

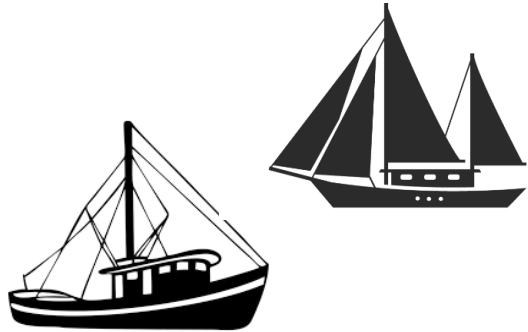
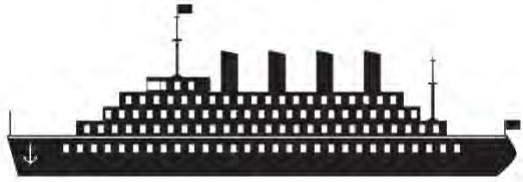
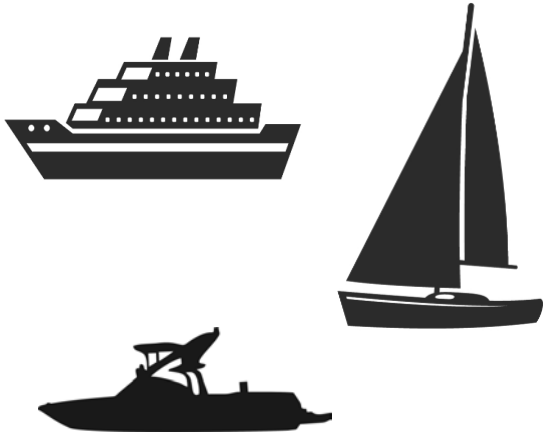
# THROUGH ALL KINDS OF WEATHER

**What inspires congregations to make sound financial  
management a priority?**









# A System of Integrated Support



Transparency and Accountability

Frameworks for Understanding

Data-driven Decisions

Circle of Communication

Anticipated Impact

# Transparency and Accountability



You wouldn't board unless you knew: Who's driving the boat and where are we going?



# Transparency and Accountability

## Canon Law for Parochial Reporting

*TEC Title I Canon 6.1: Of the Mode of Securing an Accurate View of the State of This Church*

A report shall be prepared annually in the form authorized by Executive Council,... shall be filed not later than **March 1** with the Bishop of the Diocese.

*Diocesan Canon VIII.3.a-l:*

No later than **March 1** of each year, the Congregation shall file an annual report, including the parochial report, vestry and delegate listings, and other information requested by Diocesan Council.

## Constitution

and

## Canons

together with

## The Rules of Order



For the governance of the Protestant Episcopal Church in the United States of America, otherwise known as

## The Episcopal Church

Adopted and Revised in General Conventions 1789–2018

## Canon Law for Audits

*TEC Title I Canon 7.1f: Of Business Methods in Church Affairs*

All accounts of Parishes, Missions shall be audited annually by an independent CPA or such audit committee as shall be authorized by the diocesan authority.

All reports of such audits, including any memorandum issued by the auditors or audit committee regarding internal controls or other accounting matters, together with a summary of action taken or proposed to be taken to correct deficiencies or implement recommendations contained in any such memorandum, shall be filed with the Bishop or Ecclesiastical Authority not later than 30 days following the date of such report, and in no event, not later than **September 1** of each year, covering the financial reports of the previous calendar year.

