

DRAFT
Approved by Diocesan Council
October 17, 2022



2023

Plan For Ministry



Bishop's Message 2022

It is an honor and a privilege to serve as your Bishop Provisional during this time in the history of The Diocese of West Missouri! I would like to share my thoughts on this Plan for Ministry, as well as what we are planning for the year ahead.

Diocesan leadership has been discerning, through listening and prayer, where the Spirit is moving the Diocese in terms of mission and ministry. One result of that discernment will be a budget that is aligned with our mission and ministry. We have made some headway this year, but we are not done yet.

For this Plan for Ministry, you will find an enhanced narrative to explain how the dollars and cents of the proposed budget correlate to our mission and ministry. To be better stewards of our resources, you will also see a reduction in the amount of the annual draw we take from our investments, an especially prudent step in this volatile economic landscape.

After Convention, beginning in December, we will outline the process for constructing the 2024 Plan for Ministry. Our goals include not only creating a zero-based budget process, but also a restructuring of the assessment formula. These things go hand in hand. We are committed to transparency in this process, so you can expect monthly updates in *From the Mission Field*, and regular updates in the *New Spirit* as to our progress. We will be seeking your input along the way, especially at the Deanery level, so that we can truly live into our mission together.

I am especially grateful to our Treasurer, Tom Kokjer, the Finance Committee, and the Finance Staff of the Diocese, especially Financial Administrator Ron Weil, for their hard work during the past year. If you have questions or concerns, please feel free to contact Tom, Ron, or me.

Faithfully,

+Diane

Treasurer's Message 2022

It is my privilege to serve as your diocesan treasurer. I am pleased to report that your diocese is in good financial shape. Although our long-term investments have declined this year as the equity and bond markets have retreated, our overall cash position is stronger versus a year ago. Overall operating revenues for our 47 churches are up slightly year over year reflecting to an extent the easing of socialization protocols. Diocesan expenses are under budget this year with moderating requests for assessment relief.

As mentioned above, because operating revenue overall is up, our apportionment revenue will be up about 1% or \$12k. Having sufficient liquidity will enable us to lower our standard (5%) draw in investments to 4.34% for PFM 2023. A lower draw during a market correction is a good thing. This budget incorporates a 3% cost of living increase and a 5.7% increase in healthcare insurance. Healthcare insurance increases have abated slightly this past year.

Our conservative approach to our finances during the pandemic has afforded our diocese an opportunity to expand our mission with stronger roots in which to grow from. Through lower expenses and COVID relief measures from congress and The Episcopal Church USA, the net effect has been to bolster resources for new/increased mission by over \$600k.

Your Diocesan Council, working with our Bishop Provisional, clergy, and churches, looks forward to discerning a revitalized missional purpose for the Episcopal Church in West Missouri. We are optimistic that, following the pandemic, our diocese's stronger financial position resulting from our cautionary stewardship will position us to pursue meaningful and aspirational work to accomplish the mission we know God has in mind for us to pursue

I would like to personally thank our finance staff, Ron Weil and Elaine Gilligan, the Finance Committee, Diocesan Council, and Bishop Diane for their time, advice, and counsel.

Tom Kokjer

Operating Income Summary

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
Operating income for all programs				
A. Congregational Covenanted Portions <i>(see page 5)</i>	1,229,784	1,196,561	1,208,394	
<i>Subtotal: A. Congregational Covenanted Portions (see page 5)</i>	1,229,784	1,196,561	1,208,394	63.27%
B. Investment Income <i>(see page 6)</i>				
1. Unrestricted Investments				
a) Remfry & Shank Trusts <i>(not included on page 6)</i>	233,062	180,000	180,000	
b) Investments in DFMS Trust Funds	273,195	345,956	345,800	
c) Unrealized Gains (Losses) from DFMS	110,334	-	-	
2. Campus Ministry Fund				
3. Expansion Fund				
4. Youth Ministry				
5. Education & Training				
a) Continuing Education	774	1,253	1,231	
b) Seminary and BKSM Training	19,973	24,255	23,588	
6. Mission Work				
a) International Mission Work	2,197	2,668	2,595	
b) Rural Mission Work	30,884	16,310	2,433	
7. Hispanic Ministry				
<i>Subtotal: B. Investment Income (see page 6)</i>	786,402	711,495	632,919	33.14%
C. Reserves & Council Designated Funds				
1. Diocese Wide Hispanic Ministry				
<i>Subtotal: C. Reserves & Council Designated Funds</i>	4,355	4,355	96	0.01%
D. Other Income				
1. Episcopal Churches of the Ozarks Regional Min. Assess.				
2. Cost Sharing Income (ELCA)				
3. Miscellaneous Income				
<i>Subtotal: D. Other Income</i>	77,288	68,500	68,500	3.59%
Total operating income for all programs	2,097,829	1,980,911	1,909,909	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.

Section C) Reserves & Council Designated Funds - Funds held specifically to support Hispanic/Latino Ministry will be for that designated purpose in 2023.

Section D1) 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 bi-vocational priests who provide sacramental, teaching, and missional leadership for the regional ministry’s churches.

Section D2) 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.

Section D3) Miscellaneous Income - This line item represents small amounts of income received during the year through payroll tax credits, unrestricted donations, etc.

