

College for Congregations Interviews

Barb Fox and Jim Campbell met at breakfast with participants of the College for Congregational Development on November 3, 2012. Approximately 15 congregations represented and more than 10 clergy present: All Saints-Seattle, St. Columba-Kent, Emmanuel-Mercer Island, St. Claire-Snoqualmie, Christ Church-Anacortes, Christ Church-Puyallup, Grace-Bainbridge, St. Joseph-St.John-Tacoma, St. James-Kent, St. Pau-Bremerton, St. Hilda-St. Patrick-Meadowdale, Christ Church-Tacoma, Holy Spirit-Vashon, St. John-Snohomish, Good Samaritan-Sammamish, Diocese of Olympia Cursillo.

Comments:

- Assessment is pay like what Jesus told the Jews-pay to Caesar what is Caesar's, it is duty in belonging to the Diocese.
- Most people in our churches are not from an Episcopal background, The Diocese should prepare a single page explanation of what our diocesan budget covers, provides, how it is funded (including assessment)
- Believe many congregations now try to figure out ways to get out of paying some of their assessment through special funds split off from operating revenues.
- Thanks to the diocese for reducing the assessment so far to help out congregations. Needs to be a way for congregations either struggling or growing fast to deal with assessment staying high when the church declines, or to help a church with increased expenses when growing quickly and cannot keep up with services.
- Need a way for the diocese to become more involved in congregations that seem to not only think inwardly, and not look at the community needs around them, not growing and not doing external ministry.
- Believe most everyone in congregations has not idea about the diocese and relationship to the churches, unless they are directly on the finance committee or church leadership, or delegates

Comment Sheet turned in by Rev. Sheila Crisp-St Joseph-St. John, Tacoma:

They pay their assessment and they have received financial support from the Diocese as well as from other programs. The role of the assessment supports the work of the Diocese and the church at large and is not seen as a tax. Assessment should be more real time than 2 years back in a declining or increasing congregation; outreach expenditures are good. The impact on their congregation of the current assessment system is "a bit of a burden DUE TO PREVIOUS grants, (which created revenue). Feel the current percent is good. Services best provided by the Diocese and diocesan budget: D-House, resource center, canons and missionaries, outreach, grants program and College for Congregational Development

Comment sheet turned in by Rev. Mark Miller-Snohomish:

Role of the assessment is to connect communion of churches; assessment in declining or increasing parish revenue should be a rolling average; outreach expenditures should be a deduction (assume NDI) and capital expenditures should be deduction (assume NDI); the impact of the current reduced assessment rate has not helped; current NDI is OK; services best provided by diocesan budget: oversight/ordinations/support for formation programs/regional outreach/regional evangelism. Under what ways should assessment take note-congregation staffing expenses the comment said new staff, but no further explanation.

Email received today (11/27/12) from Rev. Patty Baker at St. Claire-Snoqualmie indicating they are discussing the questions tonight. Asked if she would get back to me if possible by Friday AM to be able to report feedback to the meeting. They want a person (I volunteered) to meet with them. This is for a general informational discussion on assessments, budgets, etc.

Congregation Meetings

Epiphany, Seattle, September 13, 2012

Meeting with Epiphany Parish rector and finance committee 9/13/12. Jim Campbell of ARTF was also present. Notes from both Jim and Barb.

Jim made an initial presentation for the purpose of explaining the assessment in relation to the Diocesan budget. Rector Doyt Conn was under the impression assessment went to pay the bishop's salary; he is no longer under that impression.