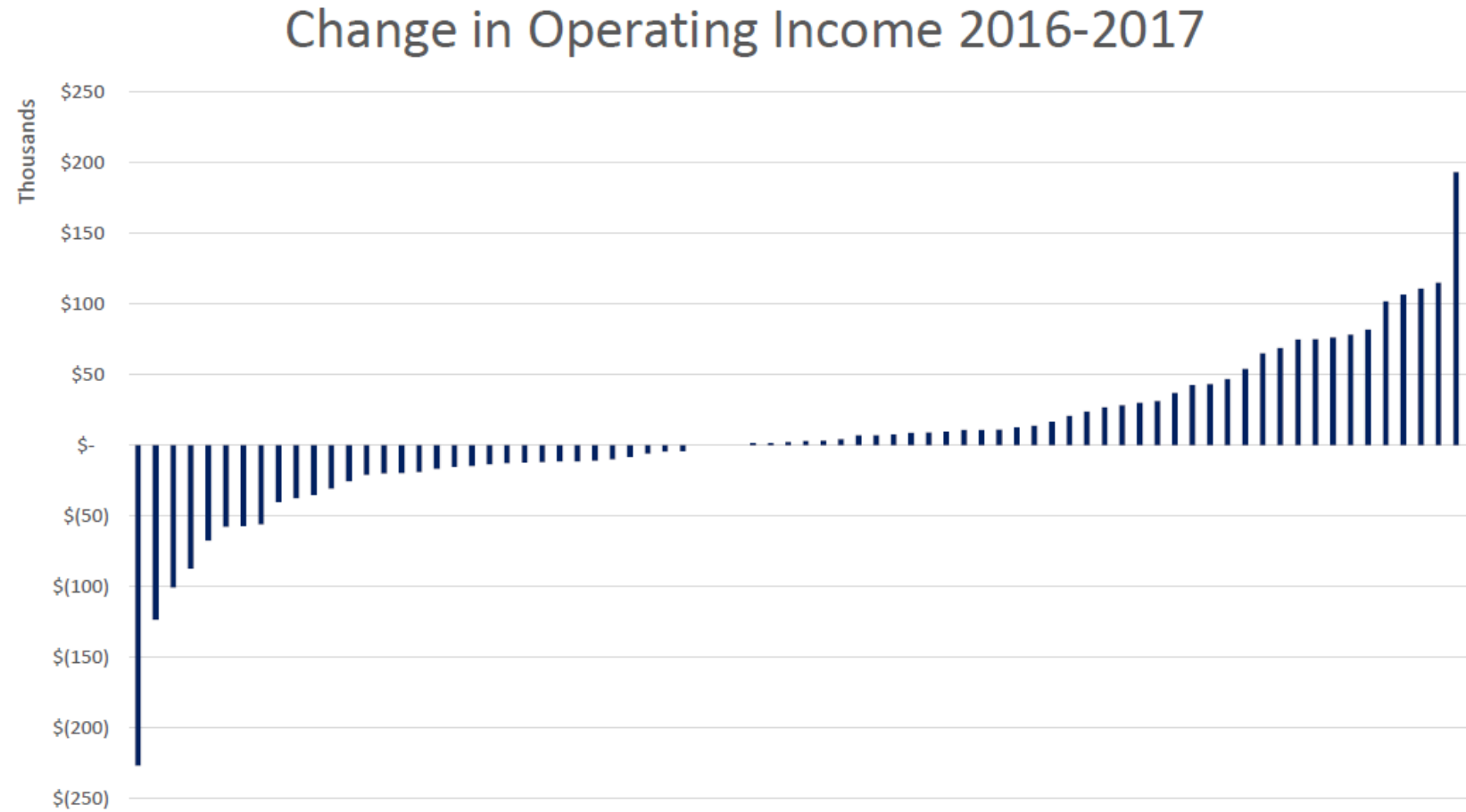
# Transparency and Accountability

## Parochial Reporting Submission Log

Dates Received

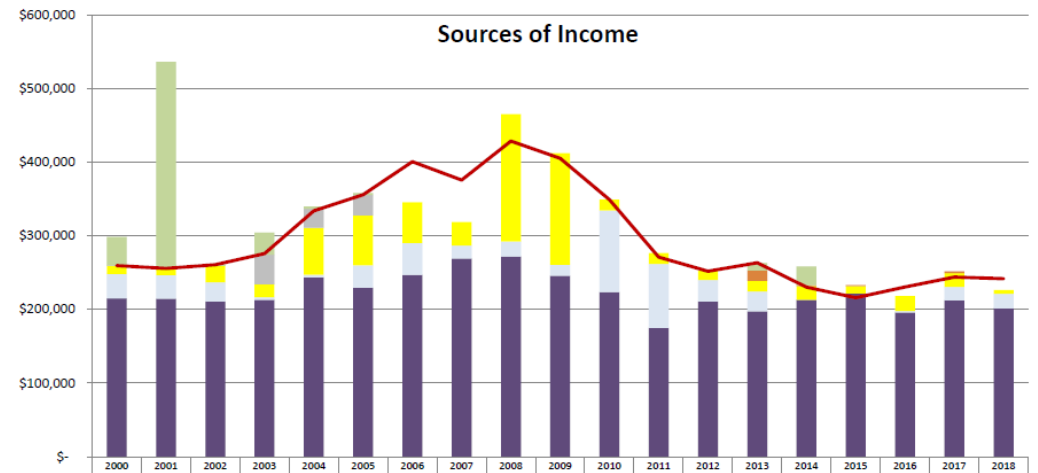
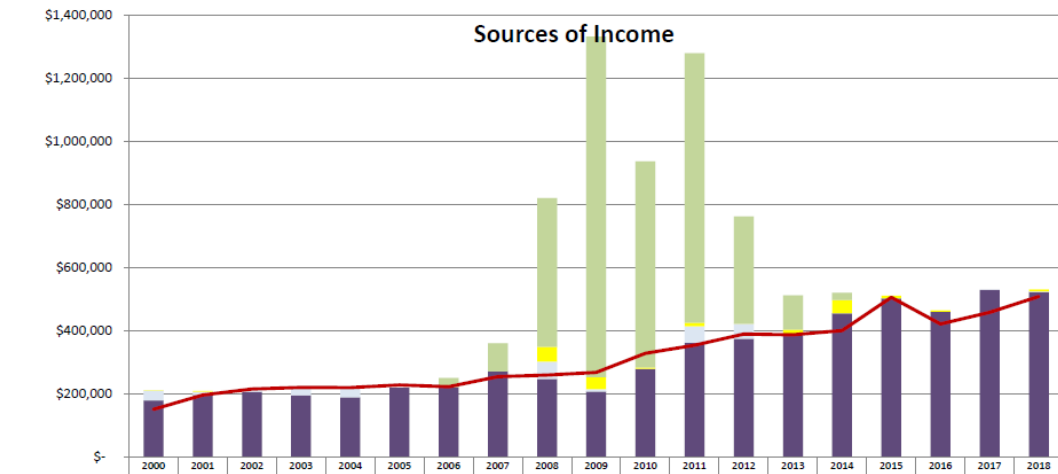
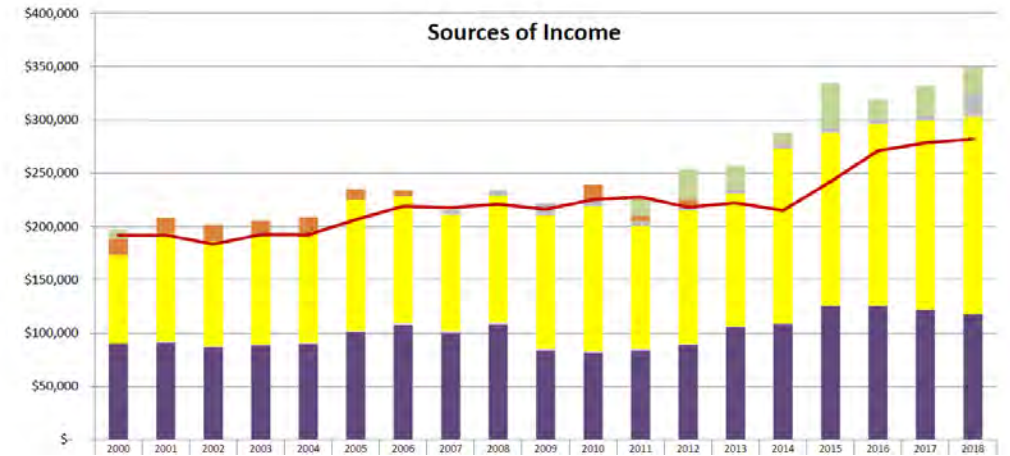
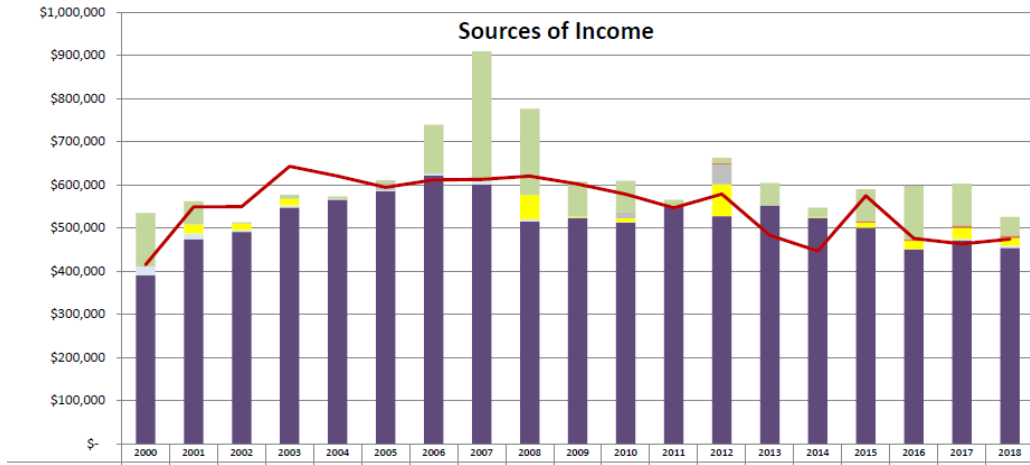
Color Code:		Info missing	Complete								Any changes to governing documents/policy?					
		Parochial Report	Annual Certificate	Balance Sheet	Income Statement	2019 Budge	Lay Delegation	Vestry Form	Clergy & Staff Form	Articles of Incorp.	Bylaws	Endowment	Safe-guarding	Memorial Garden/Columbarium?		
Congregation	City															
St Edmund the Martyr	Arcadia	25-Feb-19	25-Feb-19	25-Feb-19	ok?	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	N	N	N	Y	Yes		
St Andrews	Boca Grande	1-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	20-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	N	N	N	N	None		
St Marys	Bonita Springs	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	N	Yes		
Christ	Bradenton	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	N	N	N	Y	Yes		
St Georges	Bradenton	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	25-Feb-19	20-Feb-19	20-Feb-19	20-Feb-19	N	N	N	Y	Yes		
St John	Brooksville	1-Mar-19	1-Mar-19	26-Mar-19	1-Mar-19	26-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	N	N	N	N	None		