Congregational Covenanted Portions -- 2023

Parish or Congregation Name	Deanery	2017 Operating Income	2018 Operating Income	2019 Operating Income	2020 Operating Income	2021 Operating Income	Calculation Base for 2023	2023 Covenanted Portion
Belton, St. Mary Magdalene	Central	243,592	150,536	165,403	182,041	187,814	184,928	21,915
Blue Springs, Resurrection	Central	200,234	163,757	196,796	167,291	212,217	189,754	22,586
Boonville, Christ	Central	15,221	20,398	19,085	14,105	21,937	18,021	1,896
Chillicothe, Grace	Central	68,046	68,021	49,277	65,832	63,080	63,080	6,746
Clinton, St. Paul's	Central	14,732	10,182	11,673	8,238	7,888	7,888	830
Ex. Springs, St. Luke's	Central	66,279	43,000	51,901	49,735	43,770	43,770	4,604
Fayette, St. Mary's	Central	15,139	13,317	16,132	13,049	8,519	8,519	896
Harrisonville, St. Peter's	Central	44,157	40,018	38,711	36,824	48,272	42,548	4,476
Indep., St. Michael's	Central	88,889	74,766	69,161	60,636	52,840	52,840	5,582
Independence, Trinity	Central	119,437	113,120	115,812	105,119	121,941	113,530	12,597
Lee's Summit, St. Anne's	Central	138,296	128,905	117,326	101,088	65,398	65,398	7,010
Lee's Summit, St. Paul's	Central	186,497	143,432	137,277	122,953	141,080	132,017	14,856
Lexington, Christ	Central	33,618	38,224	36,453	31,113	30,473	30,473	3,205
Raytown, St. Matthew's	Central	85,183	83,810	71,754	62,821	57,956	57,956	6,164
Sedalia, Calvary	Central	115,804	120,356	138,463	131,098	140,993	136,046	15,348
Trenton, St. Philip's	Central	10,805	12,435	11,514	6,013	9,160	7,587	798
Warrensburg, Christ	Central	62,029	63,392	68,780	67,121	76,036	71,579	7,713
KC, G&HT Cathedral	Northwest-Metro	1,814,963	1,917,668	1,688,174	1,647,350	1,703,694	1,675,522	229,387
KC, Good Shepherd	Northwest-Metro	224,699	241,777	268,963	231,908	266,606	249,257	30,868
KC, Redeemer	Northwest-Metro	362,667	394,500	395,916	307,665	359,884	333,775	42,632
KC, St. Andrew's	Northwest-Metro	1,728,394	1,780,643	2,046,687	1,902,092	1,913,433	1,907,763	261,712
KC, St. Augustine's	Northwest-Metro	112,021	141,023	156,854	142,880	143,536	143,208	16,223
KC, St. Mary's	Northwest-Metro	193,214	171,928	200,214	204,725	188,659	188,659	22,434
KC, St. Paul's	Northwest-Metro	735,713	702,754	672,963	689,489	728,917	709,203	94,887
KC, St. Peter & All Saints'	Northwest-Metro	297,757	209,597	216,571	324,448	202,746	202,746	24,395
Liberty, Grace	Northwest-Metro	208,998	170,543	147,959	150,336	158,550	154,443	17,672
Savannah, St. Mary's	Northwest-Metro	12,313	10,410	9,876	21,925	3,802	3,802	400
Skidmore, St. Oswald's	Northwest-Metro	2,835	3,548	3,480	6,251	6,453	6,352	668
St. Joseph, Christ	Northwest-Metro	172,288	194,578	178,976	152,967	143,784	143,784	16,294
Bolivar, St. Alban's-Ozarks	South	31,768	37,669	29,392	25,767	21,855	21,855	2,299
Branson, Shepherd Hills	South	51,364	55,926	57,450	53,954	58,576	56,265	5,972
Camdenton, St. George's	South	81,524	77,444	65,008	65,008	37,550	37,550	3,950
Carthage, Grace	South	434,476	486,567	493,142	464,383	490,455	477,419	62,626
Cassville, St. Thomas a Becket	South	16,916	28,211	22,842	23,074	25,219	24,147	2,540
Joplin, St. Philip's	South	186,853	209,807	217,219	176,914	210,237	193,576	23,118
Kimberling City, St. Mark's	South	56,043	58,108	38,254	43,916	42,703	42,703	4,492
Lebanon, Trinity	South	74,384	73,108	76,300	78,000	77,259	77,259	8,358
Monett, St. Stephen's	South	36,460	35,018	27,223	22,602	24,596	23,599	2,482
Mt. Grove, Transfiguration	South	10,557	7,565	9,046	3,521	6,207	4,864	512
Neosho, St. John's	South	23,582	26,476	25,349	17,955	12,203	12,203	1,284
Nevada, All Saints'	South	68,110	66,617	61,276	63,304	65,876	64,590	6,918
Noel, St. Nicholas'	South	26,384	21,830	24,198	18,136	24,420	21,278	2,238
Ozark, St. Matthew's	South	37,586	39,168	39,122	40,037	45,518	42,778	4,500
Springfield, Christ	South	751,488	820,707	787,573	831,705	780,005	780,005	104,742
Springfield, St. James'	South	183,907	236,054	259,371	244,485	288,365	266,425	33,258
Springfield, St. John's	South	252,649	257,158	273,931	242,959	310,186	276,573	34,670
West Plains, All Saints'	South	58,466	60,415	85,191	74,661	102,459	88,560	9,643
TOTALS		\$9,805,064.00	\$9,867,724.00	\$9,914,042.00	\$9,517,498.00	\$9,753,131.00	\$9,476,095.50	\$1,208,394

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 2017, 2018 & 2019 are for historical reference only. Only the 2020 & 2021 columns are included when determining the Calculation Base.

Investment Income

Purpose	Account Name	Account No.	09/30/21	12/31/21	03/31/22	06/30/22	4 QTR Average	2023 Budget Amount
General								
	1077 WMO - Diocese - General Fund (2015)	20-000-2881-5060	\$ 2,248,355	\$ 2,355,603	\$ 2,166,074	\$ 1,945,087	\$ 2,178,780	\$ 108,939
	1083 WMO - Other Fund (2015)	20-000-2881-5066	\$ 411,720	\$ 419,842	\$ 379,911	\$ 325,761	\$ 384,308	\$ 19,215
	1085 WMO - Kate Leslie Bequest (2015)	20-000-2881-5068	\$ 130,366	\$ 132,937	\$ 120,294	\$ 103,148	\$ 121,686	\$ 6,084
	1086 WMO - William Shank Trust (2015)	20-000-2881-5069	\$ 7,433	\$ 7,579	\$ 6,859	\$ 5,881	\$ 6,938	\$ 347
	1087 WMO - John B Rust Trust (2015)	20-000-2881-5070	\$ 17,189	\$ 17,528	\$ 15,861	\$ 13,600	\$ 16,044	\$ 802
	1088 WMO - Poindexter Fund (2015)	20-000-2881-5071	\$ 15,995	\$ 16,310	\$ 14,759	\$ 12,655	\$ 14,930	\$ 746
	1091 WMO - Bidwell Fund (2015)	20-000-2881-5074	\$ 3,064	\$ 3,124	\$ 2,827	\$ 2,424	\$ 2,860	\$ 143
	1094 WMO - McGuire (2015)	20-000-2881-5080	\$ 25,255	\$ 25,753	\$ 23,304	\$ 19,982	\$ 23,573	\$ 1,179
	1120 WMO - St. Luke's Endowment (2015)	30-000-5704-0000	\$ 4,464,106	\$ 4,552,164	\$ 4,119,209	\$ 3,532,082	\$ 4,166,890	\$ 208,345
	Total General		\$ 7,323,482	\$ 7,530,840	\$ 6,849,097	\$ 5,960,619	\$ 6,916,010	\$ 345,800
Christian Formation								
	1095 WMO - Diocesan College Work (2015)	20-000-2881-5081	\$ 318,393	\$ 325,325	\$ 295,021	\$ 254,229	\$ 298,242	\$ 8,000
	1114 WMO - Diocese - Youth Ministry Fund (from Cliff Springs Sale) (2015)	30-000-5704-0000	\$ 861,574	\$ 878,548	\$ 794,970	\$ 681,656	\$ 804,187	\$ 40,209
	Total Christian Formation		\$ 1,179,967	\$ 1,203,873	\$ 1,089,991	\$ 935,885	\$ 1,102,429	\$ 48,209
Clergy Formation								
Gen'l Clergy Formation (New Clergy)								
	1084 WMO - Mabel Cave Bequest (2015)	20-000-2881-5067	\$ 36,502	\$ 37,222	\$ 33,682	\$ 28,881	\$ 34,072	\$ 1,704
	1112 WMO - School for the Diaconate (2015)	30-000-5704-0000	\$ 18,610	\$ 19,162	\$ 17,520	\$ 15,237	\$ 17,632	\$ -
	1113 WMO - Elmquist Fund (2015)	30-000-5704-0000	\$ 353,972	\$ 360,954	\$ 326,624	\$ 280,069	\$ 330,405	\$ 16,520
	1115 WNO - M. Shields Matheny Memorial Fund (2015)	30-000-5704-0000	\$ 42,869	\$ 43,714	\$ 39,557	\$ 33,919	\$ 40,015	\$ 2,001
Gen'l Clergy Formation (Any Clergy)								
	1110 WMO - Clergy Cont Education & SABB Endowment Fund (2015)	30-000-5704-0000	\$ 26,361	\$ 26,895	\$ 24,352	\$ 20,884	\$ 24,623	\$ 1,231
BKSM & Clergy Formation at BKSM								
	1107 WMO - West MO School for Ministry (2015)	30-000-5704-0000	\$ 72,069	\$ 73,491	\$ 66,501	\$ 57,022	\$ 67,271	\$ 3,364
Interim Ministry								
	1108 WMO - Dioc of West Mo - Interim Ministry (2015)	30-000-5704-0000	\$ 66,236	\$ 68,200	\$ 62,357	\$ 54,233	\$ 62,756	\$ -
	Total Clergy Formation		\$ 616,619	\$ 629,638	\$ 570,592	\$ 490,245	\$ 576,773	\$ 24,819
Mission								
	1093 WMO - Rust (2015)	20-000-2881-5076	\$ 781,690	\$ 797,110	\$ 721,297	\$ 623,480	\$ 730,894	\$ 2,433
	1097 WMO - Expansion Fund - Diocese of West Missouri (2015)	30-000-5704-0000	\$ 1,938,566	\$ 1,996,046	\$ 1,810,685	\$ 1,560,170	\$ 1,826,367	\$ 28,309
	1104 WMO - Church Growth 5th Start (2015)	30-000-5704-0000	\$ 16,145	\$ 16,463	\$ 14,897	\$ 12,774	\$ 15,070	\$ 753
	1106 WMO - Georgiana King Restricted (2015)	30-000-5704-0000	\$ 55,596	\$ 56,693	\$ 51,300	\$ 43,988	\$ 51,894	\$ 2,595
	1111 WMO - Seventh Start (2015)	30-000-5704-0000	\$ 31,399	\$ 32,330	\$ 29,560	\$ 25,709	\$ 29,750	\$ -
	Total Mission		\$ 2,823,396	\$ 2,898,641	\$ 2,627,740	\$ 2,266,122	\$ 2,653,975	\$ 34,090
Special Reserves								
	1090 WMO - Mary Miller Fund (2015)	20-000-2881-5073	\$ 1,419	\$ 1,461	\$ 1,336	\$ 1,162	\$ 1,344	\$ -
	1105 WMO - Episcopal Transition Reserve (2015)	30-000-5704-0000	\$ 208,005	\$ 314,172	\$ 287,332	\$ 260,420	\$ 267,482	\$ -
	1118 WMO - Diocese of West Missouri - Auto Replacement Fund (2015)	30-000-5704-0000	\$ 69,886	\$ 71,958	\$ 50,430	\$ 31,433	\$ 55,927	\$ -
	Total Special Reserves		\$ 279,310	\$ 387,591	\$ 339,097	\$ 293,015	\$ 324,753	\$ -
		TOTALS	\$ 12,222,774	\$ 12,650,585	\$ 11,476,518	\$ 9,945,886	\$ 11,573,940	\$ 452,919