Epiphany pays their full assessment; large congregation, high revenue, large expenses. They see the role of the assessment in the life of the church as a tithe to the Diocese and broader Anglican Communion. They do not have a mission statement. They can provide the services themselves that are provided by the Diocese such as education-from DSOMAT or resource center. They see that the assessment benefits the parish thru supporting a relationship with the bishop, investment opportunities, insurance, but feel there is no need for stewardship training (believe this is done through relationships within the parish), questions why the diocese does outreach, multi-cultural work doesn't have much meaning; what is provided should be scalable. They can do things with local congregations that don't need the diocese, such as youth programs and educational opportunities. Their assessment could mean another 2 full time staff people. They have not been very connected to the diocese in recent years, but are striving to do better. They see this as a way to support others, but not very useful to their ministry efforts. They are trying to educate convention delegates this year and have a liaison between delegates and vestry. What could be provided is a means for purchasing supplies on a large scale for all churches; would like to see 1-3 bishops who do what bishops uniquely do (theological, canonical, pastoral). They can see a smaller diocesan staff and fewer programs, which would reduce the size of the budget and leave more assessment dollars with the congregations to do their ministry, pay staff and provide programs.

Grace, Bainbridge, January 14, 2013

Jim Campbell met with Don Warkentin, the outgoing Sr. Warden, and Michael Sherry, the Treasurer of Grace Church at a coffee shop in the town of Bainbridge. They were well informed about their own church's operations and finances, and had thought carefully about the questions sent to them for thought before our meeting. The discussions were excellent and brought forth a lot of passion and ideas.

1. What is the role of the assessment in the life of your Church? Most of their congregation knows little about the assessment, other than it is a clear line item that stands out in their operating budget. In the past couple of years there has been a real effort to devise a short summary of what the assessments goes to in the Diocese, and how their church benefits, but also support the rest of the Diocese with their payment. The term used was "acceptance" that the assessment is there and needs to be paid. Their church is part of something larger than themselves. Don, who serves as a delegate to Diocesan convention recently, said he was

impressed by the larger church represented there, and learned a lot about other churches and what they do at each of their churches in ministry.

2. When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features? Attributes—fair, clear and easy to calculate, and has value in that the Diocese uses the assessments for valuable resources and programs. Bishop and other Diocesan staff visit and work with the church on various issues, participating in the College for Congregational Development, participating in other Diocesan workshops to learn and to share with others. No mention that the present assessment causes a burden to their ministry, in fact in recent years and even now they benefit by a grants and a resource sharing arrangement for their associate priest with the Diocese.
3. In what ways should the assessment take note of:
 - declining or increasing parish revenue Some type of averaging over a few years to level out large changes in the assessment year to year.
 - congregation staffing expenses Worth looking at to help with basics of the operating budget.
 - outreach expenditures Supports definitely this type of deduction, since they strive to do at least 10% of the budget plus other offerings for outreach.
 - capital expenditures—Present system is fine. In fact, discussing the possibility of maybe a simple assessment formula, with little or no deductions and much lower rate, brought up that raising money for major repairs or improvements and then having it assessed would be considered very poor. Need to support keeping up facilities with deductions, low loans, and even grants.
4. What is the impact on your congregation of the current assessment system? Hard to pay for more programs and staff as they grow quickly, and to do outreach when they are squeezed to pay assessment. But, they also see direct benefits to their church from the Diocese (grants for more staff, shared resources), and they know their money helps other churches in need—crisis \$\$, transitional issues, etc. Looking to be a part of the Curacy program of the Diocese to help develop new priests, etc. Related to assessments and budgeting—mandates concerning staff salaries and benefits cause real challenges for their budgeting; they understand treating staff fairly but still is hard to swallow.
5. What about the present system would you like to retain? Open to anything that is simple, value-added, and fair. Plan for Diocese to cover the required and true basics with their operating budget, then add items that support the mission priorities of the church. Set assessment rate and money needed based around this. “It can be a liberal mindset to want to be very responsible for getting value out of every \$ given to the church.” Transparency of the Diocesan budget and programs helps to provide positives around the assessment and its value.
6. What services are best provided at the diocesan level and paid for through the diocesan budget? The Bishop (especially Bishop Rickel, with his understanding of parish life and issues, and support to the clergy), basic things required canonically, finances office, Diocesan Convention.

