.00	\$3,000.00	(\$135.00)	\$3,000.00	95.5%
124 - Clergy Conferences		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,500.00	0.0%
130 - Diaconate Formation		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	(\$500.00)	\$1,500.00	0.0%
01-4500-50	Program Income									
050 - Veteran's Ministry		\$400.00	\$9,650.00	\$471.00	\$9,300.00	\$19,821.00	\$12,000.00	\$7,821.00	\$36,000.00	55.1%
059 - Walking Together Ministry		\$768.84	\$1,293.34	\$343.84	\$393.84	\$2,799.86	\$23,903.32	(\$21,103.46)	\$71,710.00	3.9%
Total Program Income		\$1,228.84	\$11,528.34	\$3,704.84	\$15,203.84	\$31,665.86	\$48,736.64	(\$17,070.78)	\$148,710.00	21.3%

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Other Income and Gifts										
01-4100-99	Bequests & Estate Gifts									
999 - Default		\$0.00	\$2,042.64	\$0.00	\$0.00	\$2,042.64	\$0.00	\$2,042.64	\$0.00	0.0%
01-4200-50	Other Income and Gifts									
037 - Creation Care		\$0.00	\$4,500.00	\$0.00	\$4,500.00	\$9,000.00	\$9,000.00	\$0.00	\$18,000.00	50.0%
050 - Veteran's Ministry		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%
01-4200-99	Other Income and Gifts									
999 - Default		\$2,250.00	\$3,412.00	\$35.00	\$2,005.43	\$7,702.43	\$0.00	\$7,702.43	\$0.00	0.0%
01-4600-30	Other Grants									
355 - Hispanic Ministries		\$10,312.35	\$10,312.35	\$6,503.88	\$2,871.42	\$30,000.00	\$30,000.00	\$0.00	\$30,000.00	100.0%
01-4700-10	Accounting Services									
499 - Finance Personnel Expense		\$80.00	\$80.00	\$80.00	\$80.00	\$320.00	\$435.64	(\$115.64)	\$1,307.00	24.5%
01-4700-30	Accounting Services									
399 - CongDev Canon Personnel		\$360.00	\$360.00	\$360.00	\$360.00	\$1,440.00	\$1,913.32	(\$473.32)	\$5,740.00	25.1%
01-4700-40	Accounting Services									
199 - LeadershipDev Canon Personne		\$360.00	\$360.00	\$360.00	\$360.00	\$1,440.00	\$1,891.00	(\$451.00)	\$5,673.00	25.4%
Total Other Income and Gifts		\$13,362.35	\$21,066.99	\$7,338.88	\$10,176.85	\$51,945.07	\$43,239.96	\$8,705.11	\$60,720.00	85.5%
Interest Income										
01-4300-99	Interest Income									
999 - Default		\$18.49	\$22.14	\$13.62	\$7.40	\$61.65	\$200.00	(\$138.35)	\$600.00	10.3%
Total Interest Income		\$18.49	\$22.14	\$13.62	\$7.40	\$61.65	\$200.00	(\$138.35)	\$600.00	10.3%
TOTAL REVENUES		\$108,505.68	\$126,276.47	\$454,966.40	\$119,047.09	\$808,795.64	\$930,823.60	(\$122,027.96)	\$2,725,971.00	29.7%
EXPENSES										
BISHOP'S MINISTRY: Programs										
PROGRAMS										
203 - Special Clergy Gatherings		\$0.00	\$0.00	\$627.00	\$0.00	\$627.00	\$0.00	\$627.00	\$0.00	0.0%

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225 - Special Diocesan Events	\$429.78	\$0.00	\$2,303.15	\$10,421.80	\$13,154.73	\$0.00	\$13,154.73	\$0.00	0.0%
227 - Social Justice	\$0.00	\$0.00	\$780.17	\$799.43	\$1,579.60	\$1,249.92	\$329.68	\$3,750.00	42.1%
270 - Communications	\$14,091.74	\$8,101.32	\$8,312.26	\$10,382.20	\$40,887.52	\$40,347.56	\$539.96	\$117,043.00	34.9%
275 - Bishop Wanderings	\$0.00	\$0.00	\$2.00	\$0.00	\$2.00	\$999.96	(\$997.96)	\$3,000.00	0.1%
Total PROGRAMS	\$14,521.52	\$8,101.32	\$12,024.58	\$21,603.43	\$56,250.85	\$42,597.44	\$13,653.41	\$123,793.00	45.4%
PERSONNEL EXPENSES									
291 - Bishop Business Expenses	\$2,301.76	\$1,249.39	\$2,566.27	\$4,316.38	\$10,433.80	\$12,032.52	(\$1,598.72)	\$30,098.00	34.7%
299 - Bishop Personnel Expenses	\$25,643.69	\$26,467.97	\$25,735.68	\$25,795.68	\$103,643.02	\$99,653.20	\$3,989.82	\$298,960.00	34.7%
Total PERSONNEL EXPENSES	\$27,945.45	\$27,717.36	\$28,301.95	\$30,112.06	\$114,076.82	\$111,685.72	\$2,391.10	\$329,058.00	34.7%
Total BISHOP'S MINISTRY: Programs	\$42,466.97	\$35,818.68	\$40,326.53	\$51,715.49	\$170,327.67	\$154,283.16	\$16,044.51	\$452,851.00	37.6%
CONGREGATIONAL DEVELOPMENT: Mission with Congregations									
GRANTS and SCHOLARSHIPS									
302 - Clergy Children Educationa	\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00	\$2,000.00	\$1,000.00	\$6,000.00	50.0%
312 - Deanery Programs	\$0.00	\$0.00	\$0.00	\$256.85	\$256.85	\$866.64	(\$609.79)	\$2,600.00	9.9%
313 - Ministry Development Initiat	\$500.00	\$0.00	\$0.00	\$51,975.00	\$52,475.00	\$80,000.00	(\$27,525.00)	\$80,000.00	65.6%
314 - Bement/Waterfield Edu. Grant	\$16,140.00	\$1,890.00	\$430.00	\$0.00	\$18,460.00	\$19,318.28	(\$858.28)	\$42,500.00	43.4%
322 - Continuing Education Grant	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,333.32	(\$1,333.32)	\$4,000.00	0.0%
328 - Sabbatical Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.00	0.0%
Total GRANTS and SCHOLARSHIPS	\$19,640.00	\$1,890.00	\$430.00	\$52,231.85	\$74,191.85	\$103,518.24	(\$29,326.39)	\$140,100.00	53.0%
OPERATIONAL EXPENSES									
301 - Spec. Assist. Congreg.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,666.64	(\$1,666.64)	\$5,000.00	0.0%
315 - Youth Ministry	\$1,589.46	\$1,589.46	\$1,589.46	\$2,089.46	\$6,857.84	\$19,311.20	(\$12,453.36)	\$32,934.00	20.8%
320 - Stewardship	\$1,250.00	\$0.00	\$19.00	\$0.00	\$1,269.00	\$0.00	\$1,269.00	\$14,700.00	8.6%
324 - Christian Formation Missione	\$2,368.10	\$2,453.59	\$3,538.33	\$2,654.69	\$11,014.71	\$22,586.52	(\$11,571.81)	\$65,760.00	16.7%
326 - Safe Church Training & Preve	\$783.85	\$0.00	\$1,089.49	\$0.00	\$1,873.34	\$1,483.28	\$390.06	\$4,450.00	42.1%
329 - Transition Ministry	\$300.00	\$260.91	\$1,498.74	\$168.41	\$2,228.06	\$2,400.00	(\$171.94)	\$4,750.00	46.9%
355 - Hispanic Ministries	\$10,312.35	\$10,312.35	\$10,312.35	\$668.45	\$31,605.50	\$33,999.96	(\$2,394.46)	\$42,000.00	75.3%

The Episcopal Diocese of Western Massachusetts

Unaudited Activity Statement - Diocesan Ops w/o Audit Aje's

YTD APR 2018 LEVEL 3 (Ops-Agency only) (Summary 2018 VCO)

	JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
TOTAL CONGREGATIONAL EXPENSES	\$16,603.76	\$14,616.31	\$18,047.37	\$5,581.01	\$54,848.45	\$81,447.60	(\$26,599.15)	\$169,594.00	32.3%
PERSONNEL EXPENSES									
391 - CongDev Canon Business Ex	\$531.16	\$470.50	\$375.93	\$1,652.14	\$3,029.73	\$3,197.64	(\$167.91)	\$10,093.00	30.0%
399 - CongDev Canon Personnel	\$16,662.52	\$16,662.53	\$16,662.53	\$16,662.53	\$66,650.11	\$65,423.16	\$1,226.95	\$196,270.00	34.0%
TOTAL PERSONNEL EXPENSES	\$17,193.68	\$17,133.03	\$17,038.46	\$18,314.67	\$69,679.84	\$68,620.80	\$1,059.04	\$206,363.00	33.8%
TOTAL CONGREGATIONAL DEV: Mission with Congregations	\$53,437.44	\$33,639.34	\$35,515.83	\$76,127.53	\$198,720.14	\$253,586.64	(\$54,866.50)	\$516,057.00	38.5%
LEADERSHIP DEVELOPMENT for Clergy and Lay									
OPERATIONAL EXPENSES									
103 - Parish Leadership Developmen	\$0.00	\$0.00	\$6,506.49	\$224.15	\$6,730.64	\$9,950.00	(\$3,219.36)	\$9,950.00	67.6%
120 - Comm. on Ministry	\$1,000.00	\$13.00	\$0.00	\$3.88	\$1,016.88	\$1,499.96	(\$483.08)	\$4,500.00	22.6%
121 - Seminarian Assistance	\$452.00	\$0.00	\$0.00	\$0.00	\$452.00	\$4,166.64	(\$3,714.64)	\$12,500.00	3.6%
124 - Clergy Conferences	\$0.00	\$233.23	\$838.34	\$0.00	\$1,071.57	\$466.64	\$604.93	\$20,900.00	5.1%
127 - Fresh Start Program	\$0.00	\$271.38	\$199.04	\$33.79	\$504.21	\$1,975.00	(\$1,470.79)	\$3,950.00	12.8%
128 - Strategic Leadership Dvlpmn	\$0.00	\$0.00	\$0.00	\$1,279.43	\$1,279.43	\$2,166.64	(\$887.21)	\$6,500.00	19.7%
129 - Education for Ministry	\$300.00	\$0.00	\$0.00	\$0.00	\$300.00	\$1,466.64	(\$1,166.64)	\$4,900.00	6.1%
130 - Diaconate Formation	\$0.00	\$825.60	\$0.00	\$0.00	\$825.60	\$1,200.00	(\$374.40)	\$3,600.00	22.9%
160 - David Allen Seminars	\$0.00	\$0.00	\$0.00	\$2,119.45	\$2,119.45	\$0.00	\$2,119.45	\$0.00	0.0%
TOTAL OPERATIONAL EXPENSES	\$1,752.00	\$1,343.21	\$7,543.87	\$3,660.70	\$14,299.78	\$22,891.52	(\$8,591.74)	\$66,800.00	21.4%
PERSONNEL EXPENSES									
191 - LeadershipDev Canon Busines	\$702.05	\$251.71	\$1,224.37	\$4,759.33	\$6,937.46	\$6,699.60	\$237.86	\$11,099.00	62.5%
199 - LeadershipDev Canon Personne	\$14,982.50	\$14,982.51	\$14,982.51	\$14,982.51	\$59,930.03	\$59,221.48	\$708.55	\$177,665.00	33.7%
TOTAL PERSONNEL EXPENSES	\$15,684.55	\$15,234.22	\$16,206.88	\$19,741.84	\$66,867.49	\$65,921.08	\$946.41	\$188,764.00	35.4%
TOTAL LEADERSHIP DEVELOPMENT	\$17,436.55	\$16,577.43	\$23,750.75	\$23,402.54	\$81,167.27	\$88,812.60	(\$7,645.33)	\$255,564.00	31.8%
MISSION IN THE WORLD									
OPERATIONAL EXPENSES									

The Episcopal Diocese of Western Massachusetts  
Unaudited Activity Statement - Diocesan Ops w/o Audit Aje's  
YTD APR 2018 LEVEL 3 (Ops-Agency only) (Summary 2018 VCO)

	JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
001 - Nat'l Church Apportionmen	\$28,569.25	\$28,569.25	\$28,569.25	\$28,569.25	\$114,277.00	\$114,277.00	\$0.00	\$342,831.00	33.3%
011 - Lambeth Conference	\$0.00	\$0.00	\$3,750.00	\$1,250.00	\$5,000.00	\$666.64	\$4,333.36	\$2,000.00	250.0%
012 - Province of N.E.	\$812.42	\$812.42	\$812.42	\$812.42	\$3,249.68	\$3,249.64	\$0.04	\$9,749.00	33.3%
020 - Ecumenical Officer	\$0.00	\$0.00	\$0.00	\$1,669.03	\$1,669.03	\$2,250.00	(\$580.97)	\$2,250.00	74.2%
021 - Interfaith Council	\$300.00	\$0.00	\$0.00	\$50.00	\$350.00	\$300.00	\$50.00	\$300.00	116.7%
026 - Mass Council of Churches	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$5,000.00	\$5,000.00	\$0.00	\$15,000.00	33.3%
028 - Berkshire Organizing Projec	\$625.00	\$0.00	\$0.00	\$625.00	\$1,250.00	\$1,250.00	\$0.00	\$2,500.00	50.0%
029 - Cathedral of The Beloved	\$11,569.73	\$6,569.73	\$6,569.72	\$6,569.73	\$31,278.91	\$32,335.32	(\$1,056.41)	\$87,279.00	35.8%
030 - Global Mission	\$500.00	\$0.00	\$0.00	\$1,540.28	\$2,040.28	\$8,333.32	(\$6,293.04)	\$25,000.00	8.2%
033 - Anglican Communion Partner	\$208.37	\$208.37	\$208.37	\$208.37	\$833.48	\$833.32	\$0.16	\$2,500.00	33.3%
035 - Millenium Development Goal	\$0.00	\$0.00	\$4,718.00	\$0.00	\$4,718.00	\$4,718.00	\$0.00	\$18,872.00	25.0%
037 - Creation Care	\$3,244.65	\$3,285.54	\$3,085.04	\$2,637.78	\$12,253.01	\$11,762.64	\$490.37	\$35,288.00	34.7%
050 - Veteran's Ministry	\$8,247.60	\$9,566.12	\$13,756.84	\$9,690.32	\$41,260.88	\$27,487.56	\$13,773.32	\$82,463.00	50.0%
059 - Walking Together Ministry	\$6,116.08	\$5,979.51	\$7,167.46	\$6,891.89	\$26,154.94	\$23,902.80	\$2,252.14	\$71,709.00	36.5%
Total OPERATIONAL EXPENSES	\$61,443.10	\$56,240.94	\$69,887.10	\$61,764.07	\$249,335.21	\$236,366.24	\$12,968.97	\$697,741.00	35.7%
Total MISSION IN THE WORLD	\$61,443.10	\$56,240.94	\$69,887.10	\$61,764.07	\$249,335.21	\$236,366.24	\$12,968.97	\$697,741.00	35.7%
GOVERNANCE									
OPERATIONAL EXPENSES									
250 - Chancellor's Expenses	\$3,579.57	\$3,500.00	\$3,500.00	\$3,500.00	\$14,079.57	\$17,250.00	(\$3,170.43)	\$45,250.00	31.1%
252 - Diocesan Convention	\$640.62	\$640.62	\$640.62	\$640.62	\$2,562.48	\$3,154.96	(\$592.48)	\$42,465.00	6.0%
253 - Diocesan Council	\$1,250.00	\$164.86	\$160.00	\$17.66	\$1,592.52	\$546.64	\$1,045.88	\$1,400.00	113.8%
254 - General Convention	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	0.0%
255 - House of Bishops	\$0.00	\$100.00	\$2,135.37	\$0.00	\$2,235.37	\$3,500.00	(\$1,264.63)	\$7,000.00	31.9%
256 - Retired Clergy Benefits	\$2,401.25	\$2,666.25	\$2,666.25	\$2,666.25	\$10,400.00	\$12,610.64	(\$2,210.64)	\$37,832.00	27.5%
257 - Retired Lay Benefits	\$2,278.45	\$2,278.45	\$2,278.45	\$2,278.45	\$9,113.80	\$16,734.64	(\$7,620.84)	\$50,204.00	18.2%
258 - Standing Committee	\$0.00	\$0.00	\$16.46	\$0.00	\$16.46	\$166.64	(\$150.18)	\$500.00	3.3%
259 - Title IV Disciplinary Committe	\$0.00	\$0.00	\$233.00	\$62.06	\$295.06	\$666.64	(\$371.58)	\$2,000.00	14.8%
TOTAL OPERATIONAL EXPENSES	\$10,149.89	\$9,350.18	\$11,630.15	\$9,165.04	\$40,295.26	\$54,630.16	(\$14,334.90)	\$201,651.00	20.0%

The Episcopal Diocese of Western Massachusetts  
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YTD APR 2018 LEVEL 3 (Ops-Agency only) (Summary 2018 VCO)

	JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
TOTAL GOVERNANCE	\$10,149.89	\$9,350.18	\$11,630.15	\$9,165.04	\$40,295.26	\$54,630.16	(\$14,334.90)	\$201,651.00	20.0%
DIOCESAN FINANCE & ADMINISTRATION EXPENSES									
ARCHIVE EXPENSES									
450 - Archives	\$570.08	\$525.08	\$525.06	\$525.06	\$2,145.28	\$2,363.52	(\$218.24)	\$6,931.00	31.0%
Total ARCHIVE EXPENSES	\$570.08	\$525.08	\$525.06	\$525.06	\$2,145.28	\$2,363.52	(\$218.24)	\$6,931.00	31.0%
OPERATIONAL EXPENSES									
400 - General Operation Expense	\$2,105.80	\$5,628.33	\$1,977.05	\$1,708.32	\$11,419.50	\$10,209.84	\$1,209.66	\$30,630.00	37.3%
420 - General Property Expenses	\$9,085.87	\$10,575.51	\$11,026.55	\$9,320.59	\$40,008.52	\$37,300.56	\$2,707.96	\$111,902.00	35.8%
430 - Financial Management Expense	\$1,853.32	\$1,040.54	\$1,097.92	\$1,100.02	\$5,091.80	\$3,366.64	\$1,725.16	\$10,100.00	50.4%
440 - Accounting Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19,500.00	0.0%
TOTAL OPERATIONAL EXPENSES	\$13,044.99	\$17,244.38	\$14,101.52	\$12,128.93	\$56,519.82	\$50,877.04	\$5,642.78	\$172,132.00	32.8%
PERSONNEL EXPENSES									
491 - Finance Business Expenses	\$870.47	\$587.64	\$692.31	\$695.73	\$2,846.15	\$3,864.88	(\$1,018.73)	\$9,595.00	29.7%
499 - Finance Personnel Expense	\$19,533.02	\$19,747.28	\$19,772.83	\$20,312.37	\$79,365.50	\$78,536.28	\$829.22	\$235,609.00	33.7%
TOTAL PERSONNEL EXPENSES	\$20,403.49	\$20,334.92	\$20,465.14	\$21,008.10	\$82,211.65	\$82,401.16	(\$189.51)	\$245,204.00	33.5%
TOTAL DIOCESAN FINANCE & ADMINISTRATION EXPENSES	\$34,018.56	\$38,104.38	\$35,091.72	\$33,662.09	\$140,876.75	\$135,641.72	\$5,235.03	\$424,267.00	33.2%
DIOCESAN AGENCY EXPENSES FOR CONGREGATION SUPPORT									
OPERATIONAL EXPENSES									
700 - Agency Administrative Cost	\$1,147.70	\$908.19	\$2,596.65	\$808.85	\$5,461.39	\$3,404.60	\$2,056.79	\$10,214.00	53.5%
Total OPERATIONAL EXPENSES	\$1,147.70	\$908.19	\$2,596.65	\$808.85	\$5,461.39	\$3,404.60	\$2,056.79	\$10,214.00	53.5%
PERSONNEL EXPENSES									
791 - Agency Business Expenses	\$0.00	\$0.00	\$130.00	\$0.00	\$130.00	\$833.20	(\$703.20)	\$2,500.00	5.2%
799 - Agency Personnel Expenses	\$14,190.82	\$14,396.38	\$14,421.94	\$14,938.90	\$57,948.04	\$54,479.92	\$3,468.12	\$163,440.00	35.5%
Total PERSONNEL EXPENSES	\$14,190.82	\$14,396.38	\$14,551.94	\$14,938.90	\$58,078.04	\$55,313.12	\$2,764.92	\$165,940.00	35.0%



