



# THIS IS US:

## 2019 NARRATIVE BUDGET

C.1 Fall Recommended



*The Episcopal Diocese of Olympia*

*The Episcopal Church in Western Washington*





## THIS IS US:

### *The Episcopal Branch of the Jesus Movement in Western Washington*

In union with our Bishop, the Episcopal Diocese of Olympia, part of the Jesus Movement, bears witness to God's redemptive reign and acts out God's inclusive love, peace, and justice, uniquely living out this call within our specific local communities.

- Instead of operating from a "top-down" model that prizes centralized leadership, we believe that each congregation must be free to live out this vision in a way that best meets the unique needs of their specific community.
- We believe that our more than 100 worshipping communities are stronger when there are connections that allow our congregations to share stories, resources, challenges, and triumphs with one another.
- We are committed to equipping and empowering a community who is learning, growing, and gathering regularly to proclaim the good news of God as revealed in the life, ministry, and witness of Jesus Christ.
- We are a liturgical community that is rooted in our common prayer and our celebration of Holy Eucharist, which forms us and prepares us to step beyond our church walls and serve our neighborhoods, our towns and cities, and the world.

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**LOVING  
LIBERATING  
LIFE GIVING**  
*the Jesus Movement*

*from* **BISHOP GREG RICKEL**

Dear Ones,

Many of you will remember the recent visit from our Presiding Bishop. It was a wonderful week with an extraordinary champion of the "Jesus Movement." Our Presiding Bishop was so enthusiastic, impressed, and inspired by our collective work in this diocese. You may think that his visit, wonderful as it was, would have nothing at all to do with making our diocesan budget. You would be quite wrong. I believe the two are very much connected. The budget we are presenting for our upcoming Diocesan Convention is indebted to the image of the "Jesus Movement" as taught to us by our Presiding Bishop and by our own reflections on mission as shown in our most recent vision statement.



This particular budget, perhaps more than earlier ones, lives into our vision of locally-centered programs, networked communities, enhanced sacrament and service, and the formation of leaders. We have increased our commitment to locally-centered mission by both sustaining funding of continuing programs, and by adding new funding for as-yet-unknown "Jesus Movement" programs. We have enhanced support for forming leaders by removing barriers to those who seek to serve God in the church. We have reduced some diocesan expenditures to free up funds for congregations. We have altered our balance between activism and prudence by taking slightly greater financial risks to support programs we believe will enhance the "Jesus Movement." We are doing all of that while also presenting another .5% reduction in the annual assessment rate from 15% to 14.5% leaving even more at the local level and for local ministry.

None of this would be possible without the faithful work of all congregations to support the diocese. We are now collecting virtually all of the assessments in the year they are due. I know this is not easy for all congregations, but that continued support is essential to our collective life. In addition, many people have made and continue to make bequests and gifts to support the work of the diocese and those funds make a huge difference in what we can accomplish in the name of Jesus. Finally, your diocesan staff works hard to spend diocesan dollars wisely and well. The diocesan staff is not large in number, many are part-time with duties elsewhere in the diocese, but all work extraordinarily well to serve us all. I especially thank Canons Dede Moore and Marda Steedman Sanborn for their work on this budget. I ask your prayers for all the staff as they serve God and you.

I invite you to examine this 2019 budget carefully. All congregations will receive a reduction in assessment which should assist in your chosen mission work right away. All programs have been fully funded and new programs added based on our vision. I offer my deepest and heartfelt thanks to your Budget and Finance Committee, so faithfully led by the Rev. Dennis Tierney, and all those who serve with him, as well as all of the others who worked to bring this budget into life. I am confident the Presiding Bishop would approve.

In Christ,

**The Rt. Rev. Gregory H. Rickel, D.Min.**  
VIII Diocesan Bishop  
Diocese of Olympia



# *from* THE BUDGET & FINANCE COMMITTEE

## Dear Members of the Diocese of Olympia,

It is with considerable pleasure that the Budget and Finance Committee of your Diocesan Council presents the 2019 iteration of our operating budget for the Diocese of Olympia. It takes almost a year to develop a budget of this size and complexity, and most of the work takes place quietly as lay and clergy volunteers work closely with diocesan staff to craft a financial document that reflects the mission and vision of the Diocese of Olympia. It takes many hands and many hours to sift through all the competing goods and varied desires of our congregants to arrive at a budget that is sustainable and balanced yet shot through with passion for the Jesus Movement.