All draws are 5% with the exception of Diocesan College Work (2.7%), Rust Fund (.33%) and Expansion Fund (1.6%).

Operating Expense Summary

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating expenses for all programs</u>				
A. Congregational Life				
1. Congregational Development (see page 10)	143,984	122,831	93,060	
2. Hispanic Ministry (see page 11)	96,398	98,469	108,433	
3. Episcopal Churches of the Ozarks (see page 12)	45,132	58,310	44,433	
<i>Subtotal: A. Congregational Life</i>	285,514	279,610	245,926	12.88%
B. Christian Formation				
1. Campus Ministry (see page 13)	3,201	10,000	8,000	
2. Youth Ministry (see pages 14-15)	94,932	125,348	149,982	
3. Spiritual Formation (see page 16-17)	99,741	106,670	110,880	
<i>Subtotal: B. Christian Formation</i>	197,874	242,018	268,863	14.08%
C. Social Ministries (see pages 18-20)	80,954	90,740	109,034	5.71%
D. Vocations/Leadership Development (see pages 21-22)	76,040	98,012	103,199	5.40%
E. Communications (see page 23)	90,886	99,046	157,292	8.24%
F. Work of Deaneries (see page 24)	76,055	77,000	82,400	4.31%
G. Administration & Governance (see pages 25-27)				
1. Administration	384,731	615,282	452,698	
2. Governance	11,341	13,000	13,000	
3. Support of the Larger Church	225,871	221,325	206,960	
4. Bishop's Compensation	164,512	244,878	270,538	
<i>Subtotal: G. Administration & Governance</i>	786,455	1,094,485	943,196	49.38%
Total operating expenses for all programs	1,593,778	1,980,911	1,909,909	
Total operating income for all programs	2,097,829	1,980,911	1,909,909	
<i>Subtotal: Net operating income/(loss)</i>	504,051	-	0	
Non-operating income/(loss) - (see notes)	1,812,648	-	-	
Total net income/(loss)	2,316,699	-	0	

Notes on Expenses:

In the 2021 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	Explanation	FTE	Staff Area
The Rt. Rev. Diane M. Jardine Bruce	Bishop Provisional	Bishop of the Diocese and President of Council	1.00	Bishop
Ms. Emily Davenport	Bishop's Executive Asst.	Assists the Bishop and congregations	1.00	Admin
The Rev. Anne Cheffey	Bi-Vocational Regional Ministry Developer (EChO)	Southern EChO Missioner	0.25	Program
The Rev. Chandler Jackson	Bi-Vocational Regional Ministry Developer (EChO)	Southern EChO Missioner	0.25	Program
The Rev. Jerry Kolb	Chaplain to Retirees (North)	Provides pastoral care for retired clergy and spouses	0.10	Program
The Rev. Jerry Miller	Chaplain to Retirees (South)	Provides pastoral care for retired clergy and spouses	0.10	Program
Ms. Kim Snodgrass	Spiritual Formation Coord.	Develops ongoing formation resources	0.50	Program
Mr. Gary Allman	Communications Director	Social Media, websites, newsletters, translations	1.00	Admin
Pending	Communications Assistant	Assists Communication Director	0.50	Admin
Pending	Diocesan Missioner for Youth Ministry	Youth ministry	1.00	Program
Ms. Rachael Orth	Events Coordinator	Sets of meetings online and in person, catering, etc.	0.50	Admin
Mr. Ron Weil	Finance Administrator	Oversee day to day finances of the Diocese	1.00	Admin
The Rev. Jose Palma	Diocesan Missioner for Hispanic/Latino Ministry	Oversee Hispanic/Latino ministry for the Diocese	1.00	Program
Ms. Elaine Gilligan	HR Administrator & Financial Asst.	Bookkeeping, Human Resources, Insurance Specialist	0.40	Admin
The Rev. Charles "Chas" Marks	Diocesan Missioner for Transitions	Assists congregations and clergy in transitions	0.50	Program
The Rev. Charles Everson	Diocesan Missioner for Vocations	Oversees the ordination process	0.25	Admin

Total = 9.35

Admin. = 4.65; Program = 3.7; Bishop = 1
Part-time staff = 10; Full-time staff = 6

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	13,809	18-20
Jubilee Ministries	Social Ministry	4,200	18-20
Advertising & Promotion	Communication	1,600	23
	Total =	\$44,609	

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.

