



The Episcopal Diocese of Olympia

The Episcopal Church in Western Washington

www.ecww.org

TO: All Congregations
FROM: Diocesan Council
RE: Revisions of Diocesan Policy Regarding Prior Years Unpaid Assessments

During 2013 and 2014, the Diocesan Council updated and revised its policy for granting relief of prior years' unpaid assessments. This letter informs all congregations of the change in policy, and its full use starting for unpaid assessments newly accrued in 2015 and beyond.

Background: This relief policy was first written and approved in 2008. There were over fifty congregations in the Diocese at that time that had at least some amount of unpaid assessments. All of these unpaid assessments had been accumulating since 2001, as Bishop Warner and Diocesan Council had declared a "Jubilee Year" in 2000, granting forgiveness of all previous unpaid assessment amounts. During the years since 2008 this policy has helped in working individually with congregations to clear up about 80% of all the congregations' issues with prior years' unpaid assessments. This has been resolved mostly by full forgiveness of the unpaid assessments but in a few cases some amount of the unpaid back assessment was paid (usually in the case for one month missed in one year, or for small amounts). Diocesan Council recognizes that each year some new unpaid assessments do occur, and the plan by the Canon to the Ordinary and Budget & Finance Committee of Diocesan Council, in recent years, has been to work with these new cases in a timely manner. *[Note, though, that relief for any prior years' unpaid assessment cannot occur until a year of full assessment payment has occurred, and the congregation is up to date with the current year's assessment payments.]*

Policy Features: This policy from 2008 (and its revision in 2013/2014) is in accord with diocesan Canon 7, Section 1(i): Diocesan Council shall have the power to grant relief to any congregation by remission of all or part of its un-paid assessment balance, excepting that no balance owed for the current year shall be reduced. The policy establishes a specific process for handling any unpaid prior years' assessment for a congregation, including:

1. Congregations initiating a request for assessment relief and initial handling of requests by the Canon to the Ordinary and Budget & Finance Committee.
2. The processing of the request itself, including documentation from the congregation needed for Budget and Finance Committee to determine the proper response to the request for relief, and the appointing of a Budget and Finance Committee liaison to work with the congregation during the process.

3. The preparation of the final agreement to be approved by Diocesan Council and communication by the Canon to the Ordinary to the congregation of the agreement determined.

Key Changes Made in 2013 and 2014: Changes to this policy involve clarification of the documentation needed from the congregation to process the request for relief, the establishing of the liaison, and the new requirement to pay at least some portion of the previous unpaid assessment (consistent with the ability of the congregation to make payments). [Congregations that have the ability to pay will not receive assessment relief without a recommendation from both the Canon to the Ordinary and the Bishop noting any special circumstances. Apart from exceptional cases, it is expected that no more than 90% of prior year unpaid assessments should be relieved.] Also, this policy is being used for new cases of unpaid assessments for 2015, and on; those unpaid assessments that occurred prior to 2015 and that have not, as yet, been resolved, will be addressed on a case-by-case basis by the Canon to the Ordinary and the Budget and Finance Committee of Diocesan Council.

Advice to Congregations: It is best if congregations remain current on diocesan assessment payments. By converting to “real-time” calculation of that assessment for 2015, Diocesan Council believes that congregations should be able to remain current with their assessment. If a congregation falls behind in its assessment payment, early contact with the Canon to the Ordinary and the Budget and Finance Committee about this difficulty is strongly urged. Clergy in charge of congregations should familiarize themselves with this policy and work with congregational leadership to ensure that they are fully aware of this policy change and understand it. Members of the Budget and Finance Committee are available to meet with congregations to explain these changes and will work with congregations to help them comport with these new policies. Any questions should be directed to Diocesan Council through the office of Dede Moore, Canon for Operations.

Your Diocesan Council

Be Attitudes: Mr. Tom Boyns, St. Stephen, Seattle; The Rev. R.C. Laird, St. Luke, Seattle. **Columbia:** Ms. Sally Barnes, St. James, Cathlamet; The Rev. Jaime Case, St. Luke, Vancouver. **Eastside:** The Rev. Lex Breckinridge, St. Thomas, Medina; Ms. Sunshine Pegues, St. Margaret, Bellevue. **Evergreen:** Ms. Nadine Baxter, St. Matthew/San Mateo, Auburn; The Rev. Bonnie Malone, St. George, Maple Valley. **Holy C:** Ms. Jamie Balducci, Epiphany Parish of Seattle; The Rev. James Thibodeaux, St. Peter, Seattle. **Mt. Baker:** Ms. Betty Anne McCoy, Christ Church, Anacortes; The Rev. Jonathan Weldon, St. Paul, Bellingham. **Peninsula:** Ms. Joan Collins, St. Barnabas, Bainbridge Island; The Rev. Dennis Tierney, St. Barnabas, Bainbridge Island. **Rainier:** Ms. Charlotte Brown, St. Joseph-St. John, Lakewood; The Rev. Kendall Haynes, St. Matthew, Tacoma. **Sno Isle:** The Rev. Rilla Barrett, St. Stephen, Oak Harbor; Ms. Denice Patrick, St. Hilda-St. Patrick, Edmonds. **Willapa:** The Rev. Joe Mikel, St. David of Wales, Shelton; Ms. Susan Rolfe, St. Andrew, Aberdeen. The Rt. Rev. Greg Rickel, bishop diocesan. Mr. Joe McGuire, St. Bede, Pt. Orchard, Diocesan Convention.