We have learned much in recent years about our common financial life. The movement to “real-time” assessment calculations along with careful tracking of actual expenditures has resulted in a sharper analysis of our revenues and our expenditures. The net result is a remarkable document that testifies to the engagement of all our congregations in this work of being a diocese, the careful use of our resources by diocesan staff, the wise balance of taking some risks for the gospel while remembering that we need to be here for many more years to come, and, finally, the benefits we continue to derive from those who left bequests and gifts for our use.

- We will reduce our assessment rate to 14.5% starting in 2019. This immediate reduction means that all congregations will have more funds to spend in their local missional work right away.
- We will engage in new ministries that will benefit congregations. We will support our diaconal and locally-formed priests in their Clinical Pastoral Education requirements.
- We will keep grants to congregations as previously funded.
- We will add a “Jesus Movement” initiative line item in honor of our Presiding Bishop. These funds are for as-yet-unknown initiatives that we pray will come from our congregations.
- We will continue our support for the IONA School and for focused grants to congregations that address particular needs.
- We will make careful cuts to some areas of our diocesan budget; all of these cuts will not, in our view, adversely impact any congregations or on-going programs.

This budget is possible because congregations pay their full assessment now and mostly on-time. This budget is possible because our endowment funds continue to grow and produce dividends. This budget is possible because diocesan staff works hard to spend parsimoniously. This budget is possible because our congregants, across the diocese, support the work of the Jesus Movement.

As chair of Budget and Finance for the past seven years, I have been privileged to work with an extraordinary group of people. I want to commend publicly the following members of the Budget and Finance Committee:

### Committee Members

Ms. Barb Fox, Treasurer of the Diocese of Olympia  
The Rev. Martin Yabroff, St. Andrew, Tacoma  
The Rev. Bonnie Malone, St. George, Maple Valley  
Mr. Guy Davidson, Christ Church, Anacortes

Mr. Joel Rupley, St. Stephen, Longview  
Mr. Jim Campbell, St. Mark, Montesano  
The Rev. R.C. Laird, St. John, Olympia

### Staff Members:

The Rev. Dr. Dennis S. Tierney, Chair  
Ms. Dede Moore, Canon for Governance and Human Resources  
The Rev. Dr. Marda Steedman Sanborn, Canon to the Ordinary  
Mr. Hal Hall, Consulting Canon for Finance

### Ex-officio:

The Rt. Rev. Gregory H. Rickel, Bishop Diocesan



Like my colleagues on the committee, I find this particular work to be deeply gospel-centered. I have claimed that I can tell what people really believe by what they spend their money on. I believe this 2019 budget for the Diocese of Olympia speaks directly and clearly to our collective desire to be followers of Jesus.

In Christ,  
**The Rev. Dr. Dennis S. Tierney**  
Chair, Budget and Finance Committee  
Diocesan Council





## THIS IS US: SEEING CONGREGATIONAL DEVELOPMENT

*We believe that developing healthy congregations is central to our call.*



To that end, we have a clear strategy and ethos of development and health in all our congregations, no matter what the size or context. We assist congregations in facilitating clear expectations and in developing leaders—lay and clergy—who are given the skills and have the understanding to take responsibility for development. We believe that congregational development means far more than numerical growth, but when development is done well, numerical growth is often an outcome.







## THIS IS US: SEEING SUPPORT FOR CONGREGATIONS & LEADERS



TOTAL  
2019 BUDGET  
**\$1,248,357**

**Grants:** We enhance ministry, revitalize congregations and staff for program growth through our grant programs.

**Bishop's Initiative Grants:** We provide seed money for new and innovative ministries from congregations.

**Bishop Directed Grants:** We provide resources for the redevelopment of programs and support for existing programs.

**Evangelism:** We enable congregations to focus their growth potential through social media channels and improved web presence.

**Congregation Consulting Network:** We guide and coach congregation leaders by facilitating workshops, retreats and MMA/MMR work.

**Congregations in Transition:** We provide consultants for congregations

in transition and funding to gather objective data and complete diocesan-identified assessments.

**Data:** We help congregations understand their communities by providing access to MissionInsite demographic information.