Congregational Development/Transitions

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Congregational Development/Transitions</u>				
A. Share of Congregational Assessments	113,841	23,532	45,486	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	89,776	32,613	26,343	
2. Expansion Funds	27,429	66,686	21,232	
Total operating income for Congregational Development/Transitions	231,045	122,831	93,060	4.87%
<u>Operating expense for Congregational Development/Transitions</u>				
A. Grants for Development of Existing Congregations	25,000	25,000	25,000	
B. Beginning Well Program	-	2,000	2,500	
C. Diocesan Missioner for Transitions Travel	2,716	13,000	13,000	
D. Auto Replacement Fund	4,000	4,000	-	
E. Personnel Costs (salary, benefits, taxes)	112,268	78,831	52,560	
Total operating expense for Congregational Development/Transitions	143,984	122,831	93,060	4.87%

Notes on Congregational Development expenses:

Section A) Grants for Development of Existing Congregations - Congregations 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) Beginning Well Program - This program is designed to bring together clergy who are newly ordained, new to a cure, or new to the Diocese for monthly mentoring, formation and fellowship with a mentor or mentors.

Section C) Diocesan Missioner for Transitions Travel - This line item is to cover travel for Diocesan Transitional Missioners' meetings as well as "in diocese" travel.

Section D) Auto Replacement Fund - In prior years this was used to ensure adequate funds were available for when the Canon to the Ordinary's vehicle needed to be replaced. With that position being open with no plans to fill, the \$4k will not be reserved in 2023.

Section E) Personnel includes the Diocesan Missioner for Transitions a .5 full-time equivalent. Up from .25 in 2022.

Hispanic/Latino Ministry

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Hispanic/Latino Ministry</u>				
A. Share of Congregational Assessments	77,341	67,194	76,877	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	89,776	26,145	30,707	
2. Church Growth 5th Start (Hispanic)	638	775	753	
C. Prior Year Reserves and Council Designated Funds				
1. Diocese Wide Hispanic/Latino Ministry	4,355	4,355	96	
Total operating income for Hispanic/Latino Ministry	172,110	98,469	108,433	5.68%
<u>Operating expense for Hispanic/Latino Ministry</u>				
A. Hispanic/Latino Ministry	4,473	7,000	7,000	
B. Lent Spiritual Retreat	-	-	2,000	
C. Day of the Virgin of Guadalupe	-	-	3,000	
D. Personnel Costs (salary, benefits, taxes)	91,924	91,469	96,433	
Total operating expense for Hispanic/Latino Ministry	96,398	98,469	108,433	5.68%

Notes on Congregational Development expenses:

Section A) Hispanic/Latino 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 Grace Church, Carthage. It also includes the ministry expenses of the diocese's Hispanic/Latino Missioner and development of other ministries designed to reach Hispanic/Latino individuals and communities in West Missouri. The Hispanic/Latino Missioner is a member of the Diocesan staff.

Section B) Lent Spiritual Retreat - To help build local community of Spanish speaking congregations, spirituality of individuals, praise, and knowledge of impact of a successful spiritual life.

Section C) Day of the Virgin of Guadalupe - A positive evangelism event that helps bring the local community together. Will work with the Hispanic/Latino and Anglo community within Grace Episcopal Church for planning, setup, and teardown.

Section D) Personnel includes the Diocesan Missioner for Hispanic/Latino Ministry, 1 full-time equivalent.

From the Rev. Jose Palma, head of the Hispanic/Latino Ministry

Section B) It will impact the hispanic parishes in a positive way to keep them involved in the church but also help others growing in there walk of faith. We would work with All Saints Episcopal Church and Hispanic ministry of Arkansas. All Saints would help with providing a location. Hispanic ministry of Arkansas would help with planning and spreading the word of the event.

Section C) This event provides a experience in a diversity of faith to the Diocese.

Episcopal Churches of the Ozarks (EChO)

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Episcopal Churches of the Ozarks (EChO)</u>				
A. Share of Congregational Assessments	98,752	-	-	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	49,512	-	-	
2. Rust Fund (Rural Mission)	-	16,310	2,433	
C. Other Income				
1. EChO Regional Ministry Assessment	42,000	42,000	42,000	
Total operating income for Episcopal Churches of the Ozarks	190,264	58,310	44,433	2.33%
<u>Operating expense for Episcopal Churches of the Ozarks (EChO)</u>				
A. Supply clergy				
1. Honorariums & travel reimbursements	-	2,000	2,000	
B. Regional minister other costs				
1. Travel	5,814	12,500	12,500	
2. Continuing education support	-	1,000	1,000	
C. Personnel (salary, benefits, taxes)	39,319	42,810	28,933	
Total operating expense for Episcopal Churches of the Ozarks	45,132	58,310	44,433	2.33%

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. EChO churches have served as the training ground for candidates for ordination and newly ordained priests. As clergy numbers and parochial and diocesan resources became 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 increased. This 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 was reintroduced. Though having Holy Eucharist each Sunday is always highly desired, lay led worship continued to meet community's worshipping needs and the congregations 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. Today, there are three congregations served by EChO ministries. Each have regular Sunday Holy Eucharists with regularly assigned clergy or supply clergy. Having the same clergy person present each week as led to stability within the congregations and allowed them to expand their work for God's Kingdom.

The 3 congregations in EChO include: St. Stephen's, Monett, St. Matthew's, Ozark, and St. Mark's, Kimberling City. Combined these 3 congregations have 97 active baptized members.

In addition to the Regional Assessment of \$42,000, EChO congregations will pay regular assessments in the amount of \$11,474 in the aggregate to cover their Covenanted Portions.

The diocesan cost above EChO's contractual Regional assessments is \$1,883 (total costs of \$43,883 less regional assessment of \$42,000) or \$628 per congregation.

Section A) Supply Clergy to cover stipends for supply clergy.

Section B) Regional minister other costs to cover travel and continuing education for bi-vocational and supply clergy.

Section C) Personnel includes 2, bi-vocational Priests-in-Residence, which = .5 full-time equivalents.

Campus Ministry

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Campus Ministry</u>				
A. Share of Congregational Assessments	246	-	-	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	123	-	-	
2. Diocesan College Work	10,000	10,000	8,000	
Total operating income for Campus Ministry	10,369	10,000	8,000	0.42%
<u>Operating expense for Campus Ministry</u>				
A. Campus Programs				
1. Peer Ministers				
a) Campus in Springfield, Warrensburg, and Kansas City	2,500	5,000	6,000	
2. Ministry Support				
a) Campus in Springfield, Warrensburg, and Kansas City	701	5,000	2,000	
Total operating expense for Campus Ministry	3,201	10,000	8,000	0.42%

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) Peer Ministers – Will provide funding for 6 college student peer minister positions for the Spring and Fall of 2023. (\$500 per semester) Students will help plan and implement outreach to college campuses in Springfield, Warrensburg, and Kansas City.

Section A2) Ministry Support - Will provide funding for selected campus ministry program expenses such as materials and refreshments.