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	JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
Total DIOCESAN AGENCY EXPENSES FOR CONGREGATION SUPPORT	\$15,338.52	\$15,304.57	\$17,148.59	\$15,747.75	\$63,539.43	\$58,717.72	\$4,821.71	\$176,154.00	36.1%
TOTAL EXPENSES	\$234,291.03	\$205,035.52	\$233,350.67	\$271,584.51	\$944,261.73	\$982,038.24	(\$37,776.51)	\$2,724,285.00	34.7%
NET SURPLUS/(DEFICIT)									
001 - Nat'l Church Apportionment	(\$28,569.25)	(\$28,569.25)	(\$28,569.25)	(\$28,569.25)	(\$114,277.00)	(\$114,277.00)	\$0.00	(\$342,831.00)	33.3%
011 - Lambeth Conference	\$0.00	\$0.00	(\$3,750.00)	(\$1,250.00)	(\$5,000.00)	(\$666.64)	(\$4,333.36)	(\$2,000.00)	250.0%
012 - Province of N.E.	(\$812.42)	(\$812.42)	(\$812.42)	(\$812.42)	(\$3,249.68)	(\$3,249.64)	(\$0.04)	(\$9,749.00)	33.3%
020 - Ecumenical Officer	\$0.00	\$0.00	\$0.00	(\$1,669.03)	(\$1,669.03)	(\$2,250.00)	\$580.97	(\$2,250.00)	74.2%
021 - Interfaith Council	(\$300.00)	\$0.00	\$0.00	(\$50.00)	(\$350.00)	(\$300.00)	(\$50.00)	(\$300.00)	116.7%
026 - Mass Council of Churches	(\$1,250.00)	(\$1,250.00)	(\$1,250.00)	(\$1,250.00)	(\$5,000.00)	(\$5,000.00)	\$0.00	(\$15,000.00)	33.3%
028 - Berkshire Organizing Project	(\$625.00)	\$0.00	\$0.00	(\$625.00)	(\$1,250.00)	(\$1,250.00)	\$0.00	(\$2,500.00)	50.0%
029 - Cathedral of The Beloved	(\$11,569.73)	(\$6,569.73)	(\$6,569.72)	(\$6,569.73)	(\$31,278.91)	(\$32,335.32)	\$1,056.41	(\$87,279.00)	35.8%
030 - Global Mission	(\$500.00)	\$0.00	\$0.00	(\$1,540.28)	(\$2,040.28)	(\$8,333.32)	\$6,293.04	(\$25,000.00)	8.2%
033 - Anglican Communion Partners	(\$208.37)	(\$208.37)	(\$208.37)	(\$208.37)	(\$833.48)	(\$833.32)	(\$0.16)	(\$2,500.00)	33.3%
035 - Millenium Development Goals	\$0.00	\$0.00	(\$4,718.00)	\$0.00	(\$4,718.00)	(\$4,718.00)	\$0.00	(\$18,872.00)	25.0%
037 - Creation Care	(\$3,244.65)	\$1,214.46	(\$3,085.04)	\$1,862.22	(\$3,253.01)	(\$2,762.64)	(\$490.37)	(\$17,288.00)	18.8%
050 - Veteran's Ministry	(\$7,847.60)	\$83.88	(\$13,285.84)	(\$390.32)	(\$21,439.88)	(\$15,487.56)	(\$5,952.32)	(\$46,463.00)	46.1%
059 - Walking Together Ministry	(\$5,347.24)	(\$4,686.17)	(\$6,823.62)	(\$6,498.05)	(\$23,355.08)	\$0.52	(\$23,355.60)	\$1.00	(2,335,508.0)%
103 - Parish Leadership Development Da	\$0.00	\$0.00	(\$3,641.49)	(\$224.15)	(\$3,865.64)	(\$6,950.00)	\$3,084.36	(\$6,950.00)	55.6%
120 - Comm. on Ministry	(\$1,000.00)	(\$13.00)	\$0.00	(\$3.88)	(\$1,016.88)	(\$1,499.96)	\$483.08	(\$4,500.00)	22.6%
121 - Seminarian Assistance	(\$452.00)	\$0.00	\$0.00	\$0.00	(\$452.00)	(\$4,166.64)	\$3,714.64	(\$12,500.00)	3.6%
124 - Clergy Conferences	\$0.00	(\$233.23)	(\$838.34)	\$0.00	(\$1,071.57)	(\$466.64)	(\$604.93)	(\$14,400.00)	7.4%
127 - Fresh Start Program	\$0.00	(\$271.38)	(\$199.04)	(\$33.79)	(\$504.21)	(\$1,975.00)	\$1,470.79	(\$3,950.00)	12.8%
128 - Strategic Leadership Dvlpmnt	\$0.00	\$0.00	\$0.00	(\$1,279.43)	(\$1,279.43)	(\$2,166.64)	\$887.21	(\$6,500.00)	19.7%
129 - Education for Ministry	(\$300.00)	\$0.00	\$0.00	\$0.00	(\$300.00)	(\$1,466.64)	\$1,166.64	(\$4,900.00)	6.1%
130 - Diaconate Formation	\$0.00	(\$825.60)	\$0.00	\$0.00	(\$825.60)	(\$700.00)	(\$125.60)	(\$2,100.00)	39.3%
160 - David Allen Seminars	\$0.00	\$0.00	\$0.00	(\$2,119.45)	(\$2,119.45)	\$0.00	(\$2,119.45)	\$0.00	0.0%
191 - LeadershipDev Canon Business Exp	(\$702.05)	(\$251.71)	(\$1,224.37)	(\$4,759.33)	(\$6,937.46)	(\$6,699.60)	(\$237.86)	(\$11,099.00)	62.5%
199 - LeadershipDev Canon Personnel E	(\$14,622.50)	(\$14,622.51)	(\$14,622.51)	(\$14,622.51)	(\$58,490.03)	(\$57,330.48)	(\$1,159.55)	(\$171,992.00)	34.0%

The Episcopal Diocese of Western Massachusetts  
Unaudited Activity Statement - Diocesan Ops w/o Audit Aje's  
YTD APR 2018 LEVEL 3 (Ops-Agency only) (Summary 2018 VCO)

	JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
203 - Special Clergy Gatherings	\$0.00	\$0.00	(\$627.00)	\$0.00	(\$627.00)	\$0.00	(\$627.00)	\$0.00	0.0%
225 - Special Diocesan Events	(\$429.78)	\$0.00	(\$2,303.15)	(\$10,421.80)	(\$13,154.73)	\$0.00	(\$13,154.73)	\$0.00	0.0%
227 - Social Justice	\$0.00	\$0.00	(\$780.17)	(\$799.43)	(\$1,579.60)	(\$1,249.92)	(\$329.68)	(\$3,750.00)	42.1%
250 - Chancellor's Expenses	(\$3,579.57)	(\$3,500.00)	(\$3,500.00)	(\$3,500.00)	(\$14,079.57)	(\$17,250.00)	\$3,170.43	(\$45,250.00)	31.1%
252 - Diocesan Convention	(\$640.62)	(\$640.62)	(\$640.62)	(\$640.62)	(\$2,562.48)	(\$3,154.96)	\$592.48	(\$24,465.00)	10.5%
253 - Diocesan Council	(\$1,250.00)	(\$164.86)	(\$160.00)	(\$17.66)	(\$1,592.52)	(\$546.64)	(\$1,045.88)	(\$1,400.00)	113.8%
254 - General Convention	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$15,000.00)	0.0%
255 - House of Bishops	\$0.00	(\$100.00)	(\$2,135.37)	\$0.00	(\$2,235.37)	(\$3,500.00)	\$1,264.63	(\$7,000.00)	31.9%
256 - Retired Clergy Benefits	(\$2,401.25)	(\$2,666.25)	(\$2,666.25)	(\$2,666.25)	(\$10,400.00)	(\$12,610.64)	\$2,210.64	(\$37,832.00)	27.5%
257 - Retired Lay Benefits	(\$2,278.45)	(\$2,278.45)	(\$2,278.45)	(\$2,278.45)	(\$9,113.80)	(\$16,734.64)	\$7,620.84	(\$50,204.00)	18.2%
258 - Standing Committee	\$0.00	\$0.00	(\$16.46)	\$0.00	(\$16.46)	(\$166.64)	\$150.18	(\$500.00)	3.3%
259 - Title IV Disciplinary Committee	\$0.00	\$0.00	(\$233.00)	(\$62.06)	(\$295.06)	(\$666.64)	\$371.58	(\$2,000.00)	14.8%
270 - Communications	(\$14,031.74)	(\$8,071.32)	(\$8,312.26)	(\$10,372.20)	(\$40,787.52)	(\$40,347.56)	(\$439.96)	(\$117,043.00)	34.8%
275 - Bishop Wanderings	\$0.00	\$0.00	(\$2.00)	\$0.00	(\$2.00)	(\$999.96)	\$997.96	(\$3,000.00)	0.1%
291 - Bishop Business Expenses	(\$2,301.76)	(\$1,249.39)	(\$2,566.27)	(\$4,316.38)	(\$10,433.80)	(\$12,032.52)	\$1,598.72	(\$30,098.00)	34.7%
299 - Bishop Personnel Expenses	(\$25,643.69)	(\$26,467.97)	(\$25,735.68)	(\$25,795.68)	(\$103,643.02)	(\$99,653.20)	(\$3,989.82)	(\$298,960.00)	34.7%
301 - Spec. Assist. Congreg.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$1,666.64)	\$1,666.64	(\$5,000.00)	0.0%
302 - Clergy Children Educational Grant	(\$3,000.00)	\$0.00	\$0.00	\$0.00	(\$3,000.00)	(\$2,000.00)	(\$1,000.00)	(\$6,000.00)	50.0%
312 - Deanery Programs	\$0.00	\$0.00	\$0.00	(\$256.85)	(\$256.85)	(\$866.64)	\$609.79	(\$2,600.00)	9.9%
313 - Ministry Development Initiatives (	(\$500.00)	\$0.00	\$0.00	(\$51,975.00)	(\$52,475.00)	(\$80,000.00)	\$27,525.00	(\$80,000.00)	65.6%
314 - Bement/Waterfield Edu. Grants	(\$16,140.00)	(\$1,890.00)	(\$430.00)	\$0.00	(\$18,460.00)	(\$19,318.28)	\$858.28	(\$42,500.00)	43.4%
315 - Youth Ministry	(\$1,589.46)	(\$1,589.46)	(\$1,589.46)	(\$2,089.46)	(\$6,857.84)	(\$11,311.20)	\$4,453.36	(\$24,934.00)	27.5%
320 - Stewardship	(\$1,250.00)	\$0.00	(\$19.00)	\$0.00	(\$1,269.00)	\$0.00	(\$1,269.00)	(\$14,700.00)	8.6%
322 - Continuing Education Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$1,333.32)	\$1,333.32	(\$4,000.00)	0.0%
324 - Christian Formation Missioner	(\$2,368.10)	(\$2,453.59)	(\$3,538.33)	(\$2,654.69)	(\$11,014.71)	(\$22,586.52)	\$11,571.81	(\$65,760.00)	16.7%
326 - Safe Church Training & Preventio	(\$783.85)	\$555.00	(\$1,064.49)	\$0.00	(\$1,293.34)	(\$149.96)	(\$1,143.38)	(\$450.00)	287.4%
328 - Sabbatical Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$5,000.00)	0.0%
329 - Transition Ministry	(\$300.00)	(\$260.91)	(\$1,498.74)	(\$168.41)	(\$2,228.06)	(\$2,400.00)	\$171.94	(\$4,750.00)	46.9%
355 - Hispanic Ministries	\$0.00	\$0.00	(\$3,808.47)	\$7,702.97	\$3,894.50	(\$3,999.96)	\$7,894.46	(\$12,000.00)	(32.5)%
391 - CongDev Canon Business Expense	(\$531.16)	(\$470.50)	(\$375.93)	(\$1,652.14)	(\$3,029.73)	(\$3,197.64)	\$167.91	(\$10,093.00)	30.0%
399 - CongDev Canon Personnel Expense	(\$16,302.52)	(\$16,302.53)	(\$16,302.53)	(\$16,302.53)	(\$65,210.11)	(\$63,509.84)	(\$1,700.27)	(\$190,530.00)	34.2%

The Episcopal Diocese of Western Massachusetts  
Unaudited Activity Statement - Diocesan Ops w/o Audit Aje's  
YTD APR 2018 LEVEL 3 (Ops-Agency only) (Summary 2018 VCO)

	JANUARY	FEBRUARY	MARCH	APRIL	YTD Actual as of 4/30/2018	2018 Budget as of 4/30/2018	Variance YTD to Budget YTD	2018 Annual Budget	% of ANNUAL BUDGET USED
400 - General Operation Expenses	(\$2,105.80)	(\$5,628.33)	(\$1,977.05)	(\$1,708.32)	(\$11,419.50)	(\$10,209.84)	(\$1,209.66)	(\$30,630.00)	37.3%
420 - General Property Expenses	(\$9,085.87)	(\$10,575.51)	(\$11,026.55)	(\$9,320.59)	(\$40,008.52)	(\$37,300.56)	(\$2,707.96)	(\$111,902.00)	35.8%
430 - Financial Management Expenses	(\$1,853.32)	(\$1,040.54)	(\$1,097.92)	(\$1,100.02)	(\$5,091.80)	(\$3,366.64)	(\$1,725.16)	(\$10,100.00)	50.4%
440 - Accounting Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$19,500.00)	0.0%
450 - Archives	(\$570.08)	(\$525.08)	(\$525.06)	(\$525.06)	(\$2,145.28)	(\$2,363.52)	\$218.24	(\$6,931.00)	31.0%
491 - Finance Business Expenses	(\$870.47)	(\$587.64)	(\$692.31)	(\$695.73)	(\$2,846.15)	(\$3,864.88)	\$1,018.73	(\$9,595.00)	29.7%
499 - Finance Personnel Expenses	(\$19,453.02)	(\$19,667.28)	(\$19,692.83)	(\$20,232.37)	(\$79,045.50)	(\$78,100.64)	(\$944.86)	(\$234,302.00)	33.7%
700 - Agency Administrative Costs	(\$1,147.70)	(\$908.19)	(\$2,596.65)	(\$808.85)	(\$5,461.39)	(\$3,404.60)	(\$2,056.79)	(\$10,214.00)	53.5%
791 - Agency Business Expenses	\$0.00	\$0.00	(\$130.00)	\$0.00	(\$130.00)	(\$833.20)	\$703.20	(\$2,500.00)	5.2%
799 - Agency Personnel Expenses	(\$14,190.82)	(\$14,396.38)	(\$14,421.94)	(\$14,938.90)	(\$57,948.04)	(\$54,479.92)	(\$3,468.12)	(\$163,440.00)	35.5%
999 - Default	\$96,164.49	\$99,135.78	\$443,957.68	\$95,671.83	\$734,929.78	\$838,847.00	(\$103,917.22)	\$2,516,541.00	29.2%
TOTAL NET SURPLUS/(DEFICIT)	(\$125,785.35)	(\$78,759.05)	\$221,615.73	(\$152,537.42)	(\$135,466.09)	(\$51,214.64)	(\$84,251.45)	\$1,686.00	(8,034.8)%

The Episcopal Diocese of Western Massachusetts  
Unaudited Comparative Balance Sheet - All Funds - Ivl3  
as of April 30, 2018

	OPERATIONS	AGENCY	FTF	EMWM	2018 All Funds 4/30/2018	2017 All Funds 12/31/2017	Difference \$
Assets							
Cash and Other Non-Property Assets							
Cash and Cash Equivalents	\$704,267.46	\$0.00	\$0.00	\$639,601.12	\$1,343,868.58	\$904,940.25	\$438,928.33
Accounts Receivable - Common Ministry	\$7,407.00	\$0.00	\$0.00	\$0.00	\$7,407.00	\$5,335.00	\$2,072.00
Accounts Receivable, other	\$840.00	(\$950.15)	\$0.00	\$0.00	(\$110.15)	\$30,236.07	(\$30,346.22)
Due From/To Funds	(\$731,172.82)	\$255,533.52	\$0.00	\$475,639.30	\$0.00	\$0.00	\$0.00
Distribution Receivable	\$18,634.02	\$0.00	\$0.00	\$0.00	\$18,634.02	\$387,400.16	(\$368,766.14)
Other Assets	\$36,649.03	\$5,657.01	\$0.00	\$632.81	\$42,938.85	\$20,908.88	\$22,029.97
Interest in net assets of the Trustees/Diocese of WMA	\$32,702,265.31	\$0.00	\$0.00	\$0.00	\$32,702,265.31	\$33,061,366.52	(\$359,101.21)
Bishop's Investments	\$116,444.87	\$0.00	\$0.00	\$0.00	\$116,444.87	\$230,401.40	(\$113,956.53)
Total Cash and Other Non-Property Assets	\$32,855,334.87	\$260,240.38	\$0.00	\$1,115,873.23	\$34,231,448.48	\$34,640,588.28	(\$409,139.80)
Property & Equipment used in Operations							
Buildings and Improvements	\$125,388.29	\$0.00	\$0.00	\$1,175,000.00	\$1,300,388.29	\$1,300,388.29	\$0.00
Equipment	\$49,554.40	\$0.00	\$0.00	\$0.00	\$49,554.40	\$49,554.40	\$0.00
Furniture and Fixtures	\$22,098.88	\$0.00	\$0.00	\$0.00	\$22,098.88	\$22,098.88	\$0.00
Vehicle	\$31,155.00	\$0.00	\$0.00	\$0.00	\$31,155.00	\$31,155.00	\$0.00
Accumulated Depreciation	(\$115,233.57)	\$0.00	\$0.00	\$0.00	(\$115,233.57)	(\$111,025.89)	(\$4,207.68)
Total Property & Equipment used in Operations	\$112,963.00	\$0.00	\$0.00	\$1,175,000.00	\$1,287,963.00	\$1,292,170.68	(\$4,207.68)
Mortgage on 166 Holden Street	\$0.00	\$0.00	\$0.00	\$280,103.59	\$280,103.59	\$284,030.59	(\$3,927.00)
Total Assets	\$32,968,297.87	\$260,240.38	\$0.00	\$2,570,976.82	\$35,799,515.07	\$36,216,789.55	(\$417,274.48)
Liabilities and Net Assets							
Liabilities							
Accounts Payable and Accrued Expenses	\$41,808.79	\$159,396.74	\$0.00	\$533,111.61	\$734,317.14	\$30,925.38	\$703,391.76
Refundable Advances	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30,000.00	(\$30,000.00)
Grant Reserves	(\$1,962.97)	\$0.00	\$0.00	\$0.00	(\$1,962.97)	\$0.00	(\$1,962.97)
Agency Obligations	\$0.00	\$100,843.64	\$0.00	\$0.00	\$100,843.64	\$123,752.29	(\$22,908.65)
Amounts Held on Behalf of Others	\$28,755.52	\$0.00	\$0.00	\$0.00	\$28,755.52	\$26,702.82	\$2,052.70
Line of Credit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$275,000.00	(\$275,000.00)
Retirement Benefit Obligations	\$107,231.20	\$0.00	\$0.00	\$0.00	\$107,231.20	\$107,231.20	\$0.00