**Resources and Leadership Training:** We train leaders for vestries and bishop's committees, supply vestry handbooks, and facilitate leadership training days.

**Property-Specific Congregation Support:** We preserve the integrity of the property that has reverted to the diocese due to congregation closings and support congregations in specific, emergent situations.

**Misconduct Case Manager/ Congregations in Conflict:** We ensure compliance with Title IV (disciplinary

canon), intake officers, and complaint investigations. We also provide support for therapeutic intervention.

**College for Congregational Development:** We provide a comprehensive training program to nurture and develop practitioners from within existing congregation lay and clergy leadership. Most participants are members of teams from congregations within the Diocese of Olympia. The College is open to other participants and has hosted individuals and teams from other Episcopal dioceses and the broader Anglican Communion.

**Jesus Movement Initiatives:** We provide funding for congregationally sourced initiatives that support and help our diocese live into the Presiding Bishop's vision of mission as outlined in the Jesus Movement.

**CPE Education:** We support our diaconal and locally-formed priests in their Clinical Pastoral Education requirements.







## THIS IS US: SEEING STRONG CLERGY LEADERSHIP

### Clergy Days



### Clergy Residency:

Our curacy program partners newly-ordained, seminary-trained clergy raised up from within the Diocese of Olympia with well-qualified clergy mentors in congregations where it has been determined that the curacy experience will be fruitful. The diocesan budget provides half of the salary, pension, insurance, and moving costs for the clergy, and congregations commit to funding the other half.

### Bishop's Holy Land Pilgrimage:

A yearly opportunity to be refreshed in the faith and to deepen the Christian experience.

Bishop Rickel leads clergy in the footsteps of Jesus and encounters God's Word in the Holy Land.

### Bishop's Leadership Conference:

Our week-long conference explores what it means for churches to be faithful, healthy, and effective in their current, local context and helps congregations discern how God may be calling them to grow in new ways.

**First Time in Charge:** Our two-year program for first-time rectors/vicars consists of 18 units with the goal of contributing to successful and effective leadership.

### Clergy Days:

We provide opportunities for training, education, and collegial development through clergy days, workshops, and retreats hosted by the bishop.



## THIS IS US: SEEING EMERGING MISSIONS

*We provide support for ongoing, emerging, and alternative missions in our diocese and support for churches who need assistance in revitalizing and reorganizing their congregations.*

### Emerging Ministry:

We provide support for our Total Common Ministry (TCM) and local priest congregations through our missioner and leadership retreats.







## THIS IS US: SEEING MULTICULTURAL MINISTRIES



TOTAL  
2019 BUDGET  
\$166,000

- Multicultural Congregations: We provide operational assistance for congregations with an ethnic or multicultural identity.
- Leadership Development: We raise up culturally competent leaders among diocesan staff, congregations, and other ministries through mandated diversity empowerment training activities, special events, and formation opportunities.
- We provide connections to and with church-wide ethnic and multicultural ministries.
- Richard Younge Curates of Color Fund: We assist youth and young adults from ethnic minority communities to develop Christian leadership skills.
- We encourage and support the presence of ethnic minority church members at diocesan gatherings and church wide events.
- We advocate for ethnically and racially marginalized peoples.







## THIS IS US: SEEING FAITH FORMATION FOR ALL AGES



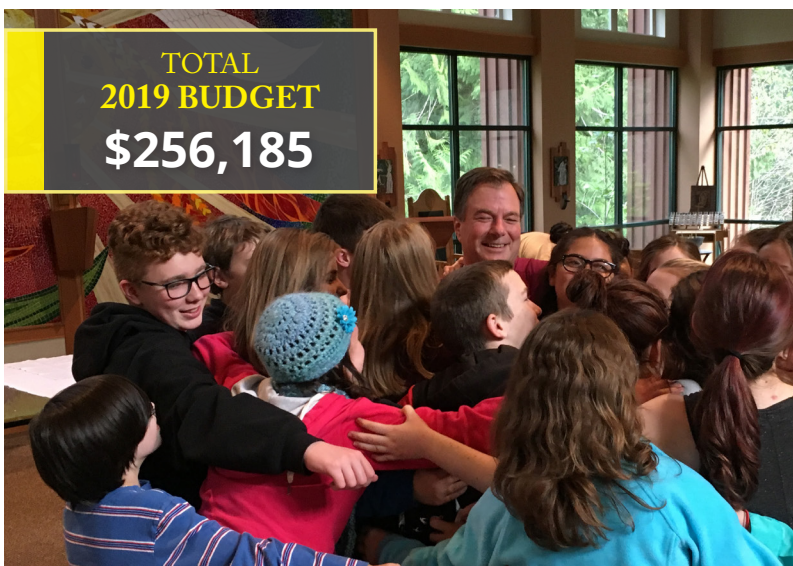
We believe that faith formation is a lifelong process that is unceasing, dynamic, hospitable, and both formal and informal. Individually and communally we are transformed through liturgy, the study of Scripture, learning experiences, and as guardians of God's creation.