Epiphany	Cape Coral	18-Mar-19		18-Mar-19	18-Mar-19	18-Mar-19	28-Jan-19	28-Jan-19	18-Mar-19 Clergy only							
Holy Trinity	Clearwater	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	None		
St John	Clearwater	13-Mar-19	13-Mar-19	13-Mar-19	13-Mar-19	13-Mar-19	13-Mar-19	13-Mar-19	13-Mar-19	Y	Y	N	Y	None		
Ascension	Clearwater	26-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	N	N	Y	Y	Yes		
Good Samaritan	Clearwater	28-Feb-19	28-Mar-19	28-Feb-19	28-Feb-19	14-Mar-19	28-Mar-19	28-Mar-19	28-Mar-19	Y	Y	Y	Y	Yes		
St Marys	Dade City	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19		11-Mar-19	11-Mar-19	N	N	N	Y	Yes		
Good Shepherd	Dunedin	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	N	N	N	Y	None		
St Davids	Englewood	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	Yes		
Iona Hope	Fort Myers	19-Feb-19	19-Feb-19	19-Feb-19	19-Feb-19	19-Feb-19	19-Feb-19	19-Feb-19	19-Feb-19	N	N	N	Y	None		
Lamb Of God	Fort Myers	12-Apr-19	12-Apr-19	12-Apr-19	12-Apr-19	12-Apr-19	26-Feb-19	26-Feb-19	26-Feb-19	N	N	N	Y	None		
St Hilarys	Fort Myers	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	20-Mar-19	17-Apr-19	26-Feb-19	26-Feb-19	N	Y	N	N	None		
St Lukes	Fort Myers	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	N	N	N	Y	Yes		
St Raphaels	Ft Myers Bch	6-Mar-19	6-Mar-19	6-Mar-19	6-Mar-19	6-Mar-19	6-Mar-19	6-Mar-19	6-Mar-19	N	N	Y	Y	None		
