

ADOPTED
by the 131st Annual Convention
November 7, 2020



THE *Episcopal* CHURCH IN
WEST MISSOURI

2021

Plan For Ministry

Embracing the Change — The Episcopal Church in West Missouri



Dear sisters and brothers, fellow servants of Christ,

After hundreds of hours of administrative work by committees, commissions, and diocesan staff; after multiple meetings of our Diocesan Council and even more meetings of the Council's Finance Committee; and after three Deanery presentations, here it is: West Missouri's **2021 Plan for Ministry**.

On the surface of things, this may not seem to be a remarkable document. Very frankly, it looks much like last year's Plan for Ministry in all but a few details, and actually, that is intentional.

We are living through one of the most extraordinary periods in recent human history. It is certainly a first in my lifetime. During my 64 years, the world has not faced a global pandemic such as the SARS-CoV-2 virus and the widespread disease it causes (COVID-19). The reality of the disease pervades every aspect of life. It disrupts day-to-day routines. It conjures fear, especially among the most vulnerable to its ravages. It robs us of the simple joy of human closeness and contact. We've all felt its psychological effects, and so many more of its consequences. It has also shaken financial markets around the globe, caused widespread unemployment, and driven thousands of businesses under. It even closed our churches, which I never, ever envisioned would happen in my life or on my watch.

Because of all this — which I have only partially described — the diocese's financial leaders have chosen to present a conservative, prudent, yet hopeful Plan for Ministry. We are in a time of fiscal uncertainty at many levels. Will the giving to our congregations remain constant through the rest of 2020? How about 2021? Will giving fall off in 2022? How can the diocese position itself to be able to respond positively to the monetary needs of parishes and diocese if there is a turndown in giving or in investment markets? We see bright spots here, and potential gloom there. Markets recover, but unemployment rises. All this calls for prudence and a conservative approach to stewarding the resources of God that are, for the moment, in the care of The Episcopal Church in West Missouri.

The hopefulness in this Plan for Ministry is that we are able to stay the course and support the missional initiatives already begun:

1. providing aid to congregations for liturgical leadership, apostolic outreach, and evangelism,
2. growing our congregational capacities for Christian Formation,
3. encouraging and mentoring new leaders for a changing Church,
4. challenging clergy to grow spiritually and as leaders,
5. engaging ourselves and others on the issues of racism and racial justice,
6. resourcing deaneries to engage in ministries to their local contexts, and
7. increasing communications capacity that binds us by shared information and insight.

These missional priorities are intended to help us, to enable and equip us, for more effective ministry on Christ Jesus' behalf.

We are *The Episcopal Church in West Missouri*; we are its presence, its ministry, its workers, its arms, legs, hands, eyes, and ears. Our 47 parishes represent the work, mission, vision, and faith of *The Episcopal Branch of the Jesus Movement* in 36 municipalities, large and small, rural, suburban, and urban. Anyplace we are present, the Episcopal Church is present. Wherever we find ourselves, the Loving, Liberating, Life-giving Gospel of Jesus Christ our Lord is shared. In any locale, we stand for relationships characterized by *The Way of Love*.

The Way of Love! When we practice *The Way of Love* in our daily walks, when we Learn of God, Pray to God, Worship God, Bless one another, Go into the world, Rest and are re-created, and Turn again to God, we will grow in holiness. We will seek and find Christ even as he seeks us. Then, we will **Embrace the Change**, the transformation, the new and abundant life God so longs to give us.

Brothers and sisters, walk the *Way of Love* and *Embrace the Change*.

Many blessings,

+*Bishop Marty*



Operating Income Summary

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|--------------------------------------------------------------|------------------|------------------|------------------|-----------------------------|
| Operating income for all programs | | | | |
| A. Congregational Covenanted Portions (see page 5) | 1,200,724 | 1,224,503 | 1,229,784 | |
| Subtotal: A. Congregational Covenanted Portions (see page 5) | 1,200,724 | 1,224,503 | 1,229,784 | 63.31% |
| B. Investment Income (see page 6) | | | | |
| 1. Unrestricted Investments | | | | |
| a) Remfry & Shank Trusts (not included on page 6) | 124,225 | 180,000 | 180,000 | |
| b) Investments in DFMS Trust Funds | 229,108 | 275,756 | 278,916 | |
| c) Unrealized Gains (Losses) from DFMS | (74,202) | - | - | |
| 2. Campus Ministry Fund | 10,000 | 10,000 | 10,000 | |
| 3. Expansion Fund | 9,386 | 70,614 | 71,174 | |
| 4. Youth Ministry | 36,416 | 35,411 | 34,171 | |
| 5. Education & Training | | | | |
| a) Continuing Education | 837 | 990 | 984 | |
| b) Seminary and BKSM Training | 20,218 | 19,902 | 19,997 | |
| 6. Mission Work | | | | |
| a) International Mission Work | 2,220 | 2,187 | 2,200 | |
| b) Rural Mission Work | 31,210 | 30,756 | 30,927 | |
| 7. Hispanic Ministry | 645 | 635 | 639 | |
| Subtotal: B. Investment Income (see page 6) | 390,063 | 626,251 | 629,008 | 32.38% |
| C. Reserves & Council Designated Funds | | | | |
| 1. Diocese Wide Hispanic Ministry | 4,355 | 4,355 | 4,355 | |
| Subtotal: C. Reserves & Council Designated Funds | 4,355 | 4,355 | 4,355 | 0.22% |
| D. Other Income | | | | |
| 1. Northeast Episcopal Regional Ministry Assessment | 21,627 | 15,687 | - | |
| 2. Episcopal Churches of the Ozarks Regional Min. Assess. | 52,800 | 52,800 | 52,800 | |
| 3. South Youth Network Assessment | - | - | - | |
| 4. Cost Sharing Income (ELCA) | 24,900 | 24,000 | 24,000 | |
| 5. Miscellaneous Income | 19,605 | 2,500 | 2,500 | |
| Subtotal: D. Other Income | 118,932 | 94,987 | 79,301 | 4.08% |
| Total operating income for all programs | 1,714,074 | 1,950,096 | 1,942,447 | 100.00% |

Notes on Operating Income Summary:

Section A) Congregational Covenanted Portions – (Note: Operating Income is determined from the parish's parochial reports.) The Calculation Base is the lesser of (1) the average of the two prior year's Operating Incomes after the exclusion of outreach expense (also per parochial reports), OR (2) the Operating Income from the most recent year's parochial report less outreach expense. The calculation is 10.52% of the first \$50k, 11.37% of the next \$50k, 12.22% of the next \$50k, and 13.92% on anything over \$150k.

Section B) Investment Income – The Diocese annually receives a portion of the investment growth of the Remfry Trust and the Shank Trust (both administered by Bank of America/U.S. Trust). The remainder of the diocese's investments are held in the trust funds of the Domestic and Foreign Missionary Society (DFMS). Each fund's restricted or designated purpose is reviewed annually, and for 2021, the Diocesan Council proposes maintaining a draw of 5% of the average market value for the 4 quarters immediately prior to September 30, 2020 either to support the specified restricted or designated purposes (i.e. youth, campus, rural work, etc.) or for general operations.

Section C) Reserves & Council Designated Funds - Funds held specifically to support Hispanic Ministry will be for that designated purpose in 2021.

Section D) Other Income – After remitting their regular Covenanted Portions, the congregations of the Episcopal Churches of the Ozarks (EChO) remit an additional, annual, contracted Regional Assessment toward the funding of their regional minister's compensation, benefits, travel, and continuing education. Remittances from EChO also help to pay for additional, bi-vocational priests who provide sacramental, teaching, and missional leadership for the regional ministry's churches.

Section D4) Cost Sharing Income (ELCA) - Since January 2019, the Bishop and staff of the Central States Synod of the Evangelical Lutheran Church in America have occupied our Diocesan Center alongside our Diocesan Staff. They currently occupy the first floor offices, and both staffs share common spaces like the kitchenette, the conference room, storage rooms, and the lobby. This has enhanced the missional cooperation between our diocese and one of TEC's chief ecumenical partners.