The Episcopal Diocese of Western Massachusetts  
Unaudited Comparative Balance Sheet - All Funds - Ivl3  
as of April 30, 2018

		OPERATIONS	AGENCY	FTF	EMWM	2018 All Funds 4/30/2018	2017 All Funds 12/31/2017	Difference \$
Other Postretirement Benefit Obligations		\$1,909,182.00	\$0.00	\$0.00	\$0.00	\$1,909,182.00	\$1,909,182.00	\$0.00
Amounts Pd by Agent on Behalf of Resale Activity		\$0.00	\$0.00	\$0.00	\$1,993.52	\$1,993.52	(\$55,839.50)	\$57,833.02
Total Liabilities		\$2,085,014.54	\$260,240.38	\$0.00	\$535,105.13	\$2,880,360.05	\$2,446,954.19	\$433,405.86
Net Assets								
01-3000-99	Net Assets	\$8,391,561.18	\$0.00	\$0.00	\$0.00	\$8,391,561.18	\$8,807,456.60	(\$415,895.42)
02-3000-99	Net Assets	\$18,399,881.69	\$0.00	\$0.00	\$0.00	\$18,399,881.69	\$18,670,197.07	(\$270,315.38)
03-3000-99	Net Assets	\$4,091,840.46	\$0.00	\$0.00	\$0.00	\$4,091,840.46	\$4,093,340.46	(\$1,500.00)
06-3000-99	Net Assets	\$0.00	\$0.00	\$0.00	\$2,035,871.69	\$2,035,871.69	\$2,198,841.23	(\$162,969.54)
Total Net Assets		\$30,883,283.33	\$0.00	\$0.00	\$2,035,871.69	\$32,919,155.02	\$33,769,835.36	(\$850,680.34)
Total Liabilities and Net Assets		\$32,968,297.87	\$260,240.38	\$0.00	\$2,570,976.82	\$35,799,515.07	\$36,216,789.55	(\$417,274.48)
BEGINNING BALANCE WITH CURRENT YEAR ADJUSTMENTS		\$31,570,994.13	\$0.00	\$0.00	\$2,198,841.23	\$33,769,835.36	\$30,890,489.64	\$2,879,345.72
NET SURPLUS/(DEFICIT)		(\$687,710.80)	\$0.00	\$0.00	(\$162,969.54)	(\$850,680.34)	\$2,879,345.72	(\$3,730,026.06)
ENDING NET ASSETS		\$30,883,283.33	\$0.00	\$0.00	\$2,035,871.69	\$32,919,155.02	\$33,769,835.36	(\$850,680.34)

## 2018 Assessments Billing: Parish Support for Common Ministry

			Assessment	Assessment	Unpaid	Prior Year(s)	May-2018	# Months	
			Billing	Fulfilled	2018	Outstanding	AR Aging	Outstanding	
			as of	as of	Balance	Balance	Balance	as of	
ROW#	pays by EFT		May-2018	May-2018				May-2018	
2.)	St. David's, Agawam		\$ 4,462.00	\$ 4,462.00	\$ -	\$ -	\$ -	0.0	
3.)	Grace Church, Amherst		\$ 26,826.00	\$ 26,826.00	\$ -	\$ -	\$ -	0.0	
4.)	St. John's, Ashfield		\$ 2,649.00	\$ 2,649.00	\$ -	\$ -	\$ -	0.0	
5.)	St. John's, Athol		\$ 2,852.00	\$ 2,852.00	\$ -	\$ -	\$ -	0.0	
6.)	St. Thomas', Auburn		\$ 2,064.00	\$ 2,064.00	\$ -	\$ -	\$ -	0.0	
7.)	St. Andrew's, Blackinton (N.Adams)		\$ 278.00	\$ 278.00	\$ -	\$ -	\$ -	0.0	
8.)	Grace Church, Chicopee - bldg t/b sold - merged w/St Christopher's								
9.)	Good Shepherd, Clinton		\$ 8,610.00	\$ 8,610.00	\$ -	\$ -	\$ -	0.0	
10.)	Grace Church, Dalton			\$ -					
11.)	St. Philip's, Easthampton		\$ 3,592.00	\$ 2,874.00	\$ 718	\$ -	\$ 718	1.0	pymt rec'd 6/4/18
12.)	St. Mark's, East Longmeadow		\$ 9,577.00	\$ 9,577.00	\$ -	\$ -	\$ -	0.0	
13.)	St. Christopher's, Fairview (Chicopee)		\$ -	\$ -	\$ -	\$ -	\$ -		
	Trinity, Chicopee		\$ 4,332.00	\$ 4,332.00	\$ -	\$ -	\$ -	0.0	
14.)	Christ Church, Fitchburg		\$ 26,439.00	\$ 26,439.00	\$ -	\$ -	\$ -	0.0	
16.)	St. Paul's, Gardner		\$ 3,298.00	\$ 3,298.00	\$ -	\$ -	\$ -	0.0	
17.)	St. James', Great Barrington		\$ -	\$ -					
18.)	St. James', Greenfield merged w/St Andrews T.Falls								
	Church of St.James & Andrew, Greenfield		\$ 9,444.00	\$ 9,444.00	\$ -	\$ -	\$ -	0.0	
19.)	St. Francis, Holden		\$ 17,349.00	\$ 17,349.00	\$ -	\$ -	\$ -	0.0	
20.)	St. Paul's, Holyoke		\$ 10,371.00	\$ 10,371.00	\$ -	\$ -	\$ -	0.0	
21.)	St. Luke's, Lanesboro		\$ 1,354.00	\$ 1,354.00	\$ -	\$ -	\$ -	0.0	
22.)	St. George's, Lee			\$ -					
23.)	St. Helena's, Lenox		\$ 2,700.00	\$ 2,700.00	\$ -	\$ -	\$ -	0.0	
24.)	Trinity, Lenox		\$ 12,408.00	\$ 12,408.00	\$ -	\$ -	\$ -	0.0	
25.)	All Saints, Leominster			\$ -					
26.)	St. Mark's, Leominster		\$ 7,635.00	\$ 7,635.00	\$ -	\$ -	\$ -	0.0	
27.)	St. Andrew's, Longmeadow		\$ 17,547.00	\$ 17,547.00	\$ -	\$ -	\$ -	0.0	
28.)	Trinity, Milford		\$ 11,431.00	\$ 11,431.00	\$ -	\$ -	\$ -	0.0	
29.)	St. John's, Millville		\$ 979.00	\$ 979.00	\$ -	\$ -	\$ -	0.0	
31.)	St. John's, Northampton		\$ 14,397.00	\$ 14,397.00	\$ -	\$ -	\$ -	0.0	
32.)	Nativity, Northborough		\$ 15,524.00	\$ 15,524.00	\$ -	\$ -	\$ -	0.0	
33.)	Christ Memorial, North Brookfield		\$ 2,139.00	\$ 2,139.00	\$ -	\$ -	\$ -	0.0	
34.)	St. Andrew's, North Grafton=bldg t/b sold, merged w/Sutton								
35.)	Grace Church, Oxford		\$ 2,919.00	\$ 2,919.00	\$ -	\$ -	\$ -	0.0	
36.)	St. Martin's, Pittsfield		\$ -	\$ -					
37.)	St. Stephens', Pittsfield		\$ 23,638.00	\$ 23,638.00	\$ -	\$ -	\$ -	0.0	
38.)	Christ Church, Rochdale		\$ 4,227.00	\$ 3,381.00	\$ 846	\$ -	\$ 846	1.0	
39.)	Christ Church, Sheffield		\$ 4,246.00	\$ 4,246.00	\$ -	\$ -	\$ -	0.0	
	Trinity, Shelburne Falls *			\$ -	\$ -	\$ -	\$ -		
40.)	Trinity, Shrewsbury		\$ 5,457.00	\$ 5,457.00	\$ -	\$ -	\$ -	0.0	
42.)	Holy Trinity, Southbridge		\$ 3,977.00	\$ 3,977.00	\$ -	\$ -	\$ -	0.0	

