

PEOPLE OF THE WAY

2020 NARRATIVE BUDGET

C.1 Fall Recommended



The Episcopal Diocese of Olympia

The Episcopal Church in Western Washington



PEOPLE OF THE WAY

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 worshiping 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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THE BUDGET & FINANCE COMMITTEE, DIOCESAN COUNCIL

Dear Members of the Diocese of Olympia,

It is with considerable pleasure that the Budget and Finance Committee of your Diocesan Council presents the 2020 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.

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 leave bequests and gifts for our use.

We will maintain our assessment rate at 14.5% of Net Disposable Income. We believe that this is prudent considering the economic uncertainties in the world but also sustainable due to our proven pattern of income and expenditure. We also are engaging in new ministries that will benefit congregations. We have added a new program for Management Skills for Non-Profit Organizations. We will be adding a new level of Congregational Development training for congregations which have completed the first level of training. We continue our Bishop's Leadership Conference in 2020 and plan to offer this program every other year. We continue with both congregational support programs and clergy support programs that provide assistance in a variety of ways.

This budget is possible because congregations pay their full assessment 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 with their time, treasure, and talent.

As chair of Budget and Finance for the past eight 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. Bonnie Malone, Saint George, Maple Valley
Mr. Guy Davidson, Christ Church, Anacortes
Mr. Joel Ruple, Saint Stephen, Longview

Mr. Jim Campbell, Saint Mark, Montesano
Mr. David Coburn, Saint James, Kent
The Rev. R.C. Laird, Saint John, Olympia

Staff Members:

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



Like my colleagues on the committee, I find this 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 2020 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



PEOPLE OF THE WAY: 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.





PEOPLE OF THE WAY: SUPPORT FOR CONGREGATIONS & LEADERS



TOTAL
2020 BUDGET
\$974,629

the College
for Congregational Development

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

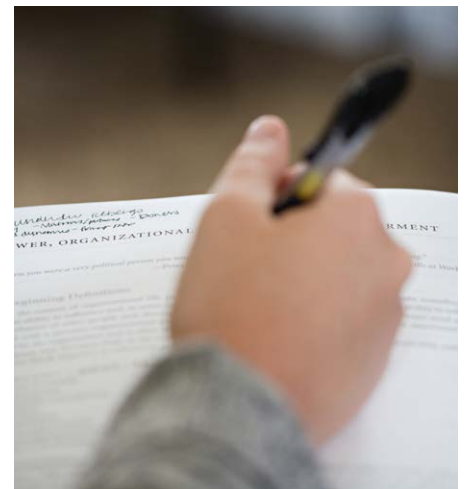
Data: We help congregations understand their communities by providing access to MissionInsite demographic information.

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.





PEOPLE OF THE WAY: 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.

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.



PEOPLE OF THE WAY: 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.



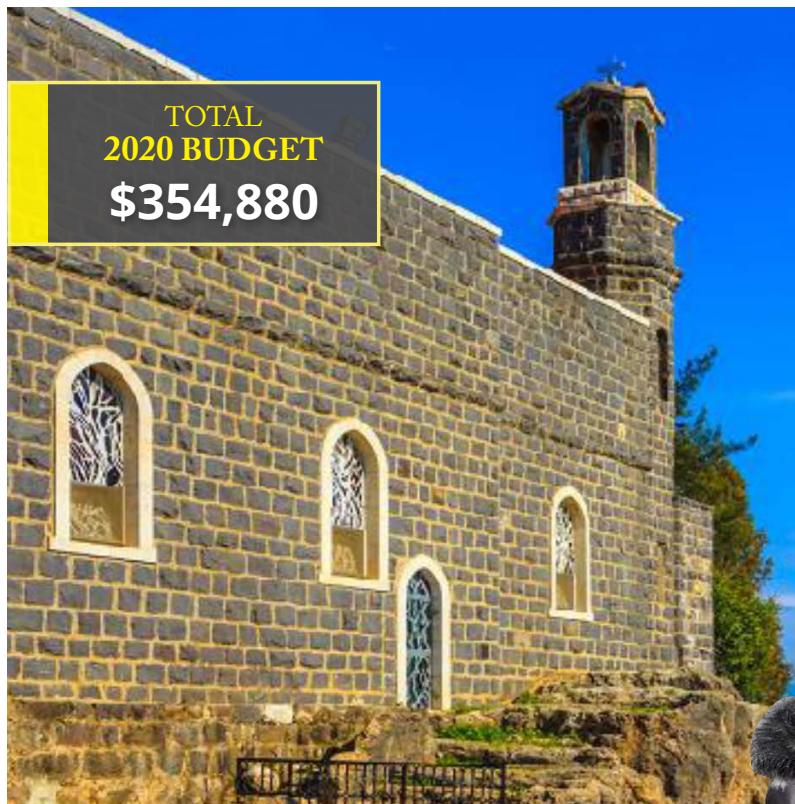
Emerging Ministry:

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



PEOPLE OF THE WAY: BISHOP DIRECTED PROGRAMS

TOTAL
2020 BUDGET
\$354,880



Bishop's Holy Land Pilgrimage:

A yearly opportunity to be re-freshed 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 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.

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.

Non-Profit Management Training:

This new program on management skills training for non-profit organizations will be open to lay and clergy leaders in the diocese.

Diocesan House

Carbon Offsets: This new initiative provides off-sets for the carbon dioxide emitted due to lighting and heating Diocesan House by planting trees in the Southern Philippines through our sister diocese so that the Office of the Bishop will become carbon neutral.

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.



THE BISHOP'S
LEADERSHIP CONFERENCE

APRIL 27-MAY 1
FORT WORDEN, WA



PEOPLE OF THE WAY: MULTICULTURAL MINISTRIES



- 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.



PEOPLE OF THE WAY: FAITH FORMATION FOR ALL AGES

Faith Formation

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.





PEOPLE OF THE WAY: 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 Sewanee, 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.

**TOTAL
2020 BUDGET
\$100,372**





PEOPLE OF THE WAY: 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
2020 BUDGET
\$61,300**

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.





PEOPLE OF THE WAY: 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
2020 BUDGET
\$404,713

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.





PEOPLE OF THE WAY: GLOBAL MISSION WORK



TOTAL
2020 BUDGET
\$59,600

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.



PEOPLE OF THE WAY: 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)

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

TOTAL
2020 BUDGET
\$437,000



Province VIII





PEOPLE OF THE WAY: FULFILLING OUR CORPORATE & CANONICAL RESPONSIBILITIES



**TOTAL
2020 BUDGET**
\$1,864,350

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.