They liked thinking that their assessment is used to support the larger church and other churches. Especially, meeting together with other congregations, and hearing how some of the smallest ones do real hands on outreach helps them to realize there is more than just writing (which is much easier to

them to do). They clearly noticed the recent assessment rate drops, and hope for more in a smart planned way. They enjoyed the chance to talk.

Holy Cross, Redmond, January 17, 2013

Jim Campbell met with the clergy and full Vestry of Holy Cross, Redmond at the start of their Vestry meeting. The energy of this group as they convened and readied for their meeting was something to see. The Vestry is a mix of people, about ½ under 40-45, the rest probably in their 60s. They opened their meeting with Evening Prayer, following by reading the 10 Rules of Respect from Bishop Greg around the group, before our discussions began.

I had met with this group in April, 2011 to discuss their long standing issue of not fully paying their assessment (since 2003, about \$225k total), imploring them at that time to figure out how to comply. I also offered that they should talk with other like size congregations to compare their budgets, staffing and programs and resources, and that they could comply if they paid off their Diocesan capital project loan from some of their savings, and used the monthly payments not going out for that to pay their assessment. This congregation since then has worked out things to fully pay their assessment in 2012 (almost \$70k), and participated fully in our Diocesan Comprehensive survey last year (more than any other church). So, tonight was a chance to review what their experience has been the past year with their finances that had a full assessment component (not just paying 10% of their real time revenues). The discussions were direct and brought out their concerns, while also sharing some goodness and some ideas.

First, I was asked about the Strategic Review Process, what is going on with it and where it is heading. I explained what I knew as a member of the Steering Team and how few parameters we are working with (very unlimited in what we can work on) to look at the future Diocesan mission and ministry (all of the people, churches, clergy and organizations and structures). I also explained how our Assessment Task Force was working to support this effort by reviewing various assessment systems and strategies around the Episcopal church and working with churches and people in our Diocese to pull together some recommendations for the Diocesan Council and Bishop to apply to any strategy for the Diocese' ministry going forward. I also handed out the summary information about the Diocesan budget and assessment formula we have agreed to use, and reminded everyone that we have a Diocesan webpage that has information about our work.

1. What is the role of the assessment in the life of your Church? Most of their congregation knows little about the assessment and the Diocesan piece of the Episcopal Church, although several folks do participate in Diocesan activities, including their clergy lately. It is looked on as a clear line item that stands out as a drag on their operating budget. This past year it really stood out as a larger monthly payment that challenged their overall ministry and budget, in going up by over \$27k for the year to make full payment. This church draws lots of younger families due to its location and emphasis on having great programs for families, which cost lots of money for staffing and resources. The treasurer stated that the assessment rate was too high, and eventually others chimed in to agree. (I did note that the assessment rate had been 23% in the early 1990s, but is now down to 20% in 2007 when Bishop Greg came, then 18%, and finally 17% now.) One Vestry member said that his wife has used Diocesan resources a lot over the years and is totally onboard with the value of the Diocesan staff and resources. Their church wants to fully participate in the Diocese, but emphasizes that their local efforts are of first importance to

them, and the assessment challenges being able to do this. They wondered how other congregations are able to do this, and I said that many others struggle, too.