## 2018 Assessments Billing: Parish Support for Common Ministry

			Assessment	Assessment	Unpaid	Prior Year(s)	May-2018	# Months	
			Billing	Fulfilled	2018	Outstanding	AR Aging	Outstanding	
			as of	as of	Balance	Balance	Balance	as of	
ROW#	pays by EFT		May-2018	May-2018				May-2018	
43.)	All Saints, South Hadley		\$ 9,945.00	\$ 9,945.00	\$ -	\$ -	\$ -	0.0	
45.)	Southwick Community, Southwick		\$ 8,903.00	\$ 8,903.00	\$ -	\$ -	\$ -	0.0	
46.)	Christ Church Cathedral, Springfield		\$ 30,643.00	\$ 30,643.00	\$ -	\$ -	\$ -	0.0	
47.)	St. Barnabas and All Saints, Springfield		\$ -	\$ -					
48.)	St. Luke's, Springfield		\$ -	\$ -					
49.)	St. Peter's, Springfield		\$ 3,386.00	\$ 3,386.00	\$ -	\$ -	\$ -	0.0	
50.)	St. Paul's, Stockbridge		\$ 6,586.00	\$ 6,586.00	\$ -	\$ -	\$ -	0.0	
51.)	St. John's, Sutton-merged w/N.Grafton								
	Holy Spirit Episcopal Church, Sutton & N.Grafton		\$ 8,414.00	\$ 8,414.00	\$ -	\$ -	\$ -	0.0	
52.)	St. Mary's, Thorndike (Palmer)	11/17/2014							
53.)	St. Andrew's, Turner's Falls - bldg t/b sold merged w/St.James								
54.)	Trinity, Ware		\$ 4,757.00	\$ 4,757.00	\$ -	\$ -	\$ -	0.0	
55.)	Reconciliation, Webster		\$ 4,131.00	\$ 4,131.00	\$ -	\$ -	\$ -	0.0	
56.)	St. Stephen's, Westborough		\$ 9,221.00	\$ 9,221.00	\$ -	\$ -	\$ -	0.0	
57.)	Atonement, Westfield		\$ 10,105.00	\$ 10,105.00	\$ -	\$ -	\$ -	0.0	
58.)	Good Shepherd, West Springfield		\$ 500.00	\$ 500.00	\$ -	\$ -	\$ -	0.0	
59.)	Trinity, Whitinsville		\$ 3,391.00	\$ 3,391.00	\$ -	\$ -	\$ -	0.0	
60.)	Epiphany, Wilbraham		\$ 6,065.00	\$ 6,065.00	\$ -	\$ -	\$ -	0.0	
61.)	St. John's, Williamstown		\$ 21,985.00	\$ 21,985.00	\$ -	\$ -	\$ -	0.0	
62.)	All Saints, Worcester		\$ 34,196.00	\$ 34,196.00	\$ -	\$ -	\$ -	0.0	
63.)	St. Luke's, Worcester		\$ 8,640.00	\$ 8,640.00	\$ -	\$ -	\$ -	0.0	
64.)	St. Mark's, Worcester		\$ 1,371.00	\$ 1,371.00	\$ -	\$ -	\$ -	0.0	
65.)	St. Matthew's, Worcester		\$ 7,051.00	\$ 7,051.00	\$ -	\$ -	\$ -	0.0	
66.)	St. Michael's, Worcester								
66.)	St. Michael's, Worcester		\$ 7,164.00	\$ 7,164.00	\$ -	\$ -	\$ -	0.0	
67.)	All Saints of The Bershires, N.Adams		\$ 9,237.00	\$ 9,237.00	\$ -	\$ -	\$ -	0.0	
68.)	Grace Church in the Southern Berkshires		\$ 10,120.00	\$ 10,120.00	\$ -	\$ -	\$ -	0.0	
	fractions & Shelburne Falls adjustment		\$ -	\$ -					
	<b>TOTALS:</b>		\$ 468,532.00	\$ 466,968.00	\$ 1,564	\$ -	\$ 1,564	2.0	5/31/2018
			100%	100%	0%				
	proof			Billing Fulfilled	Billing Unpaid			8.0	5/31/2017
			(#01-4000-99-999)	at Monthend	at Monthend				
		GL Bal	\$ 468,532.00		Aging Balances:				
					100%	0%		100%	
	Shelburne Falls for 2016		\$ -		Current Yr.Bal	Prior Yr.Bal		Aging Total	
			\$ 468,532.00						

June 4, 2018

## **Update on Diocese's Real Estate Portfolio**

**St. Paul's Chapel, center of Otis, junction of route 23 and 8-** The chapel closed in June of 2015. Otis Town Meeting voted in May, 2017 to accept the chapel and property as a gift. In May of 2018 Town Meeting voted a second time to accept the chapel and property. We believe that we now have a path to the transferring of the deed. We will have to quiet title, and then the Town is obligated by Town Meeting to accept the deed. The first vote in 2017 was just vague enough to allow the Select Board to basically put off the transfer. Some residents of the town have offered to pay up to \$5000 of our legal work to quiet title.

### **133 Dalton Ave., Pittsfield (St. Martin's) – SOLD**

**Sutton/No. Grafton-** The churches in Sutton and North Grafton have merged. The bishop's office is acting as agent for the parish for this sale. They will be selling the building in North Grafton. The REAC approved a NLT sales price of \$400,000 at their Nov. 7 meeting. We listed it in late for \$599,000. We have received offers on both sides of that number but have yet to enter an agreement. There are three interested parties who we will seek agreement with before lowering the asking price. We are concentrating on selling the building in 2018.

**Blackinton-** The Chapel of St. Andrew's in Blackinton (North Adams) is a mission congregation. It's our tiniest congregation and had functioned as a family chapel for decades. The congregation does not meet at the chapel anymore. A Methodist congregation is using the space for worship. We most likely are looking at the sale of that building. We have been working with St. Andrew's treasurer Rick Moon since August 2017 to clean up the deed so that the property could be sold if the need arises, but we have not gotten very far.

Bishop Fisher asked Fr. Tom Damrosch, retired priest who resides in the Berkshires, to serve as Vicar for this mission congregation. Tom has been making incremental progress towards having a discussion with the Moon family and any others. However, if nothing happens this summer the Bishop and Council will have to exert their canonical authority to act without the congregation.

Submitted by Steve Abdo



June 4, 2018

#### Report on Fanning the Flames spending

The attached spreadsheet shows the annual spending of the Fanning the Flames project since its inception in 2015 through year end 2018. The 2018 figures are projected. The report indicates that through year end 2018 we expect \$806,000 to have been invested. You can see a column for projected costs in 2019 which would cap the spending at \$1,000,000.

We have neglected to provide you with up to date reports from the ministries that receive this funding. Those reports will be collected and distributed to you as soon as possible but not in time for this meeting.

The next consideration for Council is to continue these investments in some form with money in the Strategic Ministry Reserve which holds the assets of closed churches. A suggestion is to solicit proposals for new Fanning the Flames initiative through a grant process.

Submitted by Steve Abdow

## Fanning the Flames budget

<b><u>Fanning the Flames Budget</u></b>	<b><u>2015 Actual</u></b>	<b><u>2016 Actual</u></b>	<b><u>2017 Actual</u></b>	<b><u>2018 projected</u></b>	<b><u>2019 projected</u></b>
Liberian Ministry in Worcester			\$ 41,634	\$ 42,467	\$ 43,697
Spiritual Formation Missioner	\$ 38,784	\$ 20,000	\$ -	\$ -	\$ -
Bishop's Choir	\$ 7,500	\$ 4,100	\$ -	\$ -	\$ -
Associate in Worcester	\$ 72,648	\$ 70,656	\$ -	\$ -	\$ -
Associater in Pittsfield	\$ 69,252	\$ 68,083	\$ 35,000	\$ -	\$ -
Trinity Ware	\$ 21,000	\$ 18,408	\$ 18,776	\$ 15,000	\$ 15,000
Clare House, Holden		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Rabbi in Residence		\$ 10,565	\$ 10,000	\$ 12,000	\$ 12,000
Latino/Hispanic Ministry			\$ 110,000	\$ 44,000	\$ 44,000
Cathedral of the Beloved		\$ 5,000	\$ -	\$ -	\$ -
Street Stories			\$ 5,000		
<b>TOTALS</b>	<b>\$ 87,000</b>	<b>\$ 209,184</b>	<b>\$ 263,446</b>	<b>\$ 246,243</b>	<b>\$ 139,697</b>
<b>Total thru 2018</b>				<b>\$ 805,873</b>	

## Meeting of Council Sub-Committee on Resourcing Mission Assessment

May 29, 2018 9:30 -11:00 a.m. Diocesan House

Attending: Steve Abdow, Mac Murray, Frank Minasian, John Cheek, Janet Young,  
Guests: Steve Pierce, Eliot Moss

The focus of the meeting was to:

- Develop a “work to date and moving forward” presentation for the Diocesan Council at their next meeting June 14, 2018.
- Solidify next steps for the sub-committee.

### **To Date and Moving Forward:**

The first charge of the committee was to come up with an assessment tool and a plan to use it. After meeting with the folks from Toronto, Eliot Moss and Steve Abdow are creating a spreadsheet populated with multiple years of parochial report data for our congregations. The specific data sets are:

- ASA
- Plate and Pledge income
- Number of Givers
- Market value of investments held at year-end
- Surplus/Deficit history
- Church School attendance

In addition to the data provided through the spreadsheet there is anecdotal demographic and mission-focus layers to the assessment that need to be considered. This analysis should be done annually when the most recent parochial report becomes available.

It became apparent to the committee that in order to effect the change that can be needed in congregations the diocese would have to increase its ranks. The model of Congregational Coaches to assist with leadership development was brought forward. Toronto has a well-developed corps of trained volunteer coaches. The coaches would work on both adaptive and technical matters with leadership.

Steve Abdow asked Steve Pierce to sit in our meeting as he has done this work in the Diocese of MA. Steve Pierce pointed out:

- The need to understand the culture here in the Central and Western MA in developing our assessment process to achieve the most success in working with churches in transition or otherwise.

- Affirmed the need to work with churches before they are in “free fall” as then there is no saving them.
- Assessment coaches need to come from a wide range of experiences for successful evaluation work with churches. Understanding of building/grounds, good communication and listening skills, financial knowledge, and leadership development skills are necessary thus the need for a variety of coaches, not just one to “know it all”.
- He offered to help train and work with coaches.
- Process involves meeting with parish leadership, listening and observing so there can be consensus with the church on how to move forward.
- Coaches will be “companioning” with the church.

Our sub-committee members, in addition discussed:

- Would it be helpful to have a consultant work with the assessment committee on the “non-data” anecdotal side of the assessment? (Steve Pierce)
- Agreed the NCD -Natural Church Development – program used by the Diocese of Toronto for training and assessment could be beneficial. Pam has received training in this model. Mac to order materials.