From Alisa Carmichael, Chair of Campus Ministry

Section A1) Will promote intentional outreach on campus to college students, a population that is currently underserved in our diocese. Peer ministers will also help establish a welcoming, inviting presence for young adults who visit our parishes. Peer ministers will work with young adults to support other worship/service/outreach ministries within our parishes, as well as building collaborations with student organizations and service groups on campuses.

Section A2) Will provide support for new campus ministry growth and lessen the impact on individual parish budgets. Programming support at the diocesan level will help build a network of campus ministry resources, promoting cooperation and collaboration between parishes and avoiding duplication of services and siloed efforts.

Youth Ministry

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
Operating income for Youth Ministry				
A. Share of Congregational Assessments	92,480	55,146	67,341	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	46,368	28,839	42,432	
2. Diocese - Youth Ministry Fund (from Cliff Springs Sale)	34,171	41,363	40,209	
Total operating income for Youth Ministry	173,018	125,348	149,982	7.85%
Operating expense for Youth Ministry				
A. Diocesan and Network Programs				
1. Youth Activities	(1,342)	25,000	29,000	
B. Continuing Education & Training	976	7,500	12,000	
C. Office and Administration				
1. Office & Communication	7,623	4,000	1,500	
2. Travel	5,958	5,400	6,400	
D. Auto Replacement Fund	4,000	4,000	-	
E. General Convention Reserve	-	3,333	3,333	
F. Resource Material	-	-	2,500	
G. Ministry Assistants	-	-	2,500	
H. Personnel Costs (salary, benefits, taxes)	77,717	76,115	92,749	
Total operating expense for Youth Ministry	94,932	125,348	149,982	7.85%

Notes on Youth Ministry expenses:

Section A) Youth Activities - Creating and delivering both content and experiences that form youth in the Christian faith is essential to this ministry. We believe opportunities for fellowship, education, liturgy and service should be provided regularly; deepening a sense of community and building relationships. We propose this include a minimum of three to four in-person events such as a Diocesan Youth Event, Camp WEMO, Happening and Jr. High Retreat. Also, \$5,000 scholarship money is requested to make it possible for 10-15 youth to attend a group mission trips experience (similar to Missionpalooza). We anticipate expenses associated with online opportunities (i.e.guest speakers, materials, mailings) and Regional Gatherings (i.e. entrance fees)

Section B) Continuing Education and Training - The Youth Commission hopes to see opportunities for training, support and growth made available to the Youth Missioner, caregivers, volunteers, and clergy. Possible expenses include the Forma Conference, church-wide youth leader gatherings (registration, travel, hotel), Fall/Spring gatherings for volunteer continuing education/training, continuing education for caregivers and clergy, and resource materials for distribution.

Section C1) Office & Communication - Regular and timely communication with youth, parents/guardians, volunteers, and churches is vital to success. Communication and record keeping tools such as Formstack, creativity suites (Canva), etc. make communication possible.

Section C2) Travel - Traveling to churches, meetings with parents, volunteers, and clergy, and attending gatherings are in-person opportunities that nurture relationships and build trust. Additionally, gathering supplies is a necessary part of event planning, so this line item also includes reimbursing volunteer mileage upon request. The new Youth Missioner has been asked to spend a majority of Sundays each year visiting churches across the diocese to connect with youth, to publicly share about the work of diocesan youth ministry, and to engage the (potential or actual) youth ministry leaders in the local congregation.

Section D) Auto Replacement Fund - Established to have funds available when the youth van was ready for replacement. With the position currently open and youth events minimized due to the pandemic, the youth van is in the process of being sold and the proceeds will be held in the DFMS Investment account until it is determined a youth vehicle is once again needed.

Section E) General Convention Reserve - To set aside funds to cover youth travel and lodging for General Convention that is held every three years.

Section F) Resource Material - This line items allows for the Youth Missioner to curate a repository of immediately accessible formation materials not associated with a specific program or event (e.g. books, curricula), creating an opportunity to purchase and share helpful resources with youth ministry groups throughout the diocese.

Section G) Ministry Assistants - This line item helps make it possible for the Youth Missioner to put their time, skill, and energy in multiple directions, as opposed to being focused solely on event coordination.

Section H) Personnel includes the Youth Missioner equalling 1.00 FTE. This line item also includes \$6,000 for potential moving expenses for hiring new Youth Missioner.

Spiritual Formation

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Spiritual Formation</u>				
A. Share of Congregational Assessments	46,732	80,781	79,490	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	23,430	24,139	31,390	
Total operating income for Spiritual Formation	70,162	104,920	110,880	5.81%
<u>Operating expense for Spiritual Formation</u>				
A. Program Costs	46,908	-	-	
1. Internships	-	13,500	13,500	
2. Everything Holy	-	35,000	-	
3. Seasonal Projects	-	3,000	3,000	
4. Ministry to Children	-	-	11,300	
5. Training Workshops	-	-	15,000	
6. Annual Forma Conference	-	-	8,190	
B. Education for Ministry Sponsorship Fees	1,750	1,750	1,750	
C. Travel	37	1,000	1,000	
D. Personnel Costs (salary, benefits, taxes)	51,046	52,420	57,140	
Total operating expense for Spiritual Formation	99,741	106,670	110,880	5.81%

Notes on Spiritual Formation expenses:

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

Section A) Program Costs - The formation office *advocates* for people to engage in this life-long process with intentionality; *encourages* educational, service-oriented, fellowship experiences that naturally move us outside the walls of church buildings in the form of mission, outreach, inclusiveness, and evangelism; *promotes* healthy spiritual practices, relationships, and self-discovery; *provides* a companion presence to walk alongside households and congregations through this organic, life-giving, and holistic process and to do all in our power to support people in their life in Christ.

Section A1) Internships - Provides interns for diocesan ministries.

Section A2) Everything Holy - Changes made in the Everything Holy Project budget line reflect the Spiritual Formation Commission's desire to make curriculum, training, and resources available diocesan wide. Although survey results indicate the majority of people have found the Everything Holy project beneficial and would continue, we recognize it is a time-intensive and expensive line item that has a narrow audience. As conversation with Bexley-Seabury continues, we see the potential of the project being offered in another format and with a church-wide collaborative effort.

Section A3) Seasonal Projects - Funds for projects related to Lent, Advent, etc.

Section A4) Ministry to Children - Diocesan-wide access to curriculum and resources such as Weaving God's Promises, Illustrated Ministry, and Godly Play.

Section A5) Training Workshops - Online and in person training for Small Group Facilitation, Planning a Formative Year, Milestone Ministries, Living Compass, and Music Ministry.

Section A6) Annual Forma Conference - Vouchers to help congregations become members and have access to presentations during the annual Forma Conference. Not only will participants have access to respected leaders in the Christian Formation field, but also opportunities to build community.

Section B) Education For Ministry Sponsorship Fees -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 C) Travel includes funds to cover travel for the Spiritual Formation Coordinator.

Section D) Personnel includes the Spiritual Formation Coordinator, at .5 FTE.

From Kim Snodgrass, the Chair of the Formation Commission

Formational ministry efforts focus on 1) curated resources for Children, Youth, Young Adult, Adult and Intergenerational opportunity 2) development of a Formational Arc 3) Regular online posts and general communication and 4) Collaborative ministry through ministry consultants.