Annunciation	Holmes Beach	20-Feb-19	14-Mar-19	14-Mar-19	14-Mar-19	14-Mar-19	14-Mar-19	14-Mar-19	14-Mar-19	N	N	N	Y	Yes		
St Martins	Hudson	3-Apr-19	3-Apr-19	3-Apr-19	3-Apr-19	3-Apr-19	3-Apr-19	3-Apr-19	3-Apr-19	N	N	N	N	None		
Calvary	Indian Rocks	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	N	N	N	Y	Yes		
Good Shepherd	LaBelle	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	19-Mar-19	27-Feb-19	27-Feb-19	27-Feb-19	N	N	N	Y	Yes		
St Mary Magdalene	Lakewood Ranch	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	Yes		
Resurrection	Largo	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	Yes		
St Anselm	Lehigh Acres	6-Mar-19	6-Mar-19 pg 1	6-Mar-19	6-Mar-19	6-Mar-19		6-Mar-19	6-Mar-19	N	N	N	Y	None		
All Angels	Longboat Key	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	Coming in April	4-Mar-19	4-Mar-19	4-Mar-19	N	N	N	Y	Yes		
St Mark	Marco Island	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	26-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	N	N	N	Y	Yes		
Trinity By The Cove	Naples	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	None		
St John	Naples	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	Yes		
St Monica	Naples	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	N	N	N	Y	Yes		
St Pauls	Naples	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19	11-Mar-19	N	N	N	Y	Yes		