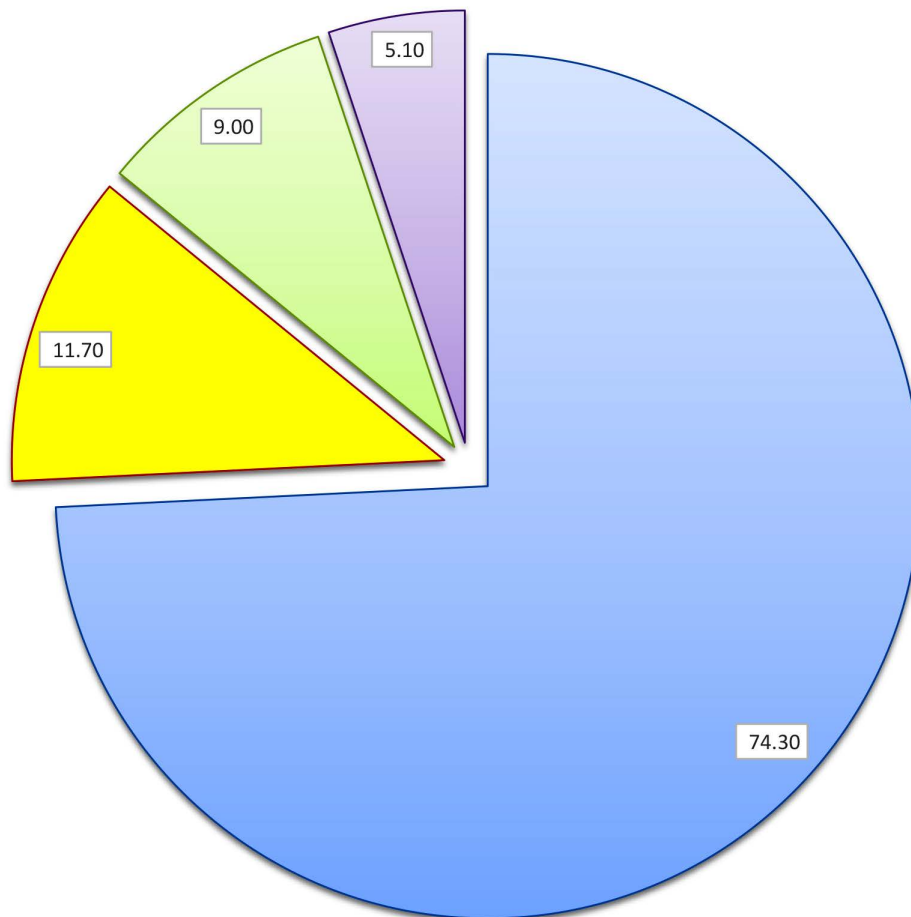




PEOPLE OF THE WAY: 2020 BUDGET TOTALS



DIOCESE OF OLYMPIA
Planned Sources of 2020
Budgeted Revenue Dollars



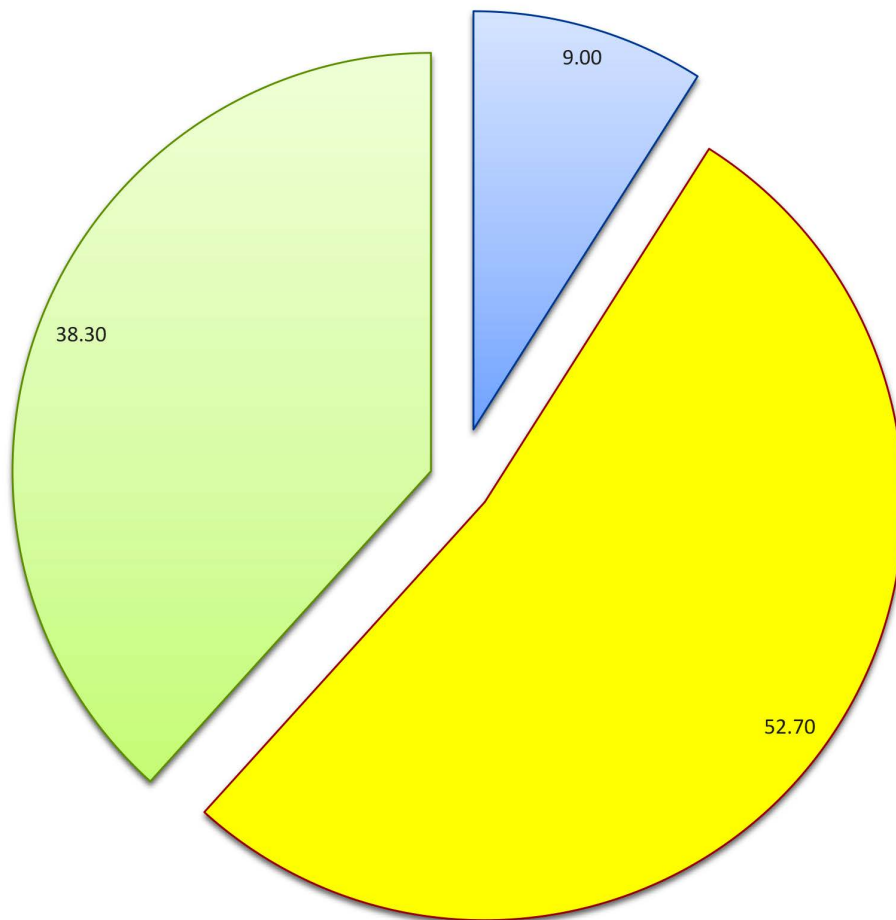
- 74.3% - Net Assessment Revenue
- 11.7% - Dividend Income
- 9% - Carry Forwards and Funds Releases
- 5.1% - Fees, Tuitions, Reimbursements, and Other