Congregational Covenanted Portions -- 2020

| Parish or Congregation Name | 2015 Operating Income | 2016 Operating Income | 2017 Operating Income | 2018 Operating Income | 2019 Operating Income | Calculation Base for 2021 | 2021 Covenanted Portion |
|--------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|-------------------------|
| KC, All Saints | | | | | | - | - |
| Skidmore, St. Oswald's | 3,330 | 2,233 | 2,835 | 3,548 | 3,480 | 3,480 | 366 |
| Mt. Grove, Transfiguration | 15,617 | 8,426 | 10,557 | 7,565 | 9,046 | 8,306 | 874 |
| Savannah, St. Mary's | 9,874 | 6,600 | 12,313 | 10,410 | 9,876 | 9,876 | 1,039 |
| Clinton, St. Paul's | 15,505 | 8,575 | 14,732 | 10,182 | 11,673 | 10,928 | 1,149 |
| Trenton, St. Philip's | 12,273 | 15,122 | 10,805 | 12,435 | 11,514 | 11,514 | 1,211 |
| Fayette, St. Mary's | 26,566 | 16,063 | 15,139 | 13,317 | 16,132 | 14,725 | 1,549 |
| Boonville, Christ | 22,460 | 19,015 | 15,221 | 20,398 | 19,085 | 19,085 | 2,008 |
| Cassville, St. Thomas a Becket | 27,480 | 20,504 | 16,916 | 28,211 | 22,842 | 22,842 | 2,403 |
| Noel, St. Nicholas' | 13,033 | 15,127 | 26,384 | 21,830 | 24,198 | 23,014 | 2,421 |
| Neosho, St. John's | 23,694 | 26,492 | 23,582 | 26,476 | 25,349 | 25,349 | 2,666 |
| Monett, St. Stephen's | 36,842 | 33,048 | 36,460 | 35,018 | 27,223 | 27,223 | 2,864 |
| Bolivar, St. Alban's-Ozarks | 38,498 | 33,134 | 31,768 | 37,669 | 29,392 | 29,392 | 3,092 |
| Lexington, Christ | 33,484 | 38,602 | 33,618 | 38,224 | 36,453 | 36,453 | 3,834 |
| Kimberling City, St. Mark's | 58,931 | 55,734 | 56,043 | 58,108 | 38,254 | 38,254 | 4,024 |
| Harrisonville, St. Peter's | 49,630 | 50,224 | 44,157 | 40,018 | 38,711 | 38,711 | 4,072 |
| Ozark, St. Matthew's | 24,598 | 29,294 | 37,586 | 39,168 | 39,122 | 39,122 | 4,115 |
| Maryville, St. Paul's | 63,536 | 45,419 | 48,727 | 43,238 | 20,004 | 20,004 | - |
| Ex. Springs, St. Luke's | 73,413 | 63,546 | 66,279 | 43,000 | 51,901 | 47,451 | 4,991 |
| Chillicothe, Grace | 113,108 | 73,194 | 68,046 | 68,021 | 49,277 | 49,277 | 5,183 |
| Branson, Shepherd Hills | 34,334 | 51,120 | 51,364 | 55,926 | 57,450 | 56,688 | 6,020 |
| Nevada, All Saints' | 67,512 | 65,550 | 68,110 | 66,617 | 61,276 | 61,276 | 6,541 |
| Camdenton, St. George's | 127,770 | 105,292 | 81,524 | 77,444 | 65,008 | 65,008 | 6,966 |
| Warrensburg, Christ | 49,030 | 56,541 | 62,029 | 63,392 | 68,780 | 66,086 | 7,088 |
| Indep., St. Michael's | 83,721 | 100,918 | 88,889 | 74,766 | 69,161 | 69,161 | 7,438 |
| Raytown, St. Matthew's | 93,681 | 97,603 | 85,183 | 83,810 | 71,754 | 71,754 | 7,733 |
| West Plains, All Saints' | 85,254 | 52,656 | 58,466 | 60,415 | 85,191 | 72,803 | 7,852 |
| Lebanon, Trinity | 63,736 | 62,985 | 74,384 | 73,108 | 76,300 | 74,704 | 8,068 |
| Independence, Trinity | 130,662 | 127,309 | 119,437 | 113,120 | 115,812 | 114,466 | 12,711 |
| Lee's Summit, St. Anne's | 140,134 | 130,623 | 138,296 | 128,905 | 117,326 | 117,326 | 13,061 |
| Sedalia, Calvary | 89,847 | 101,353 | 115,804 | 120,356 | 138,463 | 129,410 | 14,537 |
| Lee's Summit, St. Paul's | 168,768 | 171,289 | 186,497 | 143,432 | 137,277 | 137,277 | 15,499 |
| Liberty, Grace | 206,060 | 211,523 | 208,998 | 170,543 | 147,959 | 147,959 | 16,804 |
| KC, St. Augustine's | 109,338 | 109,177 | 112,021 | 141,023 | 156,854 | 148,939 | 16,923 |
| Belton, St. Mary Magdalene | 161,514 | 117,049 | 243,592 | 150,536 | 165,403 | 157,970 | 18,162 |
| St. Joseph, Christ | 187,645 | 199,963 | 172,288 | 194,578 | 178,976 | 178,976 | 21,086 |
| Blue Springs, Resurrection | 179,453 | 169,097 | 200,234 | 163,757 | 196,796 | 180,277 | 21,267 |
| KC, St. Mary's | 179,346 | 220,843 | 193,214 | 171,928 | 200,214 | 186,071 | 22,074 |
| KC, St. Peter & All Saints' | 212,120 | 309,826 | 297,757 | 209,597 | 216,571 | 213,084 | 25,834 |
| Joplin, St. Philip's | 208,831 | 214,158 | 186,853 | 209,807 | 217,219 | 213,513 | 25,893 |
| Springfield, St. James' | 147,665 | 167,739 | 183,907 | 236,054 | 259,371 | 247,713 | 30,653 |
| KC, Good Shepherd | 231,021 | 253,042 | 224,699 | 241,777 | 268,963 | 255,370 | 31,719 |
| Springfield, St. John's | 238,358 | 238,775 | 252,649 | 257,158 | 273,931 | 265,545 | 33,135 |
| KC, Redeemer | 306,392 | 334,738 | 362,667 | 394,500 | 395,916 | 395,208 | 51,183 |
| Carthage, Grace | 466,390 | 451,287 | 434,476 | 486,567 | 493,142 | 489,855 | 64,357 |
| KC, St. Paul's | 793,545 | 680,200 | 735,713 | 702,754 | 672,963 | 672,963 | 89,843 |
| Springfield, Christ | 824,741 | 806,247 | 751,488 | 820,707 | 787,573 | 787,573 | 105,795 |
| KC, G&HT Cathedral | 1,735,676 | 1,608,630 | 1,814,963 | 1,917,668 | 1,688,174 | 1,688,174 | 231,148 |
| KC, St. Andrew's | 1,580,024 | 1,598,432 | 1,728,394 | 1,780,643 | 2,046,687 | 1,913,665 | 262,533 |
| TOTALS | \$9,564,440.00 | \$9,374,317.00 | \$9,805,064.00 | \$9,867,724.00 | \$9,914,042.00 | \$9,653,814.50 | \$1,229,784 |

Calculation

| | | |
|--------------------|--------|--------------|
| First 50k - 10.5% | 10.52% | \$ 5,259.38 |
| Next 50k - 11.4% | 11.37% | \$ 10,943.75 |
| Next 50k - 12.2% | 12.22% | \$ 17,053.13 |
| Above 150k - 13.9% | 13.92% | |

Notes:

The Operating Income columns for 2015, 2016 & 2017 are for historical reference only. Only the 2018 & 2019 columns are included when determining the Calculation Base.