We are constantly being formed over time like a work of art. From a foundational perspective God's hands are always busy at the potter's wheel and every aspect of life is a spiritual matter and every shared ministry opportunity has the potential to be formational. It is intrinsically part of working together towards a common vision and fits with all diocesan ministry, especially when formative elements such as personal growth, understanding and cooperation are understood and acknowledged as a value that comes with being part of a faith community. Through ministry we put our faith into action; willing to be pliable clay, molded and shaped to become disciples and learners.

Social Ministry

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Social Ministry</u>				
A. Share of Congregational Assessments	57,185	67,195	75,575	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	28,671	20,877	30,864	
2. Georgiana King Restricted (International Mission)	2,197	2,668	2,595	
Total operating income for Social Ministry	88,053	90,740	109,034	5.71%
<u>Operating expense for Social Ministry</u>				
A. Diversity & Reconciliation Commission	14	6,000	25,000	
B. Ecumenical Relations Commission				
1. Workshop on Christian Unity & Annual Meeting of EDEIO	-	1,400	1,400	
2. Annual EDEIO Dues	300	300	300	
3. Contribution to Missouri Faith Voices	-	125	125	
4. United Methodist Church Full Communion Work	-	500	-	
C. Grants & Donations				
1. Episcopal Relief & Development	2,340	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	13,600	14,015	13,809	
5. Jubilee Ministries	4,200	4,200	4,200	
6. Cursillo	500	500	500	
7. Daughters of the King	-	1,200	1,200	
Total operating expense for Social Ministry	80,954	90,740	109,034	5.71%

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 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. The budget request for 2023 includes \$10k for speakers for the MLK & Absalom Jones celebrations, and \$5k for a pilgrimage for younger adults (20s thru 30s) to visit spots of historical significance in the Civil Rights Movement. Stops would potentially include Nashville, Sewanee, Birmingham, Montgomery, Selma, Jackson, and Memphis.

Social Ministry

Section B) Ecumenical Relations Commission - This line item supports 1.) the attendance of our Diocesan Ecumenical & Interreligious Officer at the 2023 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. 4) As the United Methodist Church has slowed down the process of potential full communion with the Episcopal Church, this item was taken out of the 2023 plan for 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 (KCCCK), 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 KCCCK 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.

Social Ministry

From Shirley Bolden, the Chair of the Diversity and Reconciliation Commission

Section A) Mandate 2015-A182: Address Systemic Racial Injustice of the 78th General Convention of The Episcopal Church calls the wider Church to be in conversation and take action on Racial Reconciliation and Justice. The fabric of faith communities is knit together by all. We make the teaching, wisdom, and ministry of Jesus Christ our cornerstone and believe a relationship with the Triune God is life-giving, experiential and transformational. 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." We need to have intentional conversations that unpack systemic discrimination, while also helping church leaders become more conversant and comfortable with these important issues. Our role as facilitators are to assist people and congregations in processing their feelings about racism and other forms of oppression in a safe place, and giving them meaningful practical ways to make change in their local community. The more people can understand the attendant costs of division in the Body of Christ and the more incentive they will have to come together 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 the communities.

The workshops are illuminating, humbling, gave a lot of historical context, and addressed the 'knee-jerk' reactions to the label of 'privilege' among others. We hope that everyone present come away with something to think about, and the knowledge and acceptance that there is a lot of work still to be done; both personally and institutionally. As we have the various workshops we have asked each participant to give the Commission an evaluation. Looking at the evaluations will assist us in the planning of future workshops. Questions asked: What is your overall assessment of the workshop? What topics or aspects of the workshop did you find most interesting or useful? Did the workshop achieve the objective? The Workshop helped me improve my commitment to working for reconciliation? Please tell us how we could improve? We will have more workshops with limits on participants so there will be more time for conversations. Working with Congregations to identify their areas of racism and how to irriate racism in our churches and communities. Also talking and working with areas that overlap with peace and justice issues that deal with racism. Our Commission will continue with a spring and fall workshops on "Undoing Racism", hopefully in person. We will have quest preachers for the Martin Luther King, Jr. Celebration and reception in January 2023, Absalom Jones Celebration and reception in February 2023. Activities for National Day of Racial Healing, Pride Month, Juneteenth. We are also looking at each parish and how they were established, i.e. how their property was purchased and who built their buildings. The intent to admit how much our church participated in slavery and other racial issues. How can we as a diocese reconcile the wrong that has been done in year past.

The Diversity and Reconciliation Commission will work with all other ministries to collaborate with publications, workshops and other means of communiations. As issues come forth, we will have articles for the Christian Formation, the New Spirit Youth Ministry and our Diocesan website; in particular during Martin Luther King, Jr. Celebration, Black History Month (with video presentations each week), Absalom Jones Celebration, and Juneteenth. We anticipate that other ministries will seek information from our commission as they encounter issues that relate to our work in the diocese. Our Commission is available to assist any of the other ministries that want to discuss or have activities that relate to diversity.

From the Rev. David Kendrick, head of the Ecumenical Relations Commission

Section B) The work of ecumenical relations supports the mission of the Church "to restore all people to unity with God and each other in Christ." (BCP Catechism, p. 855) As the United Methodist Church reconfigures itself, I look forward to a fruitful discission, and eventual implemtation, of the proposed full communion agreement that was first promulgated in 2019. Our membership and participation in Missouri Faith Voices fits the Social Ministry of this Diocese in its outreach to the needs of the world, patricularly in MO Faith Voices' advocacy for the powerless.

Vocations/Leadership Development

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Vocations/Leadership Development</u>				
A. Share of Congregational Assessments	49,191	27,724	42,068	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	24,664	22,550	29,235	
2. Clergy Cont ED & SABB Endowment Fund	774	1,253	1,231	
3. Mabel Cave Bequest	1,441	1,752	1,704	
4. West MO School for Ministry	2,846	3,459	3,364	
5. Elmquist Fund	14,000	16,988	16,520	
6. M. Shields Matheny Memorial Fund	1,693	2,057	2,001	
7. Expansion Fund	9,143	22,229	7,077	
Total operating income for Vocations/Leadership Development	103,753	98,012	103,199	5.40%
<u>Operating expense for Vocations/Leadership Development</u>				
A. Support for Bishop Kemper School for Ministry	36,000	36,000	36,000	
B. COM Program Support	-	1,000	3,000	
C. Ordination Process				
1. Scholarship Aid	7,516	15,000	12,600	
2. Background Checks	766	720	585	
3. Psychological Exams	5,265	5,400	2,472	
4. General Ordination Exams	1,500	1,500	4,500	
5. Ordination Expenses	838	2,000	1,500	
D. Travel Costs	-	1,000	4,000	
E. Clergy Retreats	-	3,500	7,000	
F. Community of Deacons	200	1,200	1,500	
G. Bishop's Day	-	2,500	-	
H. Diocesan Fellowship	1,890	3,500	-	
I. Personnel Costs (salary, benefits, taxes)	22,065	24,692	30,042	
Total operating expense for Vocations/Leadership Development	76,040	98,012	103,199	5.40%

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 and has added the Diocese of Missouri to the collaboration. This academic year (2022-2023) will have a total enrollment of 37 students.