PEOPLE OF THE WAY: 2020 BUDGET TOTALS



DIOCESE OF OLYMPIA 2020 Expense Summary Percent



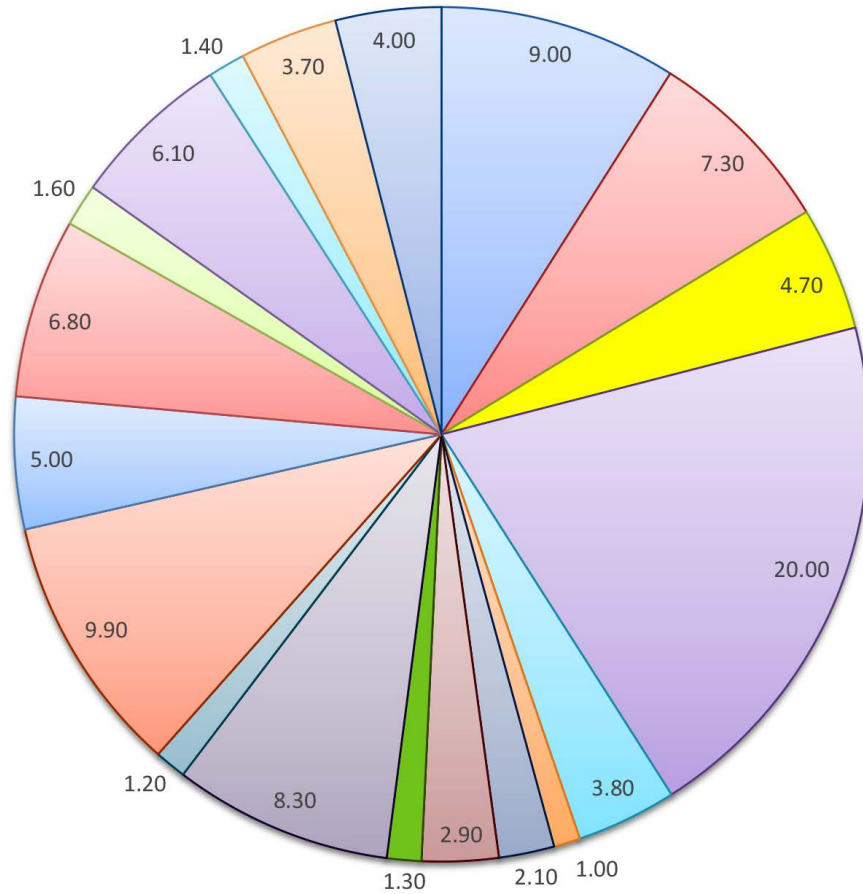
- 8.9% - Supporting the Broader Church
- 51.3% - Programs for Ministry - Empowering Congregations
- 39.8% - Canonical & Corporate Expenses