**Children's Ministry:** We provide children's ministry programs, consultations, trainings, and workshops for churches and individuals.

**Youth Ministry:** We engage youth in the diocese through the annual 6-Day Camp and summer mission trips, convention participation, trainings, workshops, and networking opportunities for and with other youth leaders. We create an environment of faith and friendship through the music, worship, and workshops of High School Youth Conference (HYC) and Junior High Youth Conference (JYC).

**Young Adults:** We serve the spiritual needs and concerns of undergraduate and graduate students at the University of Washington and Western Washington University through worship, service, community, evangelism, pastoral care, and spiritual discernment. We also host two weekend retreats per year, once in the summer and once in the winter, as a time to gather in a larger young adult community for fellowship, play, meditation, and worship.

**Adult Faith Formation:** We provide instruction, materials, and newsletters to support life-long learning.







## THIS IS US: SEEING FAITH FORMATION FOR ALL AGES



**Resource Center:** We maintain a collection of circulating and reference materials for congregations and individuals.



**Education for Ministry:** Through our contract with Seawanee, we assist in training mentors and support local trainings.



### **Iona Olympia School:**

We provide a comprehensive academic and practical curriculum for postulants seeking ordination to the diaconate, those seeking local ordination as priests and deacons, and for lay persons who feel called to such training.







## THIS IS US: COMMITTING TO THE STEWARDSHIP AND DEVELOPMENT OF ALL OUR RESOURCES

*We believe Christianity is a faith of abundance and blessings that calls us to use our gifts for the glory of God. Becoming a people truly in touch with this reality makes us stewards of all our resources - human, financial, material, and spiritual.*

TOTAL  
2019 BUDGET  
**\$66,575**

*Jesus teaches us that when we live for others we have abundant life. We assist congregational leaders in strengthening the stewardship of all resources in their congregations, and we practice this at a diocesan level.*

*We also believe that, at Creation, God gave us responsibility for the care of the earth. More than ever before, we are aware that what we do affects those in the next generations.*

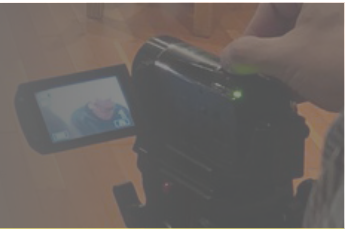
- **Regional Workshops:** We facilitate workshops on planned giving, environmental stewardship, annual campaigns, development, and formation for all ages.
- **Planned Giving:** We formed the Diocesan Joint Planned Giving Ministry Team with the Cathedral Foundation and Saint Mark's Cathedral to bring the very best to planned giving resources and assistance for our congregations and their members.
- **Bishop's Society:** We build membership through support and initiation of Legacy Societies. All people within the Diocese have the option to become members by naming any Episcopal congregation or program in their estate plans.
- **Stewardship Assistance:** We assist churches by providing ongoing support to green initiatives, online giving options, and Stewardship ministries.
- **Bishop's Committee on the Environment:** We support congregations in environmental creation care ministries and administer "green grants" to lower impact on the environment. We assist with energy audits and provide resources for environmental stewardship, responsible investments, and environmental advocacy.
- **Carbon Offset Partnership:** We are part of a global mission partnership to stem climate change and address environmental justice issues through reforestation, reduction of CO2 footprints, community development, relationships, and funding carbon offsets.
- **Episcopal Community Action:** We expand knowledge about and participate in ECA to support ministries involved in meeting the needs of God's people across Western Washington.
- **The Episcopal Network for Stewardship:** We promote and continue to partner with TENS, including corporate and congregational membership, to encourage transformation through stewardship.