2. When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features? Attributes—needs to be fair and that there is value in that the Diocese has valuable resources and programs. To some of the people there that is not real clear to be the case now, or at least it is not “advertised” well enough. A reasonable assessment to help the Diocesan level function to support congregations individually and together do ministry would be the ideal setup. Their focus is more on what they need to do locally, and how to get it done using their own resources in the best way possible. (An example is that they need to hire a new music ministry person, but with the coming health care benefits mandate for lay employees working 20 or more hrs, the cost for this employee jumps by upwards of \$15-25k, and makes it real hard to work newly or revised upward expenses for staff into the budget. This large assessment amount could be reduced and used to help with issues such as these.)
3. In what ways should the assessment take note of:
 - declining or increasing parish revenue Not discussed. Separately, it was mentioned that some mission churches that have not grown as expected and yet receive support from the Diocese should be reviewed and steps taken to either change things or stop supporting them.
 - congregation staffing expenses I suggested to them that maybe the priest in charge of a congregation salary and benefits might be deductible—not really much response to this. It was mentioned by the rector that having a program (reduced assessment or grants) to help with hiring new staff to develop programs in large churches would really help to move congregations forward (a program for this was done in the late 90s and early 2000s, and seemed to work well). (Aside: the rector noted that he feels the giving to that church by any paid clergy working in a congregation seems to be double assessed, because the revenues that pay the clergy are assessed, then the money given by that clergy also is assessable--in general.)
 - outreach expenditures Major support for this type of deduction—they especially believe that it provides a great incentive to do outreach ministries. It was brought up by the clergy that it should be worked out to allow for more in-kind outreach to be deductible (expenses for outside related to church overall ministry groups to use their facilities, work within the local community that involved hands on, and other expenses to the church, etc.) I mentioned that one church in the past had on their own taken deductions based on a formula that factored in expenses for outreach—building use costs, % of clergy time working on this, etc., and they responded that this should be applauded, not taken away—as the church sees real ministry getting done and this should be encouraged.capital expenditures—Present system is fine and encouraged.

Discussed the possibility of maybe a simple assessment formula, with little or no deductions and much lower rate. Not much support for this, as they feel tying their ministry and operations to deduction incentives in the assessment formula is a good thing. They responded that having no deduction for outreach could result in outside companies (in their case Microsoft) not providing funding for local programs the church does because it is not looked at as outreach clearly by having a deduction in the assessment formula for it. They believe the outreach and capital expense deductions are real incentives for churches to work in these areas, and should be retained.

4. What is the impact on your congregation of the current assessment system? They struggle to pay for more programs and staff as they grow and expand their ministry, and to do outreach when they are squeezed to pay a large assessment. There are a few direct benefits to their church from the Diocese (presence of the Bishop, support from some staff with youth programs Diocesan wide—although less lately, and they know their money helps other churches in need). Their past year was a major challenge to pay their full assessment, and it is not clear that it is sustainable, while trying to do the ministry they see the need to do locally. They did pay off their Diocesan loan and that helped to be able to pay their assessment at the end of the year. They also did contact other similar size/budget congregations and obtained some helpful information regarding looking at their own budget going forward.
5. What about the present system would you like to retain? Ensure it is fair and the Diocesan level programs it supports are value-added. Keep most present components of deductions as described above.
6. What services are best provided at the diocesan level and paid for through the diocesan budget? The Bishop, work of some of the staff in their areas, the Resource Center, camps. Needs mentioned by the Senior Warden and others were ways for church leaders to access useful information on the Diocesan website (or other place) to help with real practical church leadership issues and activities. Also, ways to connect with other church leaders to discuss common issues and opportunities and ideas/ways to do things that have worked—blogs, forums, wikis, etc.—that just get used to tie people around the Diocese together. The rector mentioned a practical way recently the Diocesan staff had helped—Rector inquired about any Diocesan land that was available to use for agriculture to grow crops for local food bank, which this church does now but wanted to expand. Bill Goodenough from the Diocese had nothing locally but there was noted some land near Bellingham that could be used. The Rector has contacted folks at St. Paul's, Bellingham and has gotten interest to do a similar crops program there as Redmond has.

It was mentioned that within the Eastside Region churches five of them are starting a combined youth retreat and that 16 from Holy Cross will be attending the upcoming one. Their view of the recent Diocesan Youth events is that they are dropping in support and attendance—not sure why.

They thanked me for coming and hope for good results from our work, and with the work of the Strategic Review team to get to a better focused ministry for the Diocese as a whole.