Investment Income

| Purpose | Account Name | Account No. | 4 QTR Average | 2021 Budget Amount |
|--------------------------------------------|---------------------------------------------------------------------------|------------------|---------------------|--------------------|
| General | | | | |
| | 1077 WMO - Diocese - General Fund (2015) | 20-000-2881-5060 | \$ 1,562,477 | \$ 78,124 |
| | 1083 WMO - Other Fund (2015) | 20-000-2881-5066 | \$ 325,786 | \$ 16,289 |
| | 1085 WMO - Kate Leslie Bequest (2015) | 20-000-2881-5068 | \$ 103,156 | \$ 5,158 |
| | 1086 WMO - William Shank Trust (2015) | 20-000-2881-5069 | \$ 5,881 | \$ 294 |
| | 1087 WMO - John B Rust Trust (2015) | 20-000-2881-5070 | \$ 13,601 | \$ 680 |
| | 1088 WMO - Poindexter Fund (2015) | 20-000-2881-5071 | \$ 12,656 | \$ 633 |
| | 1091 WMO - Bidwell Fund (2015) | 20-000-2881-5074 | \$ 2,424 | \$ 121 |
| | 1094 WMO - McGuire (2015) | 20-000-2881-5080 | \$ 19,984 | \$ 999 |
| | 1120 WMO - St. Luke's Endowment (2015) | 30-000-5704-0000 | \$ 3,532,360 | \$ 176,618 |
| | Total General | | \$ 5,578,325 | \$ 278,916 |
| Christian Formation | | | | |
| | 1095 WMO - Diocesan College Work (2015) | 20-000-2881-5081 | \$ 248,348 | \$ 10,000 |
| | 1114 WMO - Diocese - Youth Ministry Fund (from Cliff Springs Sale) (2015) | 30-000-5704-0000 | \$ 683,428 | \$ 34,171 |
| | Total Christian Formation | | \$ 931,776 | \$ 44,171 |
| Clergy Formation | | | | |
| Gen'l Clergy Formation (New Clergy) | | | | |
| | 1084 WMO - Mabel Cave Bequest (2015) | 20-000-2881-5067 | \$ 28,883 | \$ 1,444 |
| | 1112 WMO - School for the Diaconate (2015) | 30-000-5704-0000 | \$ 13,699 | \$ - |
| | 1113 WMO - Elmquist Fund (2015) | 30-000-5704-0000 | \$ 280,112 | \$ 14,006 |
| | 1115 WNO - M. Shields Matheny Memorial Fund (2015) | 30-000-5704-0000 | \$ 33,921 | \$ 1,696 |
| Gen'l Clergy Formation (Any Clergy) | | | | |
| | 1110 WMO - Clergy Cont Education & SABB Endowment Fund (2015) | 30-000-5704-0000 | \$ 19,686 | \$ 984 |
| BKSM & Clergy Formation at BKSM | | | | |
| | 1107 WMO - West MO School for Ministry (2015) | 30-000-5704-0000 | \$ 57,027 | \$ 2,851 |
| Interim Ministry | | | | |
| | 1108 WMO - Dioc of West Mo - Interim Ministry (2015) | 30-000-5704-0000 | \$ 48,758 | \$ - |
| | Total Clergy Formation | | \$ 482,086 | \$ 20,981 |
| Mission | | | | |
| | 1093 WMO - Rust (2015) | 20-000-2881-5076 | \$ 618,536 | \$ 30,927 |
| | 1097 WMO - Expansion Fund - Diocese of West Missouri (2015) | 30-000-5704-0000 | \$ 1,423,473 | \$ 71,174 |
| | 1104 WMO - Church Growth 5th Start (2015) | 30-000-5704-0000 | \$ 12,775 | \$ 639 |
| | 1106 WMO - Georgiana King Restricted (2015) | 30-000-5704-0000 | \$ 43,992 | \$ 2,200 |
| | 1111 WMO - Seventh Start (2015) | 30-000-5704-0000 | \$ 23,114 | \$ - |
| | Total Mission | | \$ 2,121,889 | \$ 104,939 |
| Special Reserves | | | | |
| | 1090 WMO - Mary Miller Fund (2015) | 20-000-2881-5073 | \$ 1,044 | \$ - |
| | 1105 WMO - Episcopal Transition Reserve (2015) | 30-000-5704-0000 | \$ 260,007 | \$ - |
| | 1118 WMO - Diocese of West Missouri - Auto Replacement Fund (2015) | 30-000-5704-0000 | \$ 35,190 | \$ - |
| | Total Special Reserves | | \$ 296,241 | \$ - |
| | | TOTALS | \$ 9,410,317 | \$ 449,008 |

Operating Expense Summary

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|---------------------------------------------------------------|------------------|------------------|------------------|-----------------------------|
| <u>Operating expenses for all programs</u> | | | | |
| A. Congregational Life | | | | |
| 1. Congregational Development <i>(see page 10)</i> | 227,191 | 282,461 | 287,636 | |
| 2. Northeast Episcopal Regional Ministry <i>(see page 11)</i> | 84,577 | 44,059 | 1,000 | |
| 3. Episcopal Churches of the Ozarks <i>(see page 12)</i> | 143,810 | 152,822 | 154,869 | |
| <i>Subtotal: A. Congregational Life</i> | 455,578 | 479,342 | 443,505 | 22.83% |
| B. Christian Formation | | | | |
| 1. Campus Ministry <i>(see page 13)</i> | 4,338 | 10,000 | 10,000 | |
| 2. Youth Ministry <i>(see page 14)</i> | 145,662 | 150,057 | 149,588 | |
| 3. Christian Formation <i>(see page 15)</i> | 52,983 | 70,549 | 71,447 | |
| <i>Subtotal: B. Christian Formation</i> | 202,983 | 230,606 | 231,035 | 11.89% |
| C. Social Ministries <i>(see pages 16-17)</i> | 82,971 | 90,326 | 94,325 | 4.86% |
| D. Leadership Development <i>(see pages 18-19)</i> | 100,494 | 86,510 | 93,956 | 4.84% |
| E. Communications <i>(see page 20)</i> | 71,562 | 85,159 | 95,940 | 4.94% |
| F. Work of Deaneries <i>(see page 21)</i> | 54,133 | 77,000 | 77,000 | 3.96% |
| G. Administration & Governance <i>(see pages 22-23)</i> | | | | |
| 1. Administration | 437,813 | 464,127 | 476,138 | |
| 2. Governance | 12,510 | 6,500 | 11,000 | |
| 3. Support of the Larger Church | 252,124 | 239,446 | 225,875 | |
| 4. Bishop's Compensation | 185,938 | 191,080 | 193,674 | |
| <i>Subtotal: G. Administration & Governance</i> | 888,384 | 901,153 | 906,687 | 46.68% |
| Total operating expenses for all programs | 1,856,105 | 1,950,096 | 1,942,447 | |
| Total operating income for all programs | 1,714,075 | 1,950,096 | 1,942,447 | |
| <i>Subtotal: Net operating income/(loss)</i> | (142,030) | - | (0) | |
| Non-operating income/(loss) - <i>(see notes)</i> | 1,510,250 | - | - | |
| Total net income/(loss) | 1,368,220 | - | (0) | |

Notes on Expenses:

In the 2019 column, the dollar figure in the line item entitled "Non-operating income/(loss)" includes investment fund gain/(loss) not used to support operations as well as expansion fund income and interest income. The amount shown is the net amount after depreciation expense, and investment expense.