## THIS IS US: TELLING OUR STORIES



Our Communications Program shares the story of our diocese and congregations through a variety of communication platforms and supports the work, vision, and ministry of the Office of the Bishop's staff and wider diocese.



TOTAL  
2019 BUDGET  
**\$390,587**

**Across the Diocese:** We publicize events and activities on both a diocesan and congregation level through our weekly newsletter and our diocesan website.

**Social Media:** We use our social media platforms (Facebook, Twitter, Instagram, Google+, and Pinterest) to keep our communities connected throughout the diocese.

**Video Production:** We share messages from the bishop with the wider diocese and provide opportunities for other ministries and programs to request our services.

**Graphic Design:** We provide design services for diocesan programs, departments, and ministries.



**Internet Strategy:** We provide monitoring and resources so congregations can attain presence in cyberspace.

**Database:** We update, maintain, and continually look for new ways to use our systems.

**Digital Technology:** We have video-conferencing sites in five locations around the diocese that enable all willing volunteers to participate at the diocesan level through service on governing bodies, commissions, and committees.

**Congregational Support:** We provide regular consultations to congregations and ministries within the diocese on web design, content, social media, newsletters, and video production. We have also launched a multi-year initiative to begin assisting congregations in the production of high-quality welcome videos and high quality images for digital and print uses.







## THIS IS US: LOOKING OUTWARD AND SEEING GLOBAL MISSION WORK



**Economic Justice:** We explore issues of economic justice (living wage, immigration, racism) through the use of education, training, and electronic media.

**Global Mission Committee:** We support cross-cultural mission, indigenous people, seafarers, and global needs.

### **Bishop's Committee for Justice & Peace in the Holy Land:**

We provide support for the Episcopal parishes, schools, hospitals, and human service missions in the Diocese of Jerusalem (one of our companion dioceses).



### **Caring for Creation Covenant Partnership:**

We have a partnership with the Diocese of Southern Philippines to care for Creation through reforestation, reduction of CO2 footprints, environmental advocacy, establishing tree nurseries, building relationships, and creating and funding Carbon Offsets.

**Diocese of El Salvador:** We support the ministry of the broader church in El Salvador.

**Refugee Resettlement Office:** We provide support for the office's human development programs to low income communities and the resettlement of refugees in Western Washington.

### **Millennium Development Goals:**

We set aside 0.07% of our unrestricted revenue for projects relating to mission and ministry throughout the world.

**ERD:** We support the work of our diocesan Episcopal Relief and Development coordinator.







## THIS IS US: SUPPORTING THE WORK OF THE BROADER CHURCH

We contribute to the work of The Episcopal Church through payment of our full 19% "Asking." (Asking, Apportionment, Assessment)

19% ASKING

We support the work of Province VIII, ecumenical & interfaith ministry, and our ministry partnership with Saint Mark's Cathedral.

TOTAL  
2019 BUDGET  
\$431,000



### Province VIII







## THIS IS US: FULFILLING OUR CORPORATE & CANONICAL RESPONSIBILITIES



### **Diocesan Bishop's Office:**

We provide support for our bishop and his work in the diocese, nation, and world.

### **Commission on Ministry:**

We support and train postulants for the priesthood and diaconate through exams, retreats, and candidacy days.

**Veterans Ministry:** We provide outreach to armed forces veterans and respective/surviving spouses.

### **Canon to the Ordinary:**

We support the office of the Canon to the Ordinary and her work assisting the bishop in diocesan ministry, working with congregations in transition and conflict. We also support the work of our Diocesan Title IV Officer, supporting the decisions and vision of the bishop.

**Finance:** We are committed to responsible business practices – accounting, risk

management, the Diocesan Investment Fund (DIF), insurances, and tax affairs. We also provide financial resources and training for congregation treasurers and staff.

**Archives:** We provide resources for congregations to chronicle and maintain an historical archive, identifying, collecting, and preserving records of enduring value.

### **General Convention:**

We send a full deputation to each triennial meeting of the General Convention of The Episcopal Church.

**Convention:** We gather as a diocesan body for our annual convention to hear from the bishop, converse on issues, elect to diocesan offices, and enjoy fellowship with 600+ Episcopalians from all over Western Washington.