St. Aiden's, Camano Island, January 7, 2013

Barbara Fox and Candace McKenna: 21 parishioners attended at our meeting with St. Aiden's. The Senior Warden acted as host; the interim priest was absent due to illness.

Notes about this parish: St. Aiden's has four part-time paid staff. They will do a search for a new rector this year. The population at St. Aiden's is largely retired and people are more willing to give time – so money harder to give. Do not owe a dime – buildings all paid for. No reserve account for maintenance. They have a reputation as a warm and welcoming parish. 400 homeless families here in this community.

Introduction: Candace explained the work of the task force and the purpose of our meeting. She then introduced Barb and took notes the rest of the meeting.

Barb started by noting that Endowment funds pay for upkeep of Di house and Bishop's salary. She gave an overview of what the assessment goes for and talked briefly about the budget, noting the following categories of spending which factored later in the discussion as well:

National Church – 14.5% Bishop is also trying to work with the National Church and bring that rate down.

Program for Ministry – College for Congregational Development

Evangelism and Growth

Faith Formation – youth

Multi-cultural ministries

Emerging missions

Stewardship and development

Bishop's initiatives

Church in the World

Canonical expenses

Congregational Development – e.g., St. Aiden's got a grant for their SELAH services; process for getting the grant was tough, but the program is world class and they are very proud of it.

Diocese is pretty slim on Outreach – 2.2%– idea is that Outreach is done by the parishes.

Barb reviewed how it is determined what the assessment is: parochial report and deductions; lags by two years

1) What is the role of the assessment in the life of your Church?

Lot of money going to the diocese.

We think it can be better spent here. "It's a big deal." Only 4% of our money goes out for Outreach – it takes two full-time folks volunteering to manage even that. Wish they could do more.

"Dismayed and disheartened" about how little goes out from the Diocese to the community.

Diocesan Personnel committee considering proposing a mandate an unemployment benefit – there is strong opposition to another mandate to add the ones already imposed by the diocese on parishes: priest pension; housing, insurance benefits and salary.

2) When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features?

SELAH grant, DIF and attorneys for selling the properties are services that the church is using and has used.

Additional comments:

We don't know what you CAN do for us. Can you come teach us something. We don't know how you are using our assessment money.

We don't have the information about what grants might be available; could the diocese send someone to help us figure out what grants might make sense for us, although the delegates did say the information had been at convention.

We don't ask you for anything because we don't know we're there.

Don't avail themselves of the youth, education, and other programs. There is no youth population.

3) In what ways should the assessment take note of:

declining or increasing parish revenue

congregation staffing expenses
outreach expenditures
capital expenditures

Is there's a way to reflect the amount given for diocesan projects as credit toward the assessment (e.g. Mosquito nets)

Ideas for assessment taking note of the expenses and revenue categories in the question:

Tuition for Congregational Development should be deducted from assessed amount.

Give credit for maintenance reserve.

Credit on the assessment for volunteer hours. Perhaps when Outreach or Capital Improvement related?

7 AA meetings each week. Why can't we get credit for the outreach to groups that use the church.

Can the Diocese help attract youth – it's a problem that we are facing.

Do you have someone from the Diocese you can send to help us.

Diocese did send a "secret shopper" – we did everything he told us to do. We make a more concerted effort to greet people; we spent money on our sign. Haven't been able to improve guest parking.

4) What is the impact on your congregation of the current assessment system?

Like to think that they would do more Outreach if their assessment is lower.

Outreach fundraising: summer festival (rummage sale and bake sale and silent auction) raises \$6,000 (half to community/half back to the budget)

Four soup kitchens a year – feed on Tuesday night – they prepare and bring food.

1st Sunday is food bank Sunday.

With an older population, it's a strain to do all that needs to be done to keep a roof over our heads (hate to figure how many volunteer hours it takes), and then they feel like they have to really knock themselves out to get some funds for Outreach.

We give and give here. We work and work here. Then we get stuff from the diocese asking for more causes.