St Stephens	New Port Richey	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	4-Mar-19	N	N	N	Y	Yes		
All Souls	North Ft Myers	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	28-Feb-19	N	N	N	Y	None		
St Nathaniel	North Port	9-Apr-19	9-Apr-19	9-Apr-19	9-Apr-19	9-Apr-19	9-Apr-19	9-Apr-19	9-Apr-19	N	N	N	Y	Yes		
Holy Spirit	Osprey	5-Apr-19	5-Apr-19	5-Apr-19	5-Apr-19	5-Apr-19	5-Apr-19	5-Apr-19	5-Apr-19	N	N	N	Y	None		
St Alfreds	Palm Harbor	8-Mar-19	26-Mar-19	8-Mar-19	8-Mar-19	20-Mar-19	26-Mar-19	26-Mar-19	26-Mar-19	N	N	N	Y	None		
St Marys	Palmetto	13-Feb-19	13-Feb-19	13-Feb-19	13-Feb-19	13-Feb-19	15-Mar-19	13-Feb-19	13-Feb-19	N	N	N	Y	Yes		
St Giles	Pinellas Park	5-Apr-19		4-Mar-19	4-Mar-19	4-Mar-19	18-Apr-19	4-Mar-19	4-Mar-19							
St Peters	Plant City	20-Mar-19	20-Mar-19	22-Mar-19	22-Mar-19	22-Mar-19	20-Mar-19	20-Mar-19	20-Mar-19	Y	Y	N	Y	Yes		
St James	Port Charlotte	1-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	1-Mar-19	N	N	N	Y	Yes		
Good Shepherd	Punta Gorda	22-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	26-Feb-19	22-Feb-19	26-Feb-19	26-Feb-19	N	N	N	Y	None		
Holy Spirit	Safety Harbor	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	27-Feb-19	N	N	N	Y	Yes		
St Michael	Sanibel	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	8-Mar-19	N	N	N	Y	Yes		
Nativity	Sarasota	18-Mar-19	18-Mar-19	18-Mar-19	18-Mar-19	2-Apr-19	18-Mar-19	18-Mar-19	18-Mar-19	N	N	N	Y	None		