### **Diocesan Governance:**

We provide support for our diocesan governing bodies – Standing Committee, Diocesan Council, and Board of Directors - as well as regional ministries, property management, Personnel Commission, and Liturgy and Arts Commission.

**Central/Plant Services:** We maintain Diocesan House as a place that is not only home to the Office of the Bishop's staff, but also provides meeting space for commissions, committees, affiliated ministries, organizations, and an occasional congregation.

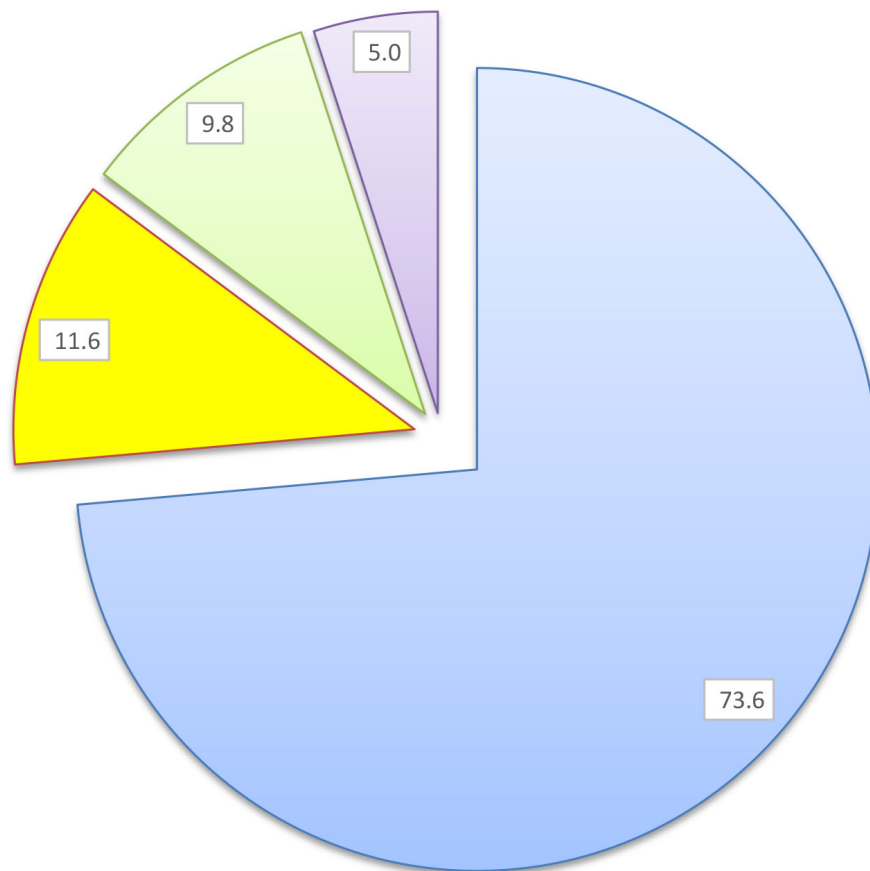




## THIS IS US: 2019 BUDGET TOTALS



DIOCESE OF OLYMPIA  
Planned Sources of 2019  
Budgeted Revenue Dollars



- 73.6% - Net Assessment Revenue
- 11.6% - Dividend Income
- 9.8% - Carry Forwards and Funds Releases
- 5% - Fees, Tuitions, Reimbursements, and Other