Section B) COM Program Expense - This budget line item is to cover the costs of two vocations/discernment weekends which might include costs such as a speaker, lunch for the aspirants and COM members, etc.

Vocations/Leadership Development

Section C1) Ordination Process - Scholarship Aid - This is a proposal that increases the scholarship support for seminarians at residential seminaries. Last year's budget request was \$12,600. There are fewer students in both categories this year. The request is \$6,600 to continue supporting BKSM students at the same rate (one-third of \$180 per class), and an additional \$6,000 to support residential seminarians at \$1,500 per semester (up from \$350 per semester). Based on six semesters of residential seminary scholarships, and eleven students attending BKSM for the entire year.

Section C2) Background Checks -Based on seven background checks plus \$250 in reserve.

Section C3) Psychological Exams - Based on seven psychological exams plus \$500 in reserve.

Section C4) General Ordination Exams - BKSM Students previously did local canonical exams, and they will begin taking the GOEs. Based on six students.

Section C5) Ordination Expenses - To cover expenses related to ordinations such as Bibles, certificates and frames, bulletin copies, etc.

Section D) Travel Costs - Funds to cover travel costs for the Diocesan Missioner for Vocations

Section E) Clergy Retreats - This line item supports the costs of clergy retreats by helping to keep registration fees down.

Section F) Community of Deacons - This 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. has been transitioned into Leadership Essentials, a series of online classes covering the same subjects as were covered by Bishop's Day.

Section H) Diocesan Fellowship - funds to help cover or defer costs for Diocesan fellowship events such as Women's Retreat, etc.

Section I) Personnel includes the Diocesan Missioner for Vocations and two Chaplains to Retirees, totaling .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.

From the Venerable Bruce Bower, Archdeacon

Section F) Build community of deacons, recruit new postulants for the diaconate, etc. I expect to see collaboration with/from deaneries....to help priests and congregations recognize the ministry of the deacon, and to help grow our numbers in the community of deacons. Also, with better trained and happier deacons, we have a better chance of sending deacons across the diocese to occasionally assist in worship at church other than their home church.

Communications

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
Operating income for Communications				
A. Share of Congregational Assessments	50,421	76,258	112,757	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	25,280	22,788	44,535	
Total operating income for Communications	75,701	99,046	157,292	8.24%
Operating expense for Communications				
A. Diocesan Website	10,196	7,476	17,625	
B. Ministry Support	-	4,878	4,577	
C. Episcopal Communicators Network				
1. Annual conference attendance	-	425	425	
2. Membership & Dues	75	150	150	
D. Advertising and Promotion	185	1,600	1,600	
E. Translation & Interpretation Services	-	-	3,000	
F. Travel	3,012	5,530	6,690	
G. Personnel Costs (salary, benefits, taxes)	77,418	78,987	123,225	
Total operating expense for Communications	90,886	99,046	157,292	8.24%

Notes on Communications expenses:

Section A) Diocesan Website - The diocesan websites are the central hub of the diocesan and churches online connections with members and visitors. The diocese hosts 37 websites of which 31 are for churches (the remainder are diocesan and ministry sites). In 2023 this line includes \$10k for a one-off cost to update the main diocesan website and archive all the content therein.

Section B) Ministry Support - Provides the necessary tools needed by the Communications Director, Events Coordinator, Spiritual Formation and Youth missionaries and others supporting the work of the diocese and its churches. This budget item also includes provision for providing email and other support to the churches of the diocese.

Section C1) Episcopal Communicators Network Annual Conference Attendance - This 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 C2) Episcopal Communicators Network Membership & Dues - Provides support and resources to the Communications Director in their work.

Section D) Advertising and Promotion - Provides additional 'Communications reach' to selected ministries and programs within the diocese.

Section E) Translation & Interpretation Services - Covers expenses related to translation and interpretation of Diocese communications.

Section F) 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.

Section G) Personnel includes the Communications Director and part-time Communications Assistant, a total of 1.5 FTE.

From Gary Allman, the Communications Director

Section A) Provides a direct communications channel between the churches of the diocese, and the diocese and the churches, allows visitors and members alike to see what is happening within the diocese and the wider church. Provides a centralized and standardized set of resources for the churches. It provides a primary communications channel to inform members and the world at large the work being done in West Missouri. It communicates essential information to members.

Section B) Many of the diocesan staff rely on these tools and resources to perform their work. Some churches rely on these resources to conduct their day-to-day business.

Section C) A well informed Communications Director, with a skilled support network. Information is made available to other communicators within the diocese. The support received is shared with church communicators.

Section D) Promotion of events that would not get the attention they deserve. By promoting church events of interest to the wider community.

Section F) Without the travel budget the Communications Director would not be able to provide assistance at diocesan and church events, document the work of the diocese and churches, visit to provide on-site assistance. It also allows the Communications Director to attend the Episcopal Communicators Conference to gain insight into the work of communicators throughout the Episcopal Church. It further includes a provision to allow the Communications Director to attend an annual Episcopal Relief and Development meeting. Coverage and support of diocesan events, and in person support to churches. It provides direct support by enabling churches to share key events.

Work of Deaneries

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Work of Deaneries</u>				
A. Share of Congregational Assessments	50,790	59,284	59,054	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	25,465	17,716	23,346	
Total operating income for Work of Deaneries	76,255	77,000	82,400	4.31%
<u>Operating expense for Work of Deaneries</u>				
A. Program Costs				
1. Central Deanery	25,000	25,000	25,000	
2. Northwest Metro Deanery	25,000	25,000	25,000	
3. Southern Deanery	25,000	25,000	25,000	
B. Administrative Costs				
1. Central Deanery	92	400	800	
2. Northwest Metro Deanery	136	400	400	
3. Southern Deanery	827	1,200	1,200	
C. Deanery Picnics	-	-	5,000	
Total operating expense for Work of Deaneries	76,055	77,000	82,400	4.31%

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, meeting supplies, etc. The Southern Deanery's administrative expenses are higher due to additional travel required of the Dean of that deanery to attend meetings.

Section C) Deanery Picnics - To provide funds to allow Deanery Picnics in each deanery.