# Transparency and Accountability

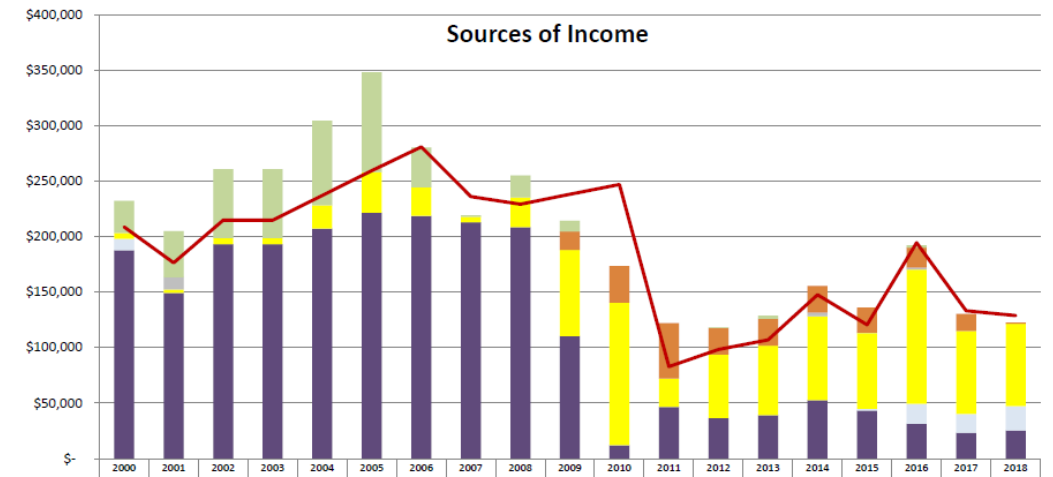
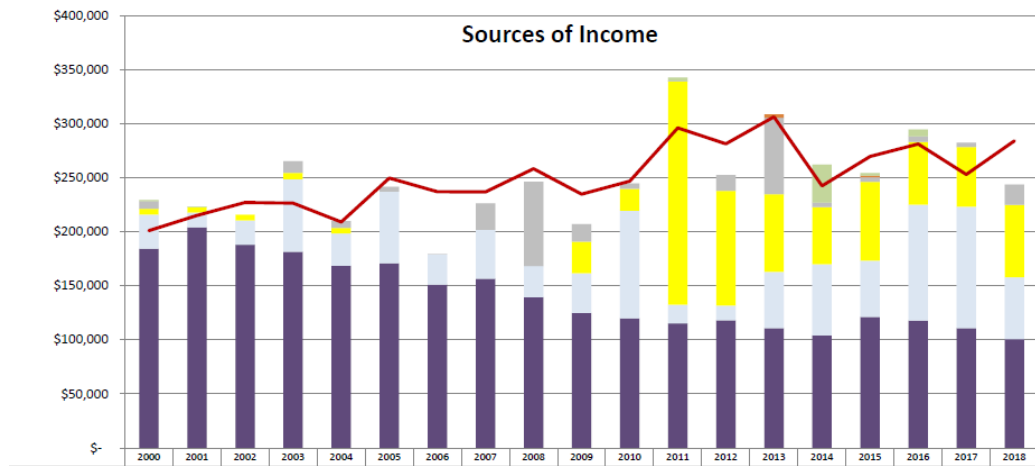
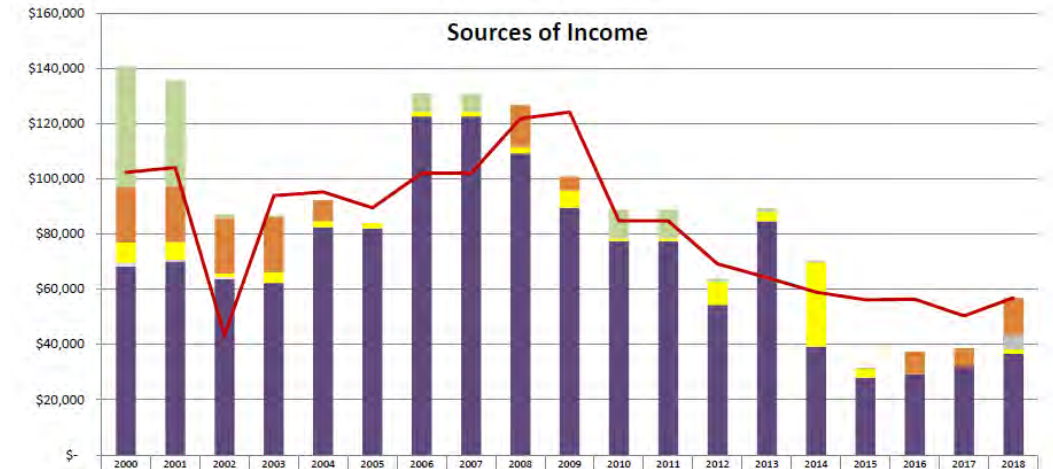
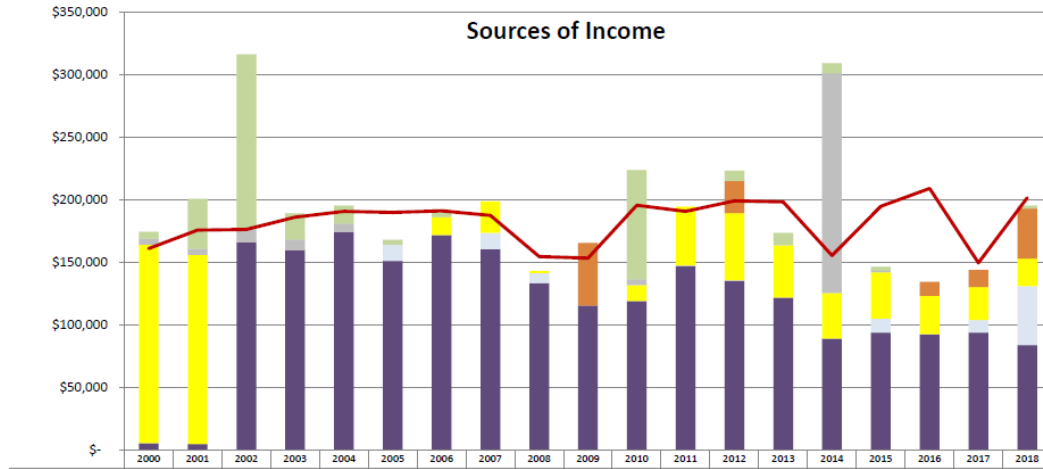