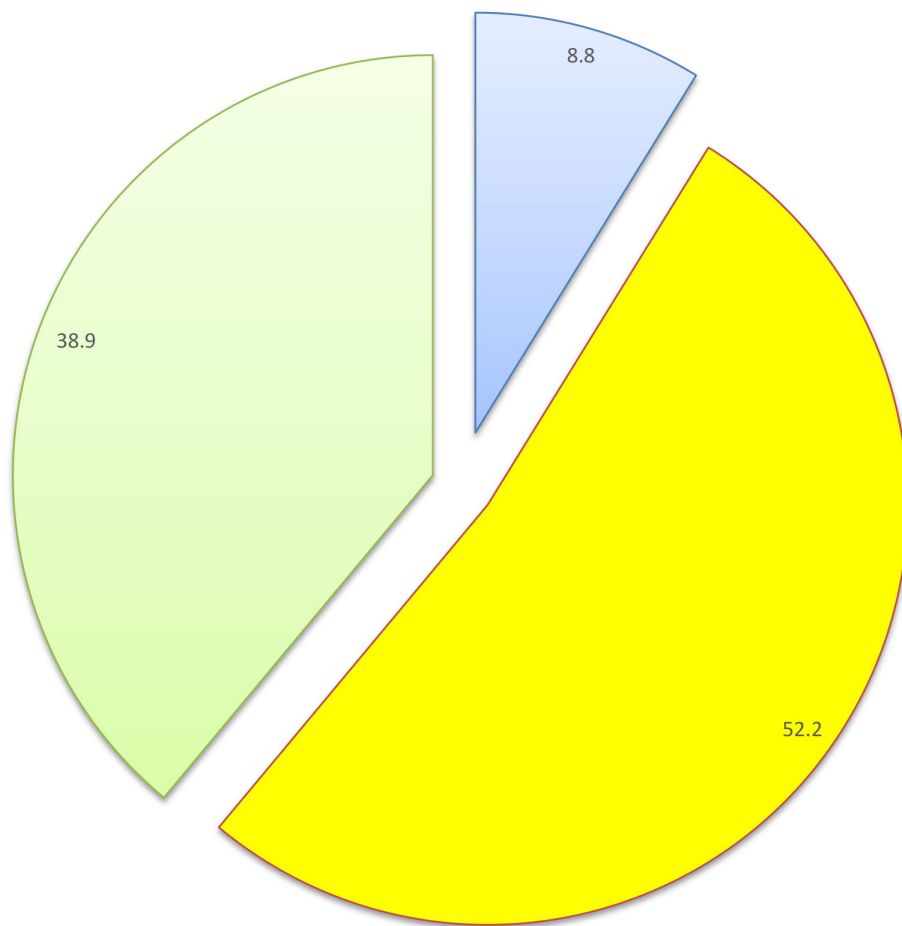




## THIS IS US: 2019 BUDGET TOTALS



### DIOCESE OF OLYMPIA 2019 Expense Summary Percent



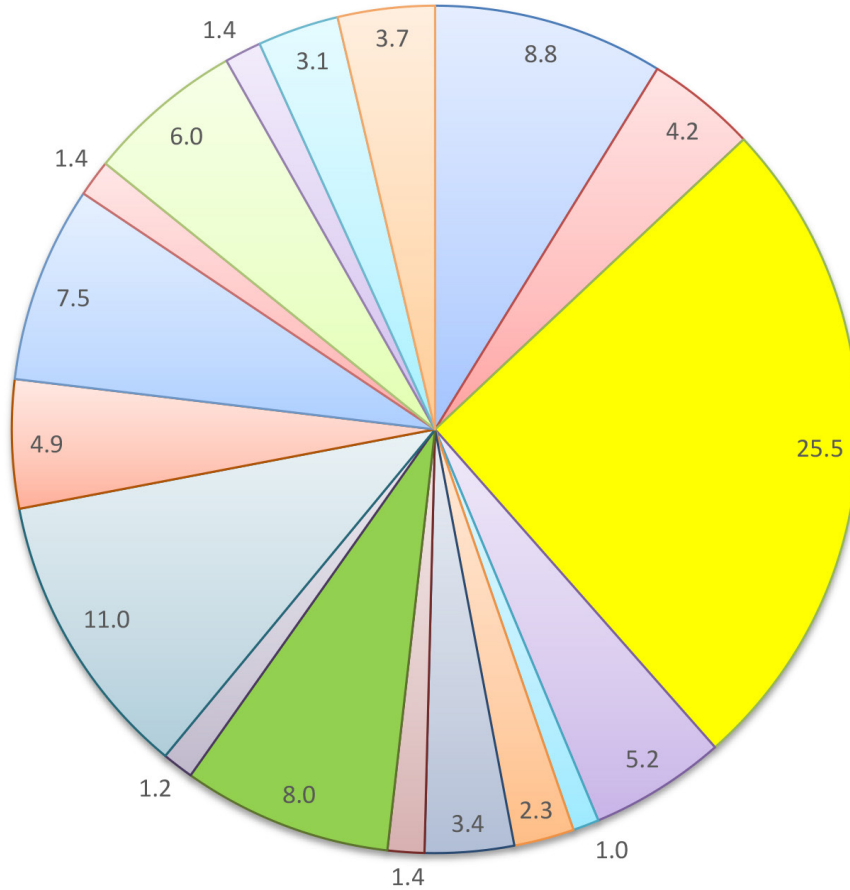
- 8.8% - Supporting the Broader Church
- 52.2% - Programs for Ministry - Empowering Congregations
- 38.9% - Canonical & Corporate Expenses