PEOPLE OF THE WAY: 2020 BUDGET TOTALS



DIOCESE OF OLYMPIA 2020 Budgeted Expense Detail



- | | | |
|---------------------------------------|---|---|
| ■ 9% - Supporting the Broader Church | ■ 7.3% - Bishop Directed Programs | ■ 4.7% - Congregational Development |
| ■ 20% - Supporting Congregations | ■ 3.8% - Faith Formation: 35 & Under | ■ 1% - Diocesan Resource Center / Library |
| ■ 2.1% - IONA School of Olympia | ■ 2.9% - Multicultural Ministries | ■ 1.3% - Stewardship and Development |
| ■ 8.3% - Communications | ■ 1.2% - Global Mission Work | ■ 9.9% - Diocesan Bishop's Office |
| ■ 5% - Canon to the Ordinary's Office | ■ 6.8% - Accounting and Finance | ■ 1.6% - Archives |
| ■ 6.1% - Diocesan Governance | ■ 1.4% - Property / Liability Insurance Premium | ■ 3.7% - Benefits |
| ■ 4% - Diocesan House | | |

- (1)
- (2)
- (3)
- (4)
- (5)
- (6)
- (7)
- (8)
- (9)
- (10)

2020 BUDGET C.1 FALL RECOMMENDED

DIOCESE OF OLYMPIA

2020 Recommended Budget versus 2019 Budget, 2018 Actual, and 2018 Budget

SUMMARY cont.

	Description	Variance Greater Than / (Less Than) 2020 Recommended Budget versus									
		Amount					Percent				
		(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
2020 Budget											
Pre-Convention											
	Recommended	2019 Budget	2018 Actual	2018 Budget	2019 Budget	2018 Actual	2018 Budget	2019 Budget	2018 Actual	2018 Budget	
(21)	Canonical and Corporate Expenses										
(22)	Diocesan Bishop's Office	482,245	485,192	462,973	466,354	(2,947)	19,272	15,891	(0.61)	4.16	3.41
(23)	Canon to the Ordinary's Office	241,288	244,288	212,424	259,159	(3,000)	28,864	(17,871)	(1.23)	13.59	(6.90)
(24)	Accounting and Finance Office	328,790	340,162	346,466	341,684	(11,372)	(17,676)	(12,894)	(3.34)	(5.10)	(3.77)
(25)	Archives	76,119	69,119	67,621	69,315	7,000	8,498	6,804	10.13	12.57	9.82
(26)	Diocesan Governance and Human Resources	295,221	297,156	286,114	295,134	(1,935)	9,107	87	(0.65)	3.18	0.03
(27)	Property / Liability Insurance Premium	67,500	67,500	65,001	63,600	-	2,499	3,900	-	3.84	6.13
(28)	Benefits	177,750	109,729	63,401	110,410	68,021	114,349	67,340	61.99	180.36	60.99
(29)	Diocesan House	195,437	185,906	170,715	170,627	9,531	24,722	24,810	5.13	14.48	14.54
(30)	Total Canonical and Corporate Expenses	1,864,350	1,799,052	1,674,714	1,776,283	65,298	189,636	88,067	3.63	11.32	4.96
(31)	TOTAL EXPENSES	4,861,812	4,778,872	4,166,754	4,830,343	82,940	695,058	31,469	1.74	16.68	0.65
(32)	Net Excess / (Deficit)	\$ -	\$ -	\$ 31,985	\$ -	\$ -	\$ (31,985)	\$ -	% (100.00)	%	-

(a) Side Caption, Line 1: Budgeted / Actual gross percentages assessed are / were, as follows: 2019 - 2020, 14.5%; 2017 - 2018, 15%; 2016, 16%; 2013 - 2015, 17%; 2012, 17.5%; 2007 - 2011, 18%; 2004 - 2006, 20%.

(b) Side Caption, Line 1: Each of the 2020, 2019 and 2018 Assessments Revenue Budgets shown here have been reduced by a \$50,000 "Short Fall" provision.

For those interested in more detail than provided by this summary, a full line item version of the budget is posted on the 2019 convention page of the diocesan website.