### **Next Steps:**

June Diocesan Council Meeting:

- Present the assessment tool. Have Council practice “assessing” 4 or 5 of our churches to better understand the data portion of the process. We suggest looking at some of the churches that are in transition, as well as one or two other interesting situations.
- *Action for Council: Appoint a group to do the assessment work for the whole diocese.*
- At the September meeting of Council we will present a full assessment of all the congregations based on parochial report and the anecdotal data.
- *Action for Council: Appoint a group to work on the coaching project.*
- Over the summer or very early fall develop a “coach” job description defining the purpose and responsibilities of the coach, recruit coaches to begin training in September.
- Steve Pierce and Pam Mott to develop a plan for September training and beyond.
- Work with an initial group of selected congregation on the assessment and leadership development process.

## OUTREACH MINISTRIES DEVELOPMENT RECOMMENDATIONS DIOCESE OF WESTERN MASSACHUSETTS

The Episcopal Diocese of Western Massachusetts is comprised of 52 congregations from the Berkshires in the West to Worcester in the mid-state region. The bishop of the diocese, the Rt. Rev. Doug Fisher, has built on the local commitment to serving a broad range of critical needs across the region and joined lay and ordained leaders in a commitment to serve the broader community as we follow Jesus to the margins. The diocese currently supports three outreach programs that are designed to provide direct service to community members facing economic, social support and service challenges, including women in recovery, US Veterans, people struggling with homelessness and low-income families living at or below the poverty line. These services are offered in seven communities in Central and Western Massachusetts, including:

- ***Walking Together (Worcester)***
  - Recovery support services for women, including daily volunteer supported recovery meetings coordinated by bi-lingual recovery counselor.
  - English as a Second Language (ESL) Classes
  - Single Fathers Support Group
- ***Building Bridges Veteran's Initiative (Greenfield, Northampton, Holyoke, Chicopee, West Springfield, Webster)*** Seeks to cultivate living communities with and for American veterans. In recognition of the sacrifices they had made on behalf of our homeland, "Building Bridges" is committed to the embrace and reconciliation of veterans who continue to be isolated from the very society they fought to protect.
  - Free lunches for Veterans at local community centers, lodges, and other locations.
  - Provide a comfortable venue for veteran's support services to connect with constituents.
  - *Street Stories Video Project* – Captures and disseminates the stories of US Veterans and others who are marginalized from their community and society as a direct or indirect result of their service.
- ***Laundry Love (Pittsfield, Worcester, Milford, Lee)***
  - Laundry Love: Regularly scheduled free laundry services for financially challenged individuals and families; includes food, activities and volunteer support.
- ***Potential program: Western Massachusetts Regional Women's Correctional Center (WCC) Chaplaincy (Chicopee)***

All of the outreach programs are designed to serve the vulnerable populations in our Central and Western Massachusetts communities, including economically disadvantaged women and families, people in substance abuse recovery, and US Veterans.

**Table 1 Program Summary - Constituencies Served**

Constituency	Walking Together	Laundry Love	Building Bridges
Low Income Indiv.	◆	◆	◆
Low Income Families	◆	◆	
Veterans		◆	◆

**OUTREACH MINISTRIES DEVELOPMENT RECOMMENDATIONS  
DIOCESE OF WESTERN MASSACHUSETTS**

People in Recovery	◆		◆
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**Program Funding/ Current Conditions**

The outreach programs are supported by a variety of sources, including: support from local Episcopal parishes, ecumenical partners, foundation grants, major donors, individual contributions, local business contributions (cash & in-kind), and grants from the Episcopal Diocese of Western Massachusetts.

**Table 2. Funding and Support for Programs**

<b>Funding/ Support</b>	<b>Walking Together</b>	<b>Laundry Love</b>	<b>Building Bridges</b>
Episcopal Diocese WMA	\$	\$	\$
Local Parishes	\$	\$	\$
Local Ecumenical	\$	\$	\$
Foundations	\$		\$
Local Nonprofit Partners	\$	\$	\$
Local Businesses	\$	\$	\$
High Net Worth/Major	\$		\$
Individuals	\$	\$	\$

The collective FY2018 budget for these programs is approximately \$200,000. The Episcopal Diocese is providing 75% of this support through:

- Allocations from Diocesan Investments
- Allocations made from the assets of a closed church in Worcester
- Allocations from the Diocesan Annual Operating Budget
- Allocations for the Bishop's Discretionary Fund

**Opportunities to Build a Culture of Philanthropy**

There is demonstrated support for these programs and considerable opportunity for program growth and resource development. There is a general consensus that this is important work of the church and that it is the emerging direction of an increasingly “post-church” culture. There is a tremendous opportunity to build upon current ecumenical and community support for the outreach ministries through existing partnerships. There exists staff capacity to undertake new development efforts and coordination through Episcopal Diocese of Western Massachusetts with support from development consultant.

With this generous support, the outreach programs have served hundreds of vulnerable individuals in Western Massachusetts. And while the existing support can maintain the primary activities for the time being, they not serve to expand their community reach, serve new constituencies, or guarantee a sustainable future. All of the available diocesan funds are finite and must be supplemented and augmented in order to meet growing demand and ensure long-term program viability.

## OUTREACH MINISTRIES DEVELOPMENT RECOMMENDATIONS DIOCESE OF WESTERN MASSACHUSETTS

### Proposed Program and Funding Model

In order to generate new resources for the Episcopal Outreach Ministries in Western Massachusetts, Rainmaker Consulting recommends undertaking a number of development and organizational capacity activities designed to clarify the program goals and activities, strengthen fundraising, and increase overall capacity. Each of these proposed activities will have challenges, but if they are sufficiently addressed there will be potential for considerable reward.

### Strengthen Organizational Capacity

**1. *Put all of the Outreach Programs under a single umbrella, including:***

- An over-arching program name for the initiative
- A program mission statement that encompasses the mission and goals of all of the programs
- A tag line for the program

**2. *Determine the efficacy of establishing a nonprofit or working foundation structure that will allow for community contributions, foundation support to faith-based initiatives, and government grants***

- Review existing models (e.g. Episcopal Charities)
- Review IRS requirements
- Review parameters of major foundations in relation to faith-based initiatives

**3. *Create a Governing Structure for the Outreach Ministries Fund***

- Develop a set of policies and procedures for leadership, including job descriptions, a Conflict of Interest Policy, a Contribution Policy, Confidentiality Agreements, Consent Agenda, Investment Policy and meeting calendar.
- Complete a profile assessment to identify the key skills, connections and characteristics needed for Outreach Ministries leaders.
- Recruit leaders who reflect the organizational goals, community diversity, and skills needed to effectively govern the Outreach Ministries Fund.

**4. *Bring Outreach Programs under oversight of the Canon for Mission Resources and make program resource development part of this position's responsibilities.***

- Revise scope of responsibilities and job description for Treasurer to include:
  - Program oversight (Ongoing program director meetings to review program and development goals)
  - Resource Development (Identification, cultivation, solicitation, and stewardship of funders and prospects in concert with Program Directors)
  - Planning and Implementation of Development Strategy and Communications Plan

**OUTREACH MINISTRIES DEVELOPMENT RECOMMENDATIONS**  
**DIOCESE OF WESTERN MASSACHUSETTS**

- Develop measurable metrics for program success

- 5. *Develop a comprehensive Case for Support that outlines major goals, successes, and history of the social service programs for use in grant applications, donor meetings and other engagement***
- 6. *Develop a Three-Year Program Budget for 2019 – 2021 that clearly delineates existing and proposed funding, program expenses and proposed expansion across all programs.***

**Increase Fundraising and Plan for Sustainability**

Note: This plan is comprehensive and requires a schedule and budget for phasing in and executing. Currently we are not set up to execute such a broad plan. It gives us a starting point and goals.

**1. *Ensure the continuation of existing support for the Outreach Ministries Fund.***

- Maintain funding for program from the Episcopal Diocese for next three years (2018, 2019, 2020) in incrementally decreasing amounts (e.g. 100%, 85%, 70%) to maintain program support and continuity.
- Maintain all current funding from foundations, grants, individuals
  - Grants
    - Submit required reports on time (Interim, Final)
    - Re-apply for existing funding, renewing support
  - Individuals
    - Steward (thank and engage) Major Donors through email, written mail, newsletter communication, event invitations and attendance, thank you notes from participants, etc.
    - Steward individual donors through ongoing communication apart from ANY solicitation for funding
    - Note: Program Directors should engage individuals through local engagement; Treasurer can steward Diocesan personnel and committees
  - Businesses
    - Thank and engage business owners and contributors of in-kind and cash contributions through individual communications, event participation and invitation, participant engagement

**2. *Identify and Secure New Organizational Resources for the Outreach Ministries Fund***

- Assign and train staff or consultants to conduct prospect research. This will include
  - Review of web sites, the Foundation Center, and other resources
  - Ranking prospects for their potential applicability to the Fund
  - Tracking the best next steps (e.g. Moves) for all top prospects
  - Maintain information for vetted prospects that not applicable for future reference



**OUTREACH MINISTRIES DEVELOPMENT RECOMMENDATIONS**  
**DIOCESE OF WESTERN MASSACHUSETTS**

- Conduct prospect research for potential foundation, corporate, and municipal support, including similar organizations and programs, such as:
  - Support for Low-income individuals and families, homeless individual and families, US Veterans, drug and alcohol recovery, substance abuse recovery, addressing opioid crisis, food programs, social services, etc.
  - Support for vulnerable citizens living in Massachusetts (Berkshire, Hampden, Hampshire, Franklin, Worcester counties)
- Cultivate relationships with and engage the most highly aligned prospects
  - Meet with foundation and company leadership
  - Submit Letters of Interest for aligned prospects as per their guidelines
  - Attend funder events, workshops, and sponsored programs
- Apply for funding from most highly aligned prospects by submitting Letters of Interest (LOIs), online applications, and mailed applications according to funder guidelines
  - Maintain ongoing relationships with funders and prospects
  - Submit to funders and prospects for continued funding