## THIS IS US: 2019 BUDGET TOTALS



### DIOCESE OF OLYMPIA 2019 Budgeted Expense Detail



8.8% - Supporting the Broader Church

25.5% - Supporting Congregations

1% - Diocesan Resource Center

3.4% - Multicultural Ministries

8% - Communications

11% - Diocesan Bishop's Office

7.5% - Accounting and Finance

6% - Diocesan Governance

3.1% - Benefits

4.2% - Congregational Development

5.2% - Faith Formation: 35 & Under

2.3% - IONA School of Olympia

1.4% - Stewardship and Development

1.2% - 1.2% - Global Mission Work

4.9% - Canon to the Ordinary's Office

1.4% - Archives

1.4% - Property / Liability Insurance Premium

3.7% - Diocesan House





**SUMMARY: (a)**  
cont.

**SUMMARY: (a)**  
cont.

	Description	(1)	(2)	(3)	(4)	Variance Greater Than / (Less Than) 2019 Recommended Budget versus								
		2019 Budget	2018 Budget	2017 Actual	2017 Budget	Amount			Percent					
						2018 Budget	2017 Actual	2017 Budget	2018 Budget	2017 Actual	2017 Budget			
	Canonical and Corporate Expenses													
(23)	Diocesan Bishop's Office	537,079	535,854	453,269	520,498	1,225	83,810	16,581	0.23	18.49				3.19
(24)	Canon to the Ordinary's Office	238,759	259,159	207,302	248,787	(20,400)	31,457	(10,028)	(7.87)	15.17				(4.03)
(25)	Accounting and Finance	366,884	341,684	376,541	345,468	25,200	(9,657)	21,416	7.38	(2.56)				6.20
(26)	Archives	69,315	69,315	67,560	67,231	-	1,755	2,084	-	2.60				3.10
(27)	Diocesan Governance	291,684	295,134	299,906	271,498	(3,450)	(8,222)	20,186	(1.17)	(2.74)				7.44
(28)	Property / Liability Insurance Premium	67,500	63,600	66,487	63,000	3,900	1,013	4,500	6.13	1.52				7.14
(29)	Benefits	150,000	110,410	59,749	143,581	39,590	90,251	6,419	35.86	151.05				4.47
(30)	Diocesan House	180,928	170,627	178,500	186,000	10,301	2,428	(5,072)	6.04	1.36				(2.73)
(31)	Total Canonical and Corporate Expenses	1,902,149	1,845,783	1,709,313	1,846,063	56,366	192,835	56,086	3.05	11.28				3.04
(32)	TOTAL EXPENSES	4,885,997	4,830,343	4,229,162	4,710,068	55,654	656,834	175,929	1.15	15.53				3.74
(33)	Net Cash Excess / (Deficit)	\$ -	\$ -	\$ -	\$ -	\$ (222,586)	\$ (274,835)	\$ (60,755)	(100.00) %	(100.00) %				(100.00) %

(a) Chart Title: Data has been restated to exclude Board Works dividend income and unrealized capital gains from the Diocesan Cash Management Account retroactive to January 01, 2016.

(b) Side Caption, Line 1: Budgeted / Actual gross percentages assessed are / were, as follows: 2019, 14.5%; 2017 - 2018, 15%; 2016, 16%; 2013 - 2015, 17%; 2012, 17.5%; 2007 - 2011, 18%; 2004 - 2006, 20%.

In addition, 2019 Budget, 2018 Budget, and 2017 Budget Net Assessments Revenues have been reduced by a 1.39%, a 1.36%, and a 2.20% "Short Fall" provision respectively.

(c) Side Caption, Line 7: The approved 2017 Budget authorized up to \$287,558 to be pulled from Un-restricted Net Assets to balance the budget. Amounts totaling \$73,477 were actually pulled from Un-restricted Net Assets in that year.

For those interested in more detail than provided by this summary, a full line item version of the budget is posted on the 2018 convention page of the diocesan website.