# Transparency and Accountability



# Transparency and Accountability



# Transparency and Accountability

## TEC Updates Parochial Report Metrics

The State of the Church Committee of the Episcopal Church General Convention implemented new metrics to measure mission, starting with the 2017 Parochial Report.

As this is the first year in which the data is collected, we anticipate the need for data validation efforts to ensure the information is consistently quantified and reported. For now, we are thrilled to have a first look at these measures of mission in our communities.

## Measuring Mission

Type	Nbr of Churches	Estimated Number of People Served Each Month in 2017			
		Total	Avg	Max	Max is:
Food pantry, soup kitchen, or meal projects	49	27,181	604	7,000	Lamb of God
Sustainable food garden/cooperative (such as "Farm to Tra	1	10	10	10	St. John, Clearwater
Cash, vouchers, or help with rent/utilities	31	494	16	125	St. Mary, Dade City
Day care, preschool, before- or after-school programs	9	769	96	600	St. Catherine, Temple Terrace
Tutoring or literacy programs	9	195	28	60	Annunciation, Holmes Beach
Health programs (parish nurse, clinics, health education, ei	17	1,110	79	360	St. Mark's, Venice
Community organizing, organized social issue advocacy	13	163	27	50	St. Mark's, Venice
Job placement, job training, employment counseling	1	75	75	75	All Angels, Longboat Key
Building projects (such as Habitat for Humanity)	10	225	28	100	St John Divine, Sun City Center
Support groups (bereavement, divorce, job loss, 12-step, e	30	3,517	135	1,000	St. John, Clearwater
Programs for the elderly and homebound persons	18	1,453	97	901	St. Andrew, Spring Hill
Clothes closet, thrift store	30	20,070	772	5,000	St. Vincent, St. Petersburg
Homeless or no-freeze shelter	7	1,621	232	700	St. John, Naples
Overseas sponsorships, microloans, Heifer Project, Haiti re	25	1,428	79	500	All Angels, Longboat Key
Other	26	6,394	304	1,300	
<b>Total Diocese of Southwest Florida</b>	<b>276</b>	<b>64,704</b>	<b>278</b>	<b>7,000</b>	



# Transparency and Accountability



## TEC RESOURCES

- For congregation
- For diocese

<https://pr.dfms.org/>

PAROCHIAL REPORT FILING SITE

THE *Episcopal* CHURCH

Canonical Deadlines ([CANON I.6.1-5](#)):

- The 2018 Parochial Report is due to your diocese by **March 1, 2019** [52 days ago]. *Make sure to check with your diocese for particular requirements.*
- All 2018 Parochial Reports must be reviewed and completed by the Dioceses to the General Convention Office by **May 1, 2019** [9 days].

« DIOCESE MENU

Parish Information

Preparation and Certification

Membership, Attendance, & Services

Stewardship & Financial

Clergy

Outreach Ministries & Volunteer Activity

Mark Complete

Print Report

Support

Log out

St Edmund the Martyr (Arcadia): Print Report

Year   Select a different year to see a previously-filed report from as long ago as 1998.

Blank PDF [Blank PDF](#)

Fillable PDF [Fillable PDF](#)

For 11-year data charts depicting your congregation's Participation and Giving Trends, as well as a demographic profile of your surrounding community, please see our [Studying Your Congregation and Community](#) tool.

The report is in Adobe Acrobat format (PDF). If you do not have Adobe Acrobat Reader software installed or if you have problems opening the document, [click here](#) to download it.