**3. Undertake and maintain activities to steward individual donors, businesses, foundations, and partners, including:**

- Submit progress and final reports on time and in accordance with reporting requirements
- Send personalized Thank You notes and postcards to individual donors, prospects, foundation program officers, community relations staff at corporations and businesses, staff and leadership of nonprofit partners
- Invite all funders and prospects to visit program sites, local events, press conferences
- Prominently acknowledge supporters on the *Outreach Ministries* Fund web site
  - *Note: Campaigns need to tie to relevant events, holidays, etc. but should not compete with major holidays or existing campaigns (e.g. Christmas, Stewardship Sundays in September, Easter, companion diocese campaigns).*

**4. Increase individual support for the Outreach Ministries Fund**

- Undertake an annual campaign to solicit existing and potential funders for one-time and monthly contributions
  - Develop an appeal that builds on success stories that comes from a participant, NOT the diocesan or program leadership
  - Proposed: Communicate all of the development efforts by individuals supporting the work across the region
- Undertake an event in 2019 focused on generating considerable financial support and awareness for the Outreach Ministries
  - Build on existing gatherings (Presiding Bishop visit, Convention) that convene church leadership
    - Proposed: Engage the services of an event planner

**OUTREACH MINISTRIES DEVELOPMENT RECOMMENDATIONS**  
**DIOCESE OF WESTERN MASSACHUSETTS**

- Proposed: Engage the assistance of an event planning committee
  - Option: Host a “non-event” online auction or fundraiser on St. Matthew’s Day (Sept. 21), Veteran’s Day, Recovery Month (September)
- Offer a challenge grant to incentivize giving by individuals

## **Guidelines for Memorial Gardens in The Episcopal Diocese of Western Massachusetts**

It is intended that a Memorial Garden as a whole shall be a living, perpetual memorial to the glory of God and to all those buried in it. The Diocese has adopted the following Guidelines to honor the purpose of a Memorial Garden, while safeguarding the fiduciary duties to the Parishioners in future generations. These Guidelines apply to all Memorial Gardens on Church properties throughout the Diocese. A Parish which establishes a Memorial Garden may adopt additional guidelines or policies consistent with these Guidelines.

1. A copy of these Diocesan Guidelines should be provided to anyone who is considering placing cremains in a Memorial Garden.
2. The Parish may develop and maintain written policies with respect to the Memorial Garden, which are consistent with and subject to the Diocesan Guidelines. The Parish policies should be available to all parishioners and should be provided to anyone considering placing cremains in a Memorial Garden. Parish or Diocesan Policies may be changed, from time to time.
3. Under Church and Diocesan Canons, Parish property cannot be encumbered, such as through a deed restriction, easement, or statement that a specific use, such as a Memorial Garden, will continue for any stated time or in perpetuity, without the prior written consent of the Bishop and the Standing Committee. In light of the impossibility of guaranteeing the continuing existence of a Memorial Garden, such approval has not been granted to date, and is unlikely in the future.
4. The Parish may not guarantee or represent that the Memorial Garden will be maintained for any specific period of time or for perpetuity. The use of the Memorial Garden is only by the revocable permission and license by the Parish.
5. Consistent with number 4 above, a fund or gift to support a Memorial Garden, by any name, is not an endowment or permanently restricted fund. It is a Vestry-designated Fund, the use of which may be changed by the Vestry.
6. The Memorial Garden is available for the human cremated remains of those who were members or former members of the congregation and their families, or who had other recognized connections with the congregation. The Rector and/or Vestry will resolve questions about use of the Memorial Garden, and may make limited exceptions to this policy.
7. Memorial Gardens are not cemeteries. For that reason, containers, including biodegradable containers, may not be buried in the Memorial Garden. Cremated remains may be buried (without containers), scattered, or otherwise placed so that they will be permitted to return to nature over time.

8. Specific sites shall remain unmarked. The location for each placement of cremains will be determined by the Rector or Priest-in-Charge.
9. Care should be taken to record at the time of placement in the Memorial Garden, and to ask the families to maintain on a current basis, contact information for families of those whose cremains are placed in a Memorial Garden.
10. If a Memorial Garden must be closed or relocated, the decision will be made with pastoral sensitivity for those families affected. Arrangements will be made for the relocation of representative soil from the Memorial Garden to a suitable location identified by the Parish.
11. A Parish may establish a fee in exchange for the right to bury, scatter, or otherwise place cremains in the Memorial Garden. Such a fee for services is not a tax-deductible contribution, and is separate from any memorial gifts to the Church, which may be tax deductible. Parishes are encouraged to make accommodations for use of the Memorial Garden by eligible persons or families who cannot afford to pay the established fee.
12. Burial rites shall be in accordance with the worship and practice of The Episcopal Church as set forth in authorized worship resources and in consultation with the Rector or Priest-in-Charge of the Parish.

Minutes: Special Meeting of EMWM  
Diocese of Western Massachusetts, Springfield MA  
April 12, 2018

**In Attendance:**

*The Rt. Rev. Douglas J. Fisher, President*

*The Rev. Nancy Webb Stroud, Vice President*

*The Rev. Mac Murray, Secretary*

*The Rev. Pamela Mott, Asst. Secretary*

*Ms. Jill Senecal, Asst. Secretary*

*Mr. Steven Abdow, Asst. Treasurer*

*Pioneer Valley Corridor – The Rev. Heather Blais; The Rev. Derrick Fetz; Ms. Janet Walsh Young; Donna Christian*

*Berkshire Corridor – Mr. John Cheek; The Rev. Dr. Janet Zimmerman*

*Worcester Corridor – Mr. Dick Delorme; The Rev. José Reyes; Mr. Mark Rogers*

*The Rev. Richard Simpson – Executive Staff*

**Excused:**

*Mr. Wayne Gass - Treasurer*

*The Rev. Jesse W. Abell – Worcester*

*Mr. Frank Minasian, Trustee Representative*

**Absent**

NA

**3:58 pm – Meeting called to order**

A vote to approve Minutes of September 7, 2017 (**Appendix A**) was moved, seconded and passed unanimously

**Chaplain:** The Rev. Dr. Rich Simpson offered closing prayer

**Chaplain at next meeting:** The Rev. José Reyes

**4:05 pm – Meeting adjourned**

**EPISCOPAL MISSIONS OF WESTERN MASSACHUSETTS  
BOARD OF DIRECTORS  
CERTIFICATE OF VOTE**

The undersigned duly elected Secretary of Episcopal Missions of Western Massachusetts, does hereby certify that at a duly called meeting of Episcopal Missions of Western Massachusetts held on June 14, 2018 at which a quorum was at all times present and voting, the following votes were adopted:

VOTED: To transfer the investments previously for the benefit of Grace Church, Chicopee, MA, which are listed below, and held by the Trustees for the Diocese to Trinity Episcopal Church, Chicopee, MA; and

To authorize any duly elected Officer of the Diocesan Council of The Episcopal Diocese of Western Massachusetts, acting alone, to execute such Authorizations or Certificates as may be required to evidence this Vote.

<u>Fund Name</u>	<u>Trustee #</u>
Samuel Ervine Christmas	E00801
Esther & Sadie Adair	E00803
Newton Black Memorial	E00804
Mary Elizabeth Lombard	E00805
Spofford Perkins	E00806
Margaret H Smith	E00808
Rectory	E00809
Delanronde Trust	E00810
Grace Sale Proceeds	

And I further certify that as of the date hereof, said votes are unchanged and remain in full force and effect.

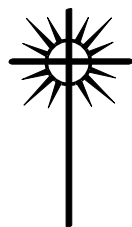
Executed as a sealed instrument under the penalties of perjury, this \_\_\_\_ day of \_\_\_\_\_, 2018.

Signed\_\_\_\_\_

Name:

Office:

The Episcopal Diocese of Western Massachusetts



# The Episcopal Church of the Atonement

36 Court Street • Westfield, MA • 01085 • (413) 562-5461 • [www.atonementwestfield.net](http://www.atonementwestfield.net)

*Drawn in by Grace • Reaching out in Love*

The Rt. Rev. Douglas J. Fisher  
Diocesan Council  
The Episcopal Diocese of Western Massachusetts  
37 Chestnut Street  
Springfield, Massachusetts 01103

June 1, 2018

Dear Bishop Fisher and Members of Diocesan Council,

When we began our budget discussions in November, Mother Nancy Webb Stroud brought the recent work of Council to our attention, and we were particularly interested in the study of the Human Resources Committee concerning clergy salaries in the Diocese. We were somewhat surprised to discover that our rector's salary was much lower than the average salary of male clergy.

We are proud to report that through thoughtful discussion and prayer, negotiations with the rector regarding benefits, careful management of program expenses for the coming year, and a big leap of faith, we have adjusted Mother Nancy's 2018 salary to match the average salary for Male clergy with similar experience and in similar parishes in the Diocese.

We did not take this step without analyses and some education on the Massachusetts Pay Equity Law that takes effect in 2018. One of our members is a human resources professional and she prepared three different scenarios to show us the cost of raising the rector's salary in one, three, or five years. We chose the one-year scenario to show our commitment to pay equity for women. When we reported on this at our Annual Meeting, the decision was accepted without concern or complaint.

We are giving you this information in order to be an example for other parishes who may not know how to approach this topic. We know that it can be awkward to discuss salary after a clergy person has been in place for a while, but we are glad that we did. We are witnesses to the fact that hard conversations can have good results.

We are grateful for the hard work of the Human Resources Committee and commend them for seeking outside review. We hope that you will share the statistics gathered by Insight Performance with all of the parishes in our Diocese. If our experience can be helpful, we would be happy to share with other vestries.

Faithfully,

The Vestry of The Episcopal Church of the Atonement

The Vestry

Barbara Langmore, Sr. Warden • Gary Cole, Jr. Warden • Deborah Bruno, Clerk  
Stephen Adams, Treasurer • The Rev. Nancy Webb Stroud, Rector  
Christopher Steger • Tamara Joseph • Sarah Beard • Maria Parent • Tanya Kellogg • Jean Turgeon