Sounds like it's not clear what is mandated – when they get requests for mosquito nets, and Haiti, it feels like it's never-ending asking from the Diocese.

Every time you go to church, you get dinged for money. Hard to attract folks that way.

Outreach is an attraction – folks come into the church because of what the church is doing.

5) What about the present system would you like to retain?

DIF, Convention, Leadership training including College of Congregational Development

6) What services are best provided at the diocesan level and paid for through the diocesan budget?

We can use better interaction with the diocese. Lack of communication between parish and diocese – why not have someone come once a quarter to a service – come and talk about the different initiatives from the diocese. They would like to see Diocesan staff be proactive about offering to come out.

We need the leadership from the diocese to help us come together.

Convention was actually very impressive and there's an impression that the diocese does have a lot to offer, but hard for delegates to come back and give it justice.

Would like to see the VOICE come back. PIE is the only communication they have with the bishop.

St. Andrew's Seattle, November 13, 2012

With parish rector and finance committee. Was asked to keep the meeting to 25 minutes; they didn't have questions about assessment or budget.

Large parish, high revenue, high expenses, doing major outreach work at former St. George parish location through their own initiative and help from the diocese.

Congregation really not cognizant of assessment paid or what they get from it; time lag is detrimental in a period when revenue is down. Hard to rationalize the parish needs and diocesan needs; they reduced staff dramatically in 2009; assessment is their second biggest budget item. They were going into a budget discussion and trying to figure out why they had a \$14,000 increase in assessment for next year. (I was a little surprised they hadn't ask that question before since the assessment rate will be the same and they didn't see a major increase in revenue. Referred them back to the preparation of their parochial report). They have a \$51,000 wish list in their budget that could be taken care of if not for the assessment.

Would like a more straight forward parochial report. They feel the need for better communication strategy from the diocese (websites are important). They see that benefit from the diocese in insurance; help with finances, help with legal services and human resources. Could use a list of vetted people who they could hire on contract for services.

St. Bede's, Port Orchard, December 1, 2012

1) What is the role of the assessment in the life of your Church?

Our contribution to work in the greater church – may come back to us in Diocesan programs or to the national church

Tax to ensure an adequate infrastructure – without our having to worry about the infrastructure

Supports corporate management of Diocese – manage money and property

Tithe from congregation to church at large – give graciously

Obligation of congregation – we are the Episcopal Church, not a congregational church

Bible calls for a communal life – see Paul receiving offerings for the poor in Jerusalem

Can be in a corner if cannot pay the Diocesan assessment in terms of fully participating in life of Diocese – vote at convention

2) When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features?

Puts resources where they are needed, e.g. Safeguarding God's Children

Provides us with leadership – Bishop and other staff

When priest and members of congregation are involved in the diocese there is a stronger sense of partnership

Get asked "What is the Diocese doing with our money?"

3) In what ways should the assessment take note of:

Declining or increasing parish revenue –

Current process penalizes congregations that are declining and favors growing churches – there were various suggestions for how assessments could be calculated

Should be based on income the previous quarter

Calculate on a more recent basis

Take estimated income and then adjust as real numbers are generated

Prior month times the assessment rate – exempt a certain amount for each congregation for cost of clergy which would follow the national church model that has an asking for each diocese less an allowance of the expenses of a Bishop

Assessment rate is regressive for small congregations because they spend a greater proportion of their income on assessable expenses

Congregation staffing expenses

This program allowed this congregation to call a priest

Outreach expenditures

If Outreach expenditures were assessed those offerings would be reduced by 50%

Capital expenditures

Keep the exemption. Encourages congregations to maintain facilities. In many instances, the diocese has title to this property.

4) What is the impact on your congregation of the current assessment system?

Assessments on grants difficult

Since our budget is growing the lag is beneficial. But, it isn't right.

5) What about the present system would you like to retain?

See above

6) What services are best provided at the diocesan level and paid for through the diocesan budget?