Administration & Governance

	2021 Actual	2022 Budget	2023 Request	Percentage of 2023 Total
<u>Operating income for Administration & Governance</u>				
A. Share of Congregational Assessments	579,844	713,302	649,746	
B. Investment Income				
1. Proportional Share of Unrestricted Investment Income	290,723	356,433	266,948	
C. Other Income				
1. Cost Sharing Income from ELCA	24,000	24,000	24,000	
2. Miscellaneous Income	11,288	2,500	2,500	
Total operating income for Administration & Governance	905,855	1,096,235	943,195	49.38%
<u>Operating expense for Administration & Governance</u>				
A. Administration				
1. Professional Fees				
a) Audit Fees	12,000	12,000	12,000	0.63%
b) Legal Fees	549	10,000	10,000	0.52%
c) Bank & Paypal Fees	2,189	1,850	2,250	0.12%
d) ACS Fees, Supplies & Training	4,218	4,400	4,500	0.24%
e) ADP Payroll Processing Fees	711	950	950	0.05%
2. Non-compensation Insurance				
a) Retired Bishop's Health Insurance	8,217	12,300	-	0.00%
b) Clergy & Lay Group Life	10,897	11,500	11,500	0.60%
c) Worker's Compensation Insurance	2,383	3,076	2,200	0.12%
d) Property & Casualty Insurance	12,217	19,500	19,500	1.02%
3. Diocesan Center Expenses				
a) Utilities	11,193	13,500	14,250	0.75%
b) Maintenance	3,280	4,500	4,500	0.24%
c) Facility Repairs	3,885	5,000	5,000	0.26%
d) Office Supplies & Equipment	8,667	16,000	16,000	0.84%
e) Copy Machine Expense	2,284	2,500	3,000	0.16%
f) Postage	1,081	1,500	1,500	0.08%
g) Downtown KC Streetcar Assessment	1,761	2,000	2,000	0.10%
h) The Episcopal Network for Stewardship (TENS) dues	1,000	1,000	1,000	0.05%
i) IT&S Support	600	-	7,200	0.38%
4. Travel				
a) Bishop Travel	5,122	21,230	21,230	1.11%
b) Lay Administrative Staff Travel	826	4,000	4,000	0.21%
5. Reserves				
a) Auto Replacement fund	4,000	4,000	4,000	0.21%
b) Repair/Replace Diocesan Center Equipment	3,000	3,000	3,000	0.16%
c) Episcopal Transition Fund	-	-	-	0.00%
d) Assessment Underfunding	36,064	85,000	55,000	2.88%
e) General Convention	12,000	12,000	12,000	0.63%
f) Special Travel	2,000	2,000	2,000	0.10%
g) Covid	-	122,711	-	0.00%
6. Springfield Apartment	10,058	11,500	-	0.00%
7. Miscellaneous Expense	5,386	5,000	4,705	0.25%

Administration & Governance

B. Governance				
1. Diocesan Convention	11,072	10,000	10,000	0.52%
2. Diocesan Council & Standing Committee	269	3,000	3,000	0.16%
C. Support of the Larger Church				
1. General Church Assessment	223,275	218,725	204,360	10.70%
2. Province VII Assessment	2,596	2,600	2,600	0.14%
D. Bishop Compensation (salary, benefits, taxes)	164,512	244,878	270,538	14.16%
E. Administrative Personnel Costs (salary, benefits, taxes)	219,145	223,265	229,412	12.01%
Total operating expense for Administration & Governance	786,455	1,094,485	943,195	49.38%

Notes on Administration & Governance expenses:

Section A1 - Professional Fees

Section 1a) Audit Fees - Fees for independent audit which is required by canon.

Section 1b) Legal Fees - Funds for legal expenses that are above and beyond the scope of Chancellor's work.

Section 1c) Bank & PayPal Fees - Covers bank fees and transaction fees for PayPal.

Section 1d) ACS Fees, Supplies, & Training - Fees associated with the ACS software used to track Diocesan finances and people database.

Section 1e) ADP Payroll Processing Fees - Fees for payroll processing software and end of year W-2s.

Section A2 - Non-compensation Insurance

Section 2a) Retired Bishop's Health Insurance - The Diocese covers the expense of health insurance coverage for retired Bishops and their spouses. Prior to 2022, the post-retirement subsidy offered to retired clergy often did not cover the full expense. In 2022 Church Pension Group converted to a Medicare Advantage plan which in many cases is now covered by the post-retirement subsidy.

Section 2b) Clergy & Lay Group Life – The Diocese provides group life insurance including Accidental Death and Dismemberment for qualified clergy in the amount of \$50,000 and for qualified lay employees in the amount of \$25,000. The Diocese provides group life insurance in the amount of \$3,000 for qualified retired clergy.

Section 2c) Worker's Compensation Insurance - Expense to provide worker's compensation coverage for the Diocesan Staff.

Section 2d) Property & Casualty Insurance - Expense to provide property & casualty coverage for the Diocese, including property, autos, and liability.

Section A3 - Diocesan Center Expenses

Section 3a) Utilities - provides funds to cover electric, gas, telephone, internet and water for the Diocesan center.

Section 3b) Maintenance - Provides funds to cover routine maintenance for the Diocesan center.

Section 3c) Facility Repairs - Provides funds for minor facility repairs for the Diocesan center.

Section 3d) Office Supply & Equipment - Provides funds for office supplies and equipment for Diocesan staff.

Section 3e) Copy Machine Expense - Provides funds for the office copy machine.

Section 3f) Postage - Provides funds for postage and postage meter leased. Postage meter is shared between Diocese and ECLA, which has reduced cost.

Section 3g) Downtown KC Streetcar Assessment - Provides funds for the assessment on the Diocese to fund the Downtown KC Streetcar.

Section 3h) The Episcopal Network for Stewardship (TENS) dues - Covers the subscription to TENS that can be used by anyone in the Diocese for their annual stewardship campaigns, including graphics, sample letters, forms, bulletin inserts, etc.

Section 3i) IT&S Support - Provides funds to cover IT&S setup, maintenance, and repair issues.

Administration & Governance

Section 4 - Travel

Section 4a) Bishop Travel - provides funds to cover travel outside the Diocese for events such as House of Bishops, Consecrations, etc. as well as "in diocese" travel.

Section 4b) Lay Administrative Staff Travel - provides funds for conferences outside the diocese such as Bishop's Executives Secretaries Together (BEST), Episcopal Business Administrators Conference (EBAC), etc. as well as "in diocese" travel.

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

Section 5a) Auto Replacement Fund - Fund to provide adequate money for replacement of Bishop's vehicle.

Section 5b) Repair/Replace Diocesan Center Equipment - Fund to provide for major repairs & replacement of equipment located in Diocesan Office.

Section 5c) Episcopal Transition Fund - Fund to provide coverage for expenses associated with searches for new Bishops. This fund is currently well funded and this is a placeholder item for when further funding is needed.

Section 5d) Assessment Underfunding - Funds for use by Assessment Review Committee to provide Assessment Relief to congregations/missions in financial distress.

Section 5e) General Convention Reserve - Fund set aside to cover travel expenses for delegates representing the Diocese at General Convention every three years.

Section 5f) Special Travel - Fund set aside to cover travel expenses for seldom held events such as Lambeth Conference.

Section 5g) Mission Fund (Formerly Covid Fund) - 2022 budget surplus set aside for future Mission opportunities.

Section A6) Springfield Apartment - Previously used for lodging for Bishop and Canon to the Ordinary in Springfield, as of April 2022 the diocese is allowing Christ Church Springfield to take over the payment of the apartment for use by the Interim Rector at Christ Church. The lease is still under the name of the Diocese of West Missouri.

Section A7) Miscellaneous Expense - Funds to cover minor expenses that are not covered elsewhere.

Section B) Governance

Section B1) Diocesan Convention - Funds to help cover expenses associated with annual Diocesan Convention.

Section B2) Diocesan Council and Standing Committee - Funds to help cover expenses associated with Diocesan Council and Standing Committee meetings.

Section C) Support of the Larger Church

Section C1) 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 2021 Operating Income, minus a \$200,000 holdback, is then multiplied by 15%.

Section C2) Province VII Assessment - Annual assessment to support the work of Province VII.

Section D) Provisional Bishop Compensation - Includes salary, medical benefits and pension for Bishop Provisional.

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.