Staff Roster

| Name | Position | FTE | Staff Area |
|-----------------------------|--------------------------------------------------|------|------------|
| Mr. Gary Allman | Communications Director | 1.00 | Admin |
| The Rev. Anne Cheffey | Bi-Vocational Regional Ministry Developer (EChO) | 0.25 | Program |
| The Rev. Tim Coppinger | Regional Ministry Developer (EChO) | 1.00 | Program |
| Ms. Emily Davenport | Bishop's Executive Asst. | 1.00 | Admin |
| Ms. Jamillah Duckett | Events Coordinator | 0.50 | Admin |
| The Rev. Dr. Bill Fasel | Leadership Development | 0.25 | Admin |
| The Rt. Rev. Martin Field | Bishop Diocesan | 1.00 | Bishop |
| Ms. Elaine Gilligan | HR Administrator & Financial Asst. | 0.40 | Admin |
| The Rev. Chandler Jackson | Bi-Vocational Regional Ministry Developer (EChO) | 0.25 | Program |
| The Rev. Jerry Kolb | Chaplain to Retirees (North) | 0.10 | Program |
| Ms. Madison Kyger | Youth Network Coord. (South) | 0.38 | Program |
| The Rev. Paula Lively | Bi-Vocational Regional Ministry Developer (EChO) | 0.25 | Program |
| The Rev. Jerry Miller | Chaplain to Retirees (South) | 0.10 | Program |
| The Rev. Jose Palma | Hispanic Missioner | 1.00 | Program |
| The Rev. Dr. Steve Rottgers | Canon to the Ordinary | 1.00 | Program |
| Ms. Meredith Seaton | Youth Network Coord. (North) | 0.38 | Program |
| Ms. Kim Snodgrass | Christian Formation Coord. | 0.50 | Program |
| Mr. Josh Trader | Diocesan Youth Ministry Coord. | 1.00 | Program |
| Mr. Ron Weil | Finance Administrator | 1.00 | Admin |

Total = 11.35

Admin. = 4.15; Program = 6.2; Bishop = 1

Part-time staff = 11; Full-time staff = 8

Grants Available to Parishes

| Name of Grant or Program | Committee/Commission | Budget Amount | Page |
|---------------------------------------|----------------------------|-----------------|-------|
| Development of Existing Congregations | Congregational Development | 25,000 | 10 |
| International Outreach Grants | Social Ministry | 13,600 | 16-17 |
| Jubilee Ministries | Social Ministry | 4,200 | 16-17 |
| Internet advertising | Communication | - | 20 |
| Total = | | \$42,800 | |

Notes: This page is **informational only** and provides a synopsis of the grant opportunities for which parishes might apply. In the past, parish leaders have noted the difficulty of spotting grant opportunities scattered throughout the various sections of the Plan for Ministry. This table is to ease that difficulty. The 2021 budget does not include grants for aiding congregations with internet advertising.

Congregational Development

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|----------------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Congregational Development</u> | | | | |
| A. Share of Congregational Assessments | 138,443 | 146,619 | 161,306 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 32,184 | 62,391 | 67,956 | |
| 2. Church Growth 5th Start (Hispanic) | 645 | 635 | 639 | |
| 3. Expansion Funds | 7,040 | 52,961 | 53,380 | |
| C. Prior Year Reserves and Council Designated Funds | | | | |
| 1. Diocese Wide Hispanic Ministry | 4,355 | 4,355 | 4,355 | |
| Total operating income for Congregational Development | 182,667 | 266,961 | 287,636 | 14.81% |
| <u>Operating expense for Congregational Development</u> | | | | |
| A. Grants for Development of Existing Congregations | 500 | 25,000 | 25,000 | |
| B. Summer Church Summit | - | 2,000 | 2,000 | |
| C. Hispanic Ministry | 6,822 | 7,000 | 7,000 | |
| D. Canon to the Ordinary Travel | 8,838 | 11,500 | 13,000 | |
| E. Auto Replacement Fund | 3,500 | 4,000 | 4,000 | |
| F. Personnel Costs (salary, benefits, taxes) | 207,531 | 232,961 | 236,636 | |
| Total operating expense for Congregational Development | 227,191 | 282,461 | 287,636 | 14.81% |

Notes on Congregational Development expenses:

Section A) Grants for Development of Existing Congregations - Parish requests for financial assistance to support programs to enhance congregational vitality, evangelism, membership, or mission receive their grants from this program line item.

Section B) Summer Church Summit - These funds allow for a Summer Church Summit to engage speakers and provide development programs centered around the missional realities of ministering to our modern contexts: congregations large, small, and mid-sized in urban, rural, and small-town communities.

Section C) Hispanic Ministry – These funds support the diocese's outreach to and development of ministry with, among, and to persons whose first language is Spanish. Congregationally, this includes St. Nicholas, Noel and the Spanish-speaking congregation-within-a-congregation at Grace Church, Carthage. It also includes the ministry expenses of the diocese's Hispanic Missioner and development of other ministries designed to reach Hispanic individuals and communities in West Missouri. The Hispanic Missioner is a member of the Diocesan staff.

Section D) Canon to the Ordinary Travel - Canon to the Ordinary travel includes the following meetings outside the Diocese: DTM Spring Meeting (\$1,000), DTM Fall Meeting (\$1,000), Canon to the Ordinary Gathering (\$1,500), General Convention (\$3,500) and \$6,000 for "in diocese" travel.

Section F) Personnel includes the Canon to the Ordinary and the Hispanic Missioner, 2 full-time equivalents. If this proposed Plan for Minoistry is approved, the total compensation and benefits for the Canon to the Ordinary is proposed to be \$145,305.

Northeast Episcopal Regional Ministry (NERM)

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|----------------------------------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Northeast Episcopal Regional Ministry (NERM)</u> | | | | |
| A. Share of Congregational Assessments | 54,513 | 11,192 | - | |
| B. Investment Income | | | - | |
| 1. Proportional Share of Unrestricted Investment Income | 12,673 | 10,297 | - | |
| 2. Rust Fund (Rural Mission) | 12,175 | 6,883 | - | |
| C. Other Income | | | | |
| 1. Northeast Episcopal Regional Ministry Assessment | 21,627 | 15,687 | - | |
| Total operating income for NERM | 100,987 | 44,059 | - | 0.00% |
| <u>Operating expense for Northeast Episcopal Regional Ministry (NERM)</u> | | | | |
| A. Regional minister other costs | | | | |
| 1. Travel | 6,884 | 3,000 | - | |
| 2. Continuing education support | - | 250 | 1,000 | |
| B. Personnel (salary, benefits, taxes) | 77,693 | 40,809 | - | |
| Total operating expense for NERM | 84,577 | 44,059 | 1,000 | 0.05% |

Notes on Northeast Episcopal Regional Ministry expenses:

A new era has dawned in the Northeast Episcopal Regional Ministry. With the retirement of NERM's Regional Ministry Developer, member churches, while staying organized as a mutually supporting regional ministry, will arrange for sacramental and teaching ministries from among Resident Clergy plus the diocese's list of available Supply Clergy. Two of the congregations are led by clergy lifted-up from among their membership, one priest (St. Mary's, Fayette) and one deacon (Christ, Lexington). One person from Grace, Chillicothe is a nominee for priesthood. NERM's biggest challenge is to lift-up others who can serve in Holy Orders among the NERM congregations. All six congregations are active in their local ministerial alliances. Among them, they also support such ministries as homeless shelters, food pantries, meals-on-wheels, women's shelters, adopt-a-family, a community garden, and more. Without these small churches, vast areas of our diocese would have no Episcopal presence at all. With the elimination of the Regional Ministry Developer's position, NERM churches will no longer be paying an additional, annual, contractual remittance to the diocese to cover salary and benefits. While no expenses are anticipated, a place holder amount of \$1,000 has been included to cover any unforeseen issues that may arise. The 6 congregations in NERM include: Christ Church, Lexington; Christ Church, Boonville; St. Mary's, Fayette; St. Paul's, Clinton; Grace, Chillicothe, and St. Philip's, Trenton. Combined these 6 congregations have 159 active baptized members.