Stewardship training

Evangelism

Congregation development

Small congregations don't have the resources to provide specialized training.

7) What other comments or concerns do you have?

Help congregations have adequate treasurer

Adding grants into assessment base makes it difficult to pay with two year lag

Should the Diocesan Budget establish a reserve fund for capital improvement loans set at a fixed percentage of the budget?

Make the NDI report comprehensible

Psychologically it works best to have low stated rates

What is evangelism commission doing?

College for Congregation Development – what are the metrics for success?

Parishioners give \$25,000 for Outreach but it is unbudgeted and not accounted for in the General Fund accounting

The vicar does an annual compilation of the information in the Parochial Reports. He wonders whether attention is paid to aggregate results posted by congregations for each year.

St. James, Kent, January 2, 2013

Bill Montgomery met with the Rev. Marda Sanborn, Rector, and the Vestry of St. James prior to their monthly meeting. They were welcoming, interested, and participated well in the discussions.

1. What is the role of the assessment in the life of your Church? It's a burden that we have to meet every month. What do we get for our money?*(St. James and the Diocese) One comment was that it was taxation without representation, although they admitted that they sent delegates to convention. It's part of being Episcopalian. The amount does not allow us to do our job here in Kent. Two-year lag is a killer. Paying Diocesan Assessment is non-negotiable (Rector's position.) What do we get from Diocese?* The Rector answered the Vestry's questions on these, pointing out specific aid and Diocesan programs in which they participated.

2. When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features? Impacts parish greatly, but behind the scenes. Attendance of Bishop. Two teens to congregational development. Significant things. We recently used the Chancellor. Safeguarding God's children. Loans for elevator and for the furnace. Stewardship program. Evangelism conference. Tax that pays for things that we couldn't do for ourselves. Aid to other congregations.
3. In what ways should the assessment take note of:
declining or increasing parish revenue Calculate amount based upon current year.
congregation staffing expenses Flexibility is needed. We had to choose between paying staff salaries or paying the assessment.
outreach expenditures didn't like the disallowing of no cash outlay such as use of building, these costs should not be assessed. Really hurt us when change came.
 capital expenditures—present system is OK.
4. What is the impact on your congregation of the current assessment system? The two-year swing is a problem with declining revenue. We had to reduce program and had a reduction in staff.
5. What about the present system would you like to retain? The benefits. Retain diocesan resources. Retain downward movement of rate. Retain the capital improvements system. Our capital campaign was not assessed at full value. Outreach deduction is important.
6. What services are best provided at the diocesan level and paid for through the diocesan budget? The Bishop, the youth program, the stewardship program, the communication program, the Chancellor's office, support to clergy. They liked the opportunity to meet together with other congregations. They are thankful for everything the Diocese provides, but they want the assessment rate to go down. They said thanks for asking the questions.

St. Mary's, Lakewood, December 4, 2012

Rev. Bob Rhodes, reporter

- 1) What is the role of the assessment in the life of your Church?

Parishioners nothing

Tax – goes to a pool - assumption that something good is done – who knows what?

People do designate their funds from time to time to avoid assessment – Don't want money to go to diocese Some people felt the percentage was too high

If you are in an upcycle things work better. Down cycle with a two year lag is burdensome

Limits local ministry – cannot pay for mission at the local level

- 2) When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features?

Know very little about the diocese and its functions

Where is that money going? What is it for?

Diocese has provided help at times – finding an interim priest after Kent left

Sometimes Diocese seems not to care or offer their help

We had JYC which is supported by Diocese
Idea of the Bishop and Diocese is part of our heritage but the costs of such things like Diocesan House are unreasonable.

Using money to help smaller congregations share in a larger mission is good

3) In what ways should the assessment take note of:

Declining or increasing parish revenue – eliminate the two year lag

Congregation staffing expenses – It is helpful if the diocese can allow assessment relief for the establishment of new ministry positions.

Outreach expenditures – approve of the outreach exclusion for determining assessable income

Capital expenditures – yes encourages us to maintain our buildings – one person worried about using this for cosmetic changes or gilding the lily.

4) What is the impact on your congregation of the current assessment system?

Takes away from our capacity to support our local mission because of two year lag. Unsure of what the assessment provides

5) What about the present system would you like to retain?

See above

6) What services are best provided at the diocesan level and paid for through the diocesan budget?

Deployment system

Youth and camp programs

Administrative layer – accounting, insurance, etc

Care system for clergy

National church

7) What other comments or concerns do you have?

Use projections to calculate the assessment

We have received significant gifts from the diocese in the past 18 mos. Grateful for that

Congregation unfamiliar with what the Diocese does. How about a quarterly bulletin insert that focuses on some aspect of diocesan mission and life.

No one from Diocese has visited in 15 mos. since the interim priest arrived

Annual Reports are in a foreign language

What is the training for treasures and wardens?

How can the diocese can incentivize good behavior?

What about search costs? Is that a capital expense? Should some allowance be made for congregations.

St. Thomas, Medina, December 20, 2012

Meeting with Lex Breckinridge, Rector, two other clergy and several lay people. I was received warmly and we had a good meeting. After I thanked them for their time, they thanked me for what I was doing.

1) What is the role of the assessment in the life of your Church?

A. Assessment is viewed as a tax. We function basically as independent congregations. Need to improve relationships. Assessment needs to be integrated into mission.

B. What value do we receive from our contribution?

1. Need greater access to the Bishop, at least once a year.

2. Some programming not worthwhile. Making excellent disciples—canon for liturgy teaching us, but nothing new past the 70's. Same people over and over at all diocesan workshops
3. Done away with annual gathering of Church Treasurers. Treasurer felt that was a good program.
4. Have workshops for affinity groups such as workshops on stewardship for managers of the bookwork.
5. Safeguarding God's people. Children's program. Need a program. Call to Joan Anthony was not returned. Needs to be convenient for people. Required for licenses. Diocese should be more pro-active and not wait for squeaky wheel.
6. Stewardship includes responsibility. Questioned how much went to national.

2) When the assessment is playing its proper role in the life of your church, what are its attributes/characteristics/features?

- A. Diocese should be more aggressive in planning new missions. Greg is doing well in closing failing congregations, but where is the new growth? Coda was supported by us for a while. Show us the hope for the future.
- B. Stewardship and administration are areas neglected by Seminary and needed from Diocese for new priests. Integrate stewardship and assessment.
- C. Diocese does well: support for social media. Good support for insurance questions.
- D. Need more pro-active support on training

3) In what ways should the assessment take note of:

- A. Declining or increasing parish revenue—not a problem usually for us, but Diocese has helped us in the past.
- B. Congregation staffing expenses—a lower rate would help here.
- C. Outreach expenditures—we incorporated a separate entity called Project Outreach, so the assessment doesn't affect our outreach spending.
- D. Capital expenditures—should not be assessed.

4) What is the impact on your congregation of the current assessment system? Ninety percent of people have no idea. Others ask, what do we get for our money? Leadership challenge—we are not congregational. However, no one has complained about the assessment.

5) What about the present system would you like to retain?

- A. Process for parochial report has been becoming simpler and that's good.
- B. Two year lag may a point for review.
- C. Have a base that covers essentials and then give congregations a choice about where to invest the rest. Have a Missionary budget. Gives a much greater connection of congregation to the diocese. Regional meetings are incredibly boring. If they were used to allocate funds, they would be a more interesting and productive.
- D. Better now than it used to be as far as getting information.

6) What services are best provided at the diocesan level and paid for through the diocesan budget? Diocesan budget looks pretty lean right now. Children's formation support needed. Greg's doing a great job. Treasurer's needs are met. More education needed for major changes like health care.

7) What other comments or concerns do you have? If assessment was lower, we could do more at local level.

The required benefits are going to be a very expensive problem.