Episcopal Churches of the Ozarks (EChO)

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|-----------------------------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Episcopal Churches of the Ozarks (EChO)</u> | | | | |
| A. Share of Congregational Assessments | 92,696 | 40,433 | 34,805 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 21,549 | 35,716 | 36,337 | |
| 2. Rust Fund (Rural Mission) | 19,035 | 23,873 | 30,927 | |
| C. Other Income | | | | |
| 1. EChO Regional Ministry Assessment | 52,800 | 52,800 | 52,800 | |
| Total operating income for Episcopal Churches of the Ozarks | 186,080 | 152,822 | 154,869 | 7.97% |
| <u>Operating expense for Episcopal Churches of the Ozarks (EChO)</u> | | | | |
| A. Supply clergy | | | | |
| 1. Honorariums & travel reimbursements | - | 4,000 | 2,000 | |
| B. Regional minister other costs | | | | |
| 1. Travel | 14,649 | 10,500 | 12,500 | |
| 2. Continuing education support | - | 1,000 | 1,000 | |
| C. Personnel (salary, benefits, taxes) | 129,160 | 137,322 | 139,369 | |
| Total operating expense for Episcopal Churches of the Ozarks | 143,810 | 152,822 | 154,869 | 7.97% |

Notes on Episcopal Churches of the Ozarks expenses:

The Episcopal Churches of the Ozarks (EChO) Regional Ministry was officially formed in 2012 as a means to provide affordable priestly oversight to four congregations in the Southern Deanery. Occasionally, EChO's Regional Ministry Developer, Fr. Tim Coppinger, also offers support and aid to other congregations within the deanery. EChO churches have served as the training ground for candidates for ordination and newly ordained priests. As clergy numbers and parochial and diocesan resources are inadequate to provide a priest for every church, the number of trained and licensed lay ministers in positions such as Eucharistic Visitor, Preacher, and Worship Leader has increased. This has provided the added benefit of lay people willingly taking on leadership roles that have been traditionally seen as within the role of the priest. In some of the churches, the regular use of lay-led Morning Prayer and other daily offices has been reintroduced. Though having Holy Eucharist each Sunday is still highly desired, lay led worship continues to meet community's worshipping needs and the congregations have embraced periodic Holy Eucharists on days other than Sundays. Gatherings during the week to promote fellowship, ecumenical interaction, and community engagement through marketing, outreach, and evangelism have been held in all the churches. In an area where liturgical and sacramental denominations seek to provide a broader understanding of Christianity in the, challenging, predominantly conservative-evangelical Ozark culture, EChO maintains the Episcopal Church's presence largely because of the laity and clergy dedicated to the Episcopal branch of the Jesus Movement.

The 4 congregations in EChO include: St. Stephen's, Monett; St. Thomas a Becket, Cassville; St. Matthew's, Ozark; and St. Mark's, Kimberling City. Combined these 4 congregations have 106 active baptized members.

In addition to the Regional Assessment of \$52,800, EChO congregations will pay regular assessments in the amount of \$13,388 in the aggregate to cover their Covenanted Portions.

The diocesan cost above EChO's contractual Regional assessments is \$102,262 (total costs of \$155,062 less regional assessment of \$52,800) or \$25,565.50 per congregation.

Section C) Personnel includes the EChO Regional Ministry Developer and 3, bi-vocational Priests-in-Residence, which = 1.75 full-time equivalents.

Campus Ministry

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|---------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Campus Ministry</u> | | | | |
| A. Share of Congregational Assessments | 2,762 | - | - | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 642 | - | - | |
| 2. Diocesan College Work | 10,000 | 10,000 | 10,000 | |
| Total operating income for Campus Ministry | 13,404 | 10,000 | 10,000 | 0.51% |
| <u>Operating expense for Campus Ministry</u> | | | | |
| A. Campus Programs | | | | |
| 1. Campus Ministers & Peer Ministers | | | | |
| a) Springfield, Christ Church - MSU & Drury | 2,691 | 5,000 | 5,000 | |
| 2. Ministry Support | | | | |
| a) Springfield, Christ Church - MSU & Drury | 1,647 | 5,000 | 5,000 | |
| Total operating expense for Campus Ministry | 4,338 | 10,000 | 10,000 | 0.51% |

Notes on Campus Ministry expenses:

The Campus Ministry Community allows young adults to come together in community, learn more about the Church, and explore their faith through a variety of ways such as outreach, book/bible study, and music. Campus ministry gives the diocese an opportunity to reach an age group that is not well represented in the Church.

Section A1) Campus & Peer Ministers – Successfully providing an inviting environment of faithful Christian living through fellowship and learning involves investing a significant amount of time, creativity, and planning. Stipends are based on 10 hours a week for 16 weeks each semester.

Section A2) Ministry Support - Provides financial support for Christ Church, Springfield to offer ministry through which Episcopal young adults can stay connected to the Church, as well as to reach out to the young adults, faculty, and staff of local institutions of higher learning who seek spiritual growth, knowledge, and depth. This faith-based community provides opportunities: for personal growth through study and discussion; to grow in community and compassion through outreach activities at the local, diocesan, provincial, and national church levels; and to grow leaders within the local ministry.

Youth Ministry

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|------------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Youth Ministry</u> | | | | |
| A. Share of Congregational Assessments | 98,940 | 76,511 | 80,319 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 23,000 | 34,135 | 35,098 | |
| 2. Diocese - Youth Ministry Fund (from Cliff Springs Sale) | 36,416 | 35,411 | 34,171 | |
| Total operating income for Youth Ministry | 158,356 | 146,057 | 149,588 | 7.70% |
| <u>Operating expense for Youth Ministry</u> | | | | |
| A. Diocesan and Network Programs | | | | |
| 1. Youth Activities | 26,722 | 24,000 | 24,000 | |
| B. Continuing Education & Training | 6,200 | 9,500 | 9,500 | |
| C. Office and Administration | | | | |
| 1. Office & Communication | 5,669 | 3,500 | 3,500 | |
| 2. Travel | 9,047 | 5,400 | 5,400 | |
| D. Auto Replacement Fund | - | 4,000 | 4,000 | |
| D. Personnel Costs (salary, benefits, taxes) | 98,023 | 103,657 | 103,188 | |
| Total operating expense for Youth Ministry | 145,662 | 150,057 | 149,588 | 7.70% |

Notes on Youth Ministry expenses:

Section A1) Youth Activities The Youth Ministry Commission's (YMC) funding request seeks funds to support a variety of its ministry, the most obvious being the support of youth events. Over the course of 2021, the YMC will support: 3 Youth Ministry Commission meetings, a Senior High Retreat, a Junior High Retreat, a week-long summer camp (Camp WEMO) for all youth, a Happening (a cursillo-like event for teens), attendance at the Episcopal Youth Event (a week-long, church-wide gathering of high school youth sponsored by the General Church's Youth Ministries Office), the annual MissionPalooza (a youth in-service week), a Diocesan Youth Gathering (held in conjunction with the diocese's Annual Convention), and a Bishop's Ball (a festive celebration of those youth who have excelled in peer leadership). Funding from the Plan for Ministry offsets the cost of each event in order to: 1.) keep events affordable for youth and their families, 2.) provide shared transportation to and from events taking place across the breadth of the diocese, and 3.) offer scholarships (i.e. full or partial cost-sharing) to those who need additional assistance.

Section B) Education and Training allow us to offer quality continuing education for our volunteers and paid youth leaders. This may come in the form of online meetings, in-person gatherings, retreats, attending the FORMA and National Youth Workers Conferences and safeguarding updates. Funds are also used to reimburse the Assistant to the Bishop for Youth Ministry Development and the Regional Network Coordinators for travel expenses or rental vehicles to and from events and meetings. All three staff members working in this program area are available for congregational assistance.

Section C) Office & Communication - Besides providing the essential office supplies, diocesan resources allow for effective communication to equip youth and leaders, and those to whom they minister, with the resources needed to create dynamic, local ministries with youth. Ideally, these ministries result in people experiencing God and fully integrating into the life of their congregations.

Section D) Personnel includes the Youth Ministry Coordinator and two Regional Network Coordinators, equalling 1.75 FTE. The two Regional Network Coordinators are a vital components to the diocese's overall ministry plan for the WEMO Youth Community. Youth in congregations that do not have a regular youth fellowship look forward to filling the gaps between diocesan events with regional events where youth can connect with other youth and adults from their area. The Regional Network Coordinators frequently make the first impression people receive of our diocesan-level events and provide an easy introduction to larger, diocesan youth events.

Christian Formation

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|---------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Christian Formation</u> | | | | |
| A. Share of Congregational Assessments | 34,101 | 54,061 | 54,683 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 7,927 | 16,488 | 16,764 | |
| Total operating income for Christian Formation | 42,028 | 70,549 | 71,447 | 3.68% |
| <u>Operating expense for Christian Formation</u> | | | | |
| A. Program Costs | | | | |
| 1. Formation Resources | 1,939 | 4,200 | 3,700 | |
| 2. Hospitality | - | 1,000 | 1,500 | |
| 3. Internships | - | 12,500 | 12,500 | |
| B. Travel | 2,715 | 2,500 | 2,500 | |
| C. Personnel Costs (salary, benefits, taxes) | 48,329 | 50,349 | 51,247 | |
| Total operating expense for Christian Formation | 52,983 | 70,549 | 71,447 | 3.68% |

Notes on Christian Formation expenses:

The Christian Formation program empowers individuals, families, and congregations to embrace a diocesan-wide vision of growing Christian knowledge and building life-long faith.

Section A1) Formation Resources - Includes membership resources such as Sparkhouse, Leader Resources, and WingClips. These and other resources are compiled into a resource website for the use and aid of all congregations.

Section A2) Hospitality – Enables refreshments to be provided during opportunities for prayer, study, fellowship, and ministry development.

Section A3) Internships - Program and congregational support through internships and ministry consultants specifically in regards to children, family, intergenerational, and youth ministry. Connecting the dots between faith and life, beginning with our youngest members, makes church relevant and is vital to the health of our diocese.

Section C) Personnel includes the Assistant to the Bishop for Christian Formation Development, at .5 FTE.

Social Ministry

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|----------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Social Ministry</u> | | | | |
| A. Share of Congregational Assessments | 53,432 | 67,029 | 69,994 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 12,421 | 21,110 | 22,131 | |
| 2. Georgiana King Restricted (International Mission) | 2,220 | 2,187 | 2,200 | |
| Total operating income for Social Ministry | 68,074 | 90,326 | 94,325 | 4.86% |
| <u>Operating expense for Social Ministry</u> | | | | |
| A. Diversity & Reconciliation Commission | 4,357 | 6,000 | 10,000 | |
| B. Ecumenical Relations Commission | | | | |
| 1. Workshop on Christian Unity & Annual Meeting of EDEIO | 1,214 | 1,400 | 1,400 | |
| 2. Annual EDEIO Dues | 250 | 250 | 300 | |
| 3. Contribution to Missouri Faith Voices | - | 125 | 125 | |
| 4. United Methodist Church Full Communion Work | - | 500 | 500 | |
| C. Grants & Donations | | | | |
| 1. Episcopal Relief & Development | 2,500 | 2,500 | 2,500 | |
| 2. NourishKC | 30,000 | 30,000 | 30,000 | |
| 3. Council of Churches of the Ozarks | 30,000 | 30,000 | 30,000 | |
| 4. International Outreach Grants | 12,950 | 13,651 | 13,600 | |
| 5. Jubilee Ministries | - | 4,200 | 4,200 | |
| 6. Cursillo | 500 | 500 | 500 | |
| 7. Daughters of the King | 1,200 | 1,200 | 1,200 | |
| Total operating expense for Social Ministry | 82,971 | 90,326 | 94,325 | 4.86% |

Notes on Social Ministry expenses:

Section A) Diversity & Reconciliation Commission - *Resolution 2015-A182: Address Systemic Racial Injustice*, adopted by the 78th General Convention of The Episcopal Church, calls the wider Church to be in conversation and to take action on Racial Reconciliation and Justice. At the 79th General Convention in 2018, no fewer than 5 resolutions were approved that dealt with the many facets of anti-racism in the life of Church and society. The Catechism notes that the mission of the church is "to restore all people to unity with God and each other in Christ." The Church pursues its mission "as it prays and worships, proclaims the gospel, and promotes justice, peace, and love." This Diversity & Reconciliation Commission serves the diocese by 1.) calling the diocesan membership to intentional conversations that reveal systemic discrimination while also helping church leaders become more conversant and comfortable with these important issues. Workshops conducted by the commission facilitate individuals and congregations to process their feelings about racism and other forms of oppression in safety and in meaningful and practical ways to make change in their local community. The more people understand the attendant costs of division in the Body of Christ the more incentive they will have to overcome those divisions. Growing in compassion and love, seeing one another as brothers and sisters, and as partners in change, will help us heal communities.

Section B) Ecumenical Relations Commission - This line item supports 1.) the attendance of our Diocesan Ecumenical & Interreligious Officer at the 2021 National Workshop on Christian Unity & the Annual Meeting of the Episcopal Diocesan Ecumenical and Interreligious Officers (EDEIO); 2.) annual dues to EDEIO; and 3.) an annual Diocesan contribution to Missouri Faith Voices. The ecumenical and interreligious ministry of the Diocese empowers parishes by promoting effective collaboration with churches of other denominations with whom The Episcopal Church already has full communion agreements or with whom TEC is moving toward such agreements. This work directs us out of our Episcopal "silo" to recover the full unity of the Church and to work with non-Christian groups on common values of justice and peace.

Social Ministry

Section C1) Episcopal Relief & Development (ERD) - This supports the Church's major arm for responding quickly and energetically to disasters and economic development needs around the world.

Section C2) NourishKC - This organization provides social ministry programs in the greater KC metro area, especially related to hunger relief, food reclamation (gleaning) and direct services including the Kansas City Community Kitchen (KCCK), which each weekday provides freshly prepared and balanced meals to all who come for breakfast & lunch. NourishKC reports: "Our work cannot be done without the incredible support of The Diocese of West Missouri and the community. We use volunteers every day to serve lunch at KCCK in a 'restaurant style' food service where volunteers are hosts, waiters, bussers, beverage station attendants, etc. We obtain food through partners such as After the Harvest and Harvesters as well as Whole Foods, Farm to Market Bread, and HyVee. NourishKC serves nearly 150,000 hot, healthy meals annually."

Section C3) Council of Churches of the Ozarks - CCO offers an existing and efficient avenue for the Diocese of West Missouri's outwardly directed resources. The three Episcopal parishes that are active in CCO and part of the Southern Deanery, along with 69 other CCO member churches, have made the following impact on the community: 7,364 children; 35,560 seniors; 484 homeless women; and 71,164 food insecure people received services through CCO for a total of 114,572 people in the Southern Deanery receiving critical services; thus magnifying the gifts to make a larger, community-wide improvement of life for the most vulnerable in the Southern Deanery. The \$30,000 gift to CCO was leveraged to provide services including food, shelter, and clothing for an average of \$.30 per person.

Section C4) International Outreach Grants - Each year, the diocese sets aside 0.7% of its annual income to support international missions. Funds are available to WestMo parishes as matching grants of up to \$1,000 to support outside-the-US projects.

Section C5) Jubilee Ministry - Established as a ministry of the Episcopal Church in every diocese by the General Convention of 1982 (also requiring a Jubilee Officer in every Diocese), this line item provides for travel and training expenses for our Jubilee Officer to attend National Jubilee Ministry events. Jubilee Grants (to a max. of \$500) aid Jubilee Centers to help buy supplies & materials needed for outreach ministries.

Section C6) Cursillo - The Cursillo focuses on showing Christian laypeople how to become effective Christian leaders. Heartland Episcopal Cursillo is a joint ministry of the Dioceses of West Missouri and Kansas. Our local cursillo ministry donates \$1,000 in annual dues to TEC's Episcopal Cursillo Ministry (\$500 per Diocese) to support the program locally and internationally. Cursillo participants are encouraged to embrace a rule of life and to group frequently to support each other. Weekends are conducted annually to introduce people to the joy of Christian leadership.

Section C7) Daughters of the King - DOK exists to promote community, growing disciples, and evangelism through their use of the gifts of time and prayer. They annually maintain a prayer chapel at Diocesan Convention and lift the delegates and clergy in prayer throughout the business days. This donation also aids them in discernment classes for potential Daughters, travel for officers to church-wide DOK meetings, etc.

Leadership Development

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|------------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Leadership Development</u> | | | | |
| A. Share of Congregational Assessments | 64,719 | 27,746 | 33,136 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 15,045 | 20,218 | 22,045 | |
| 2. Clergy Cont ED & SABB Endowment Fund | 837 | 990 | 984 | |
| 3. Mabel Cave Bequest | 1,457 | 1,436 | 1,444 | |
| 4. West MO School for Ministry | 2,877 | 2,836 | 2,851 | |
| 5. Elmquist Fund | 14,172 | 13,943 | 14,006 | |
| 6. M. Shields Matheny Memorial Fund | 1,712 | 1,687 | 1,696 | |
| 7. Expansion Fund | 2,347 | 17,654 | 17,793 | |
| Total operating income for Leadership Development | 103,166 | 86,510 | 93,956 | 4.84% |
| <u>Operating expense for Leadership Development</u> | | | | |
| A. Support for Bishop Kemper School for Ministry | 36,000 | 36,000 | 36,000 | |
| B. COM Program Support | - | 1,000 | 2,000 | |
| C. Ordination Process | | | | |
| 1. Scholarship Aid | 3,600 | 7,540 | 12,600 | |
| 2. Background Checks | 778 | 360 | 300 | |
| 3. Psychological Exams | 1,905 | 2,525 | 3,000 | |
| 4. General Ordination Exams | 1,500 | 750 | 1,500 | |
| 5. Ordination Expenses | 1,398 | 1,500 | 1,500 | |
| D. Travel Costs | 1,477 | 2,000 | 2,000 | |
| E. College of Presbyters | 3,588 | 3,500 | 3,500 | |
| F. Community of Deacons | 325 | 1,200 | 1,200 | |
| G. Bishop's Day | 2,182 | 2,500 | 2,500 | |
| H. Diocesan Clericus and Clergy Wellness | 1,405 | 3,500 | 3,500 | |
| I. Personnel Costs (salary, benefits, taxes) | 46,338 | 24,135 | 24,356 | |
| Total operating expense for Leadership Development | 100,494 | 86,510 | 93,956 | 4.84% |

Notes on Leadership Development expenses:

Section A) Bishop Kemper School for Ministry (BKSM) began in 2013 as a collaboration between the Dioceses of West Missouri, Kansas, Western Kansas, and Nebraska. The first class consisted of 13 students on track to become deacons or priests in the four diocese. Since then the school has expanded to offer education and formation for those on track for ordination to the Presbyterate or Diaconate; formation and education for those seeking lay licenses; continuing academic formation for lay and clergy, such as in professional leadership development (Leadership Boot Camp), etc. Additionally, BKSM now trains students from the Evangelical Lutheran Church in America (ECLA) for enrollment as Pastoral Ministry Associates. This academic year (2020-2021) will have a total enrollment of 38 students.

Section B) COM Program Expense - This is for training members of the diocese to participate in vocational discernment. The estimate is for four training events with travel and materials costs of \$250 each.

Section C) Ordination Process - Scholarship Aid - Our diocesan policy is to cover 1/3 of the tuition costs (\$210 per course: one course each month) for our students at BKSM who are in academic tracks to receive completion certificates (for example, the priest or deacon track). We also provide the same amount (\$70/month) for our students at residential seminaries while they are in seminary. This is the amount we expect to pay for the academic year 2020-2021. Thus, it is also our best guess for the calendar year 2021.

Leadership Development

Sections E,F,H) College of Presbyters, Community of Deacons, and Diocesan Clericus - this line item supports the costs of these groups in order to keep down registration fees. The program content builds leadership skills among clergy and promotes cooperation, sharing and fellowship. The Community of Deacons line item includes travel costs for the Archdeacon or other deacons for meetings to support the Deacons ministry in the Diocese of West Missouri.

Section G) Bishop's Day w/ Wardens, Vestries, Treasurers, etc. is an annual leadership training event held to assist congregational lay leaders and clergy to know best practices for parochial governance and for missional visioning.

Section I) Personnel includes the Bishop's Ass't for Leadership Development and two Chaplains to Retirees, totally .45 FTE. The Chaplains to the Retired Clergy and Surviving Spouses provide pastoral care and oversight for retired clergy and surviving spouses located in the diocese on behalf of the bishop.

Communications

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|---------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Communications</u> | | | | |
| A. Share of Congregational Assessments | 46,108 | 65,257 | 73,430 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 10,719 | 19,902 | 22,510 | |
| Total operating income for Communications | 56,826 | 85,159 | 95,940 | 4.94% |
| <u>Operating expense for Communications</u> | | | | |
| A. Diocesan Website | 7,984 | 6,628 | 7,037 | |
| B. Ministry Support | - | 2,455 | 4,223 | |
| C. Episcopal Communicators Network | | | | |
| 1. Annual conference attendance | - | 1,840 | 425 | |
| 2. Membership & Dues | 75 | 150 | 150 | |
| D. Grants for Parochial Communications and e-Marketing | | | | |
| 1. Grants for internet advertising | 500 | 1,000 | - | |
| 2. Advertising and Marketing | - | 1,300 | 1,600 | |
| E. Travel | 2,661 | 2,920 | 5,136 | |
| F. Personnel Costs (salary, benefits, taxes) | 60,341 | 68,866 | 77,369 | |
| Total operating expense for Communications | 71,562 | 85,159 | 95,940 | 4.94% |

Notes on Communications expenses:

Section A) Diocesan Website - The diocesan websites are the central hub of the diocesan and parochial online connections with members and visitors. We currently support 33 websites for churches and key ministries, as well as host Four Wordpress Websites. The costs include some additional security software to keep our sites safe from hacking and malicious attacks. Included in 2021 is a provision to add a further 10 WordPress websites. This is part of a plan to replace Digital Faith which will reduce costs by a couple of thousand dollars a year.

Section B) Ministry Support - The ministry budget includes several software tools that support the work of multiple ministries within the diocese and tools to streamline production of promotional materials. Included here are our mailing service, image and video editing, and management applications, as well as social media monitoring and posting software. In 2021 this plan includes provisions for professional email and office software for up to 20 smaller churches so they can have more secure online communications. The plan also includes provisions for additional Adobe Creative Cloud license for Formation, as well as provisions for cleaning and maintaining cameras used for Diocesan Events.

Section C) Episcopal Communicators Network - The Episcopal Communicators Network is an invaluable resource for assisting the Communications Team and keeping us up to date on trends and initiatives, enabling us to advise churches in turn.

Section D) Advertising and Marketing - Social Media is no longer free. We need to advertise in order to get our message seen by more people, promoting both the Episcopal Church and our churches.

Section E) Travel - These funds are used to enable the Communications Director to attend key church and diocesan events and individual churches for training/site visits. It also includes a travel allowance to attend the ERD annual network meeting as well as the Episcopal Communicator's conference.

Section F) Personnel includes the Communications Director, a total of 1 FTE. In previous years, the Communications Director was .5 FTE, and a Communications Assistant was also .5 FTE. There is no longer a Communication Assistant, and the Director has been moved to full-time

Work of Deaneries

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|---------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Work of Deaneries</u> | | | | |
| A. Share of Congregational Assessments | 34,821 | 59,004 | 58,934 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 8,095 | 17,996 | 18,066 | |
| Total operating income for Work of Deaneries | 42,916 | 77,000 | 77,000 | 3.96% |
| <u>Operating expense for Work of Deaneries</u> | | | | |
| A. Program Costs | | | | |
| 1. Central Deanery | 16,289 | 25,000 | 25,000 | |
| 2. Northwest Metro Deanery | 17,500 | 25,000 | 25,000 | |
| 3. Southern Deanery | 17,500 | 25,000 | 25,000 | |
| B. Administrative Costs | | | | |
| 1. Central Deanery | 1,210 | 400 | 400 | |
| 2. Northwest Metro Deanery | 230 | 400 | 400 | |
| 3. Southern Deanery | 1,403 | 1,200 | 1,200 | |
| Total operating expense for Work of Deaneries | 54,133 | 77,000 | 77,000 | 3.96% |

Notes on Work of Deaneries expenses:

Section A) Program Costs - Each deanery is allotted funds to support deanery activities and grants for localized missional purposes, which in turn support other initiatives such as evangelism and outreach efforts in the community.

Section B) Administrative Costs - To assist with administrative costs (so they will not be born solely by the Deans' parishes), each deanery is allotted funds to help with mileage reimbursements, office supplies, mailing, etc. The Southern Deanery's administrative expenses are higher due to additional travel required of the Dean of that deanery to attend meetings.

Administration & Governance

| | 2019 Actual | 2020 Budget | 2021 Request | Percentage of 2021 Total |
|---------------------------------------------------------------------|----------------|----------------|-----------------|-----------------------------|
| <u>Operating income for Administration & Governance</u> | | | | |
| A. Share of Congregational Assessments | 580,191 | 676,651 | 663,177 | |
| B. Investment Income | | | | |
| 1. Proportional Share of Unrestricted Investment Income | 134,876 | 217,503 | 218,009 | |
| C. Other Income | | | | |
| 1. Rental Income from ELCA | 24,900 | 24,000 | 24,000 | |
| 2. Miscellaneous Income | 19,605 | 2,500 | 2,500 | |
| Total operating income for Administration & Governance | 759,572 | 920,654 | 907,686 | 46.73% |
| <u>Operating expense for Administration & Governance</u> | | | | |
| A. Administration | | | | |
| 1. Professional Fees | | | | |
| a) Audit Fees | 19,700 | 16,500 | 12,000 | 0.62% |
| b) Legal Fees | 12,377 | 7,000 | 7,000 | 0.36% |
| c) Bank & Paypal Fees | 987 | 1,050 | 1,610 | 0.08% |
| d) ACS Fees, Supplies & Training | 3,978 | 3,864 | 4,216 | 0.22% |
| e) ADP Payroll Processing Fees | 817 | 850 | 900 | 0.05% |
| 2. Non-compensation Insurance | | | | |
| a) Retired Bishop's Health Insurance | 12,900 | 13,868 | 7,560 | 0.39% |
| b) Clergy & Lay Group Life | 11,092 | 11,158 | 11,100 | 0.57% |
| c) Worker's Compensation Insurance | 2,224 | 3,076 | 3,076 | 0.16% |
| d) Property & Casualty Insurance | 17,082 | 16,100 | 17,000 | 0.88% |
| e) Key Person Insurance | 1,053 | 1,053 | 1,053 | 0.05% |
| 3. Diocesan Center Expenses | | | | |
| a) Utilities | 13,790 | 13,500 | 13,500 | 0.69% |
| b) Maintenance | 6,287 | 4,500 | 4,500 | 0.23% |
| c) Facility Repairs | 1,264 | 6,000 | 5,000 | 0.26% |
| d) Office Supplies & Equipment | 9,753 | 13,000 | 13,000 | 0.67% |
| e) Copy Machine Expense | 2,894 | 2,750 | 3,000 | 0.15% |
| f) Postage | 2,000 | 1,500 | 1,500 | 0.08% |
| g) Downtown KC Streetcar Assessment | 1,761 | 1,200 | 1,800 | 0.09% |
| h) The Episcopal Network for Stewardship (TENS) dues | - | 1,000 | 1,000 | 0.05% |
| i) Education for Ministry Sponsorship Fees | 1,750 | 1,750 | 1,750 | 0.09% |
| 4. Travel | | | | |
| a) Bishop Travel | 16,367 | 23,429 | 21,230 | 1.09% |
| b) Lay Administrative Staff Travel | 3,623 | 3,000 | 4,000 | 0.21% |
| 5. Reserves | | | | |
| a) Auto Replacement fund | 3,500 | 4,000 | 4,000 | 0.21% |
| b) Repair/Replace Diocesan Center Equipment | 3,000 | 3,000 | 3,000 | 0.15% |
| c) Episcopal Transition Fund | - | - | - | 0.00% |
| d) Assessment Underfunding | 44,952 | 55,000 | 83,354 | 4.29% |
| e) General Convention | 10,000 | 12,000 | 12,000 | 0.62% |
| f) Special Travel | - | 2,000 | 2,000 | 0.10% |
| 6. Springfield Apartment | 11,637 | 11,000 | 11,500 | 0.59% |
| 7. Miscellaneous Expense | 9,065 | 5,300 | 5,300 | 0.27% |

Administration & Governance

| | | | | |
|--------------------------------------------------------------------|----------------|----------------|----------------|---------------|
| B. Governance | | | | |
| 1. Diocesan Convention | | | | |
| a) Contracts & Arrangements | 9,567 | 4,000 | 8,000 | 0.41% |
| 2. Diocesan Council & Standing Committee | 2,942 | 2,500 | 3,000 | 0.15% |
| C. Support of the Larger Church | | | | |
| 1. General Church Assessment | 250,826 | 238,146 | 223,275 | 11.49% |
| 2. Province VII Assessment | 1,298 | 1,300 | 2,600 | 0.13% |
| D. Bishop Compensation (salary, benefits, taxes) | 185,938 | 191,080 | 193,674 | 9.97% |
| E. Administrative Personnel Costs (salary, benefits, taxes) | 213,959 | 225,679 | 219,188 | 11.28% |
| Total operating expense for Administration & Governance | 888,384 | 901,153 | 906,686 | 46.68% |

Notes on Administration & Governance expenses:

Section A2) Non-compensation Insurance - includes insurance benefits for retirees, lay and clergy group life, worker's compensation, property and casualty insurance, and key person insurance on the Bishop.

Section A3) Diocesan Center Expenses - This line item covers many costs of the Diocesan Office maintenance, operations and utilities, as well as the Diocese's portion of the Downtown KC Streetcar Assessment levied to the Cathedral. The Diocese also pays the membership fees to The Episcopal Network for Stewardship, which affords congregations access to their resources, and the Education for Ministry sponsorship fee, which allows each group in the diocese to participate at reduced costs.

Section A4) Travel - this amount supports travel and training not otherwise included in other program and travel expenses.

-----Bishop's travel includes the following meetings outside the Diocese: Spring House of Bishops (\$1,365), Bishop and spouse attending Living Our Vows II Retreat in Virginia (incl spouse, \$3,310), Seminarian Ordination (\$570), Episcopal Youth Evenet (\$1,610), Fall House of Bishops (incl spouse, \$1,805), Province VII Bishops & Spouses Retreat (incl spouse, \$2,830), Bishops of Small Diocese (incl spouse, \$1,600), BEST Conference Province VI & VII hosting (\$1,140) and \$7,000 for "in diocese" travel.

-----Lay staff travel includes the following conferences outside the Diocese: Episcopal Business Administrators Conference for the financial admin. staff and Bishop's Executive Secretaries Together for the Bishop's Assistant, as well as "in diocese" travel.

Section A5) Reserves - Current year funds set aside each year to cover future expenses.

Section A6) Springfield Apartment - This provides housing in Springfield for the Bishop, Canon to the Ordinary, or other staff member traveling for meetings, trainings or other purposes in the Southern Deanery in lieu of paying hotel expenses for each overnight stay. It also provides a base of operations and office space (with internet, printer, etc.) for staff to use between meetings or events even if no overnight stay is involved.

Section B1) Diocesan Convention - This line item provides funds for speakers, contracts, logistical needs, and other arrangements for the Annual Convention or Special Conventions of the Diocese of West Missouri.

Section C) Support of the Larger Church - This includes support of Province VII (our internal province of the 11 in The Episcopal Church) as well as the General Church. The General Church assessment is calculated this way: the diocese's 2019 Operating Income, minus a \$140,000 holdback, is then multiplied by 15%.

Section C2) Province VII Assessment - Province VII had been only asking for half of the assessment due to high reserves. In 2020 the decision was made to start asking Dioceses for the full assessment.

Section E) Administrative Personnel includes: 1.) the Events Coordinator, 2.) the Bishop's Assistant, 3.) the HR Administrator/Finance Ass't, and 4.) the Finance Administrator, equalling 2.9 FTEs.