ENGLISH

|

Español

|

Français

# Transparency and Accountability



## TEC RESOURCES

- For congregation
- For diocese

<https://www.episcopalchurch.org/research-and-statistics>

### Research and Statistics

The Parochial Report is the oldest, continuous gathering of data by The Episcopal Church. By tradition and canon, the reporting requirements are developed by the House of Deputies' Committee on the State of the Church, using a form approved by the church's Executive Council. Seen as an annual rite of passage throughout The Episcopal Church, and overseen by the Executive Officer of General Convention, the Parochial Report touches every congregation of the church. Together with other data, including that of the Recorder of Ordinations and the Registrar of General Convention, the Parochial Report provides an insight to the state of the church.

Parochial Report  
Results

Forms and Instructions

Data Requests

### Study your Congregation and Community

In order to know who you are, you need to examine where you are and where you have been.

Looking at the social and demographic characteristics of the local community sheds light on the people to which we hope to minister. Looking at trends in membership, average worship attendance, and financial giving sheds light on congregational strength and whether current patterns indicate growth, decline or stability.

By following the instructions below, you can display and print two charts and a community demographic profile. The two charts track membership, participation, and giving over the most recently available eleven years for your congregation and your diocese. These data are from annual Parochial Reports. The community demographic profile will give you a demographic overview of the area within a three-mile radius of your congregation's physical location.

See your church and community profile [here](#). Profiles of a larger area are available from the General Convention office.

Select Chart or Community Demographic Profile

Format	Color
Diocese	(SELECT)
Church	(SELECT A DIOCESE FIRST)

[View Diocese Chart](#) [View Church Chart](#) [View Community Profile](#)

Need Help? [Read Instructions](#)

# Transparency and Accountability



## TEC RESOURCES

- For congregation
- For diocese

<https://www.generalconvention.org/research-and-statistics> (available in Spanish)



### EPISCOPAL DOMESTIC FAST FACTS TRENDS: 2013-2017

	2013	2014	2015	2016	2017
<b>Domestic Parishes and Missions</b>	<b>6,622</b>	<b>6,553</b>	<b>6,510</b>	<b>6,473</b>	<b>6,447</b>
Active Baptized Members	1,866,758	1,817,004	1,779,335	1,745,156	1,712,563
Net Change in Active Membership from Prior Year	-27,423	-49,754	-37,669	-34,179	-32,593
One Year % Change in Active Members	1.4%	-2.7%	-2.1%	-1.9%	-1.9%
Five Year % Change in Active Members	-9%	-9%	-9%	-9%	-10%
Ten Year % Change in Active Members	-18%	-19%	-19%	-19%	-19%
% of Churches Growing 10%+ in Members (past 5 years)	25%	24%	24%	24%	22%
% of Churches Declining 10%+ in Members (past 5 years)	40%	40%	40%	41%	41%
<b>Total Average Sunday Worship Attendance (ASA)</b>	<b>623,691</b>	<b>600,411</b>	<b>579,780</b>	<b>570,453</b>	<b>556,744</b>
Net Change in ASA from Prior Year	-16,451	-23,280	-20,631	-9,327	-13,709
One Year % Change in ASA	-2.6%	-3.7%	-3.4%	-1.6%	-2.4%
Five Year % Change in ASA	-12%	-12%	-12%	-13%	-13%
Ten Year % Change in ASA	-24%	-25%	-26%	-25%	-24%
% of Churches with any Increase in ASA (from prior year)	33%	34%	31%	36%	31%
% of Churches with any loss in ASA (from prior year)	53%	54%	57%	48%	52%
% of Churches Growing 10%+ in ASA (past 5 years)	19%	18%	18%	16%	15%
% of Churches Declining 10%+ in ASA (past 5 years)	52%	53%	55%	58%	57%
Percent of Congregations with 200 Members or Less	60%	60%	60%	61%	62%
Percent of Congregations with 500 Members or More	14%	14%	14%	14%	13%
Median Active Baptized Members	152	150	147	143	141
Percent of Congregations with ASA of 100 or less	69%	70%	71%	71%	72%
Percent of Congregations with ASA of 300 or more	4%	4%	4%	4%	4%
Median Average Sunday Worship Attendance	61	60	58	57	55
<b>Average Pledge</b>	<b>\$2,553</b>	<b>\$2,626</b>	<b>\$2,707</b>	<b>\$2,776</b>	<b>\$2,873</b>
Plate & Pledge % Change from Prior Year	+0.8%	-0.7%	+0.7%	-0.1%	+1.7%
Normal Operating Income % Change from Prior Year	+1.2%	-0.3%	+1.2%	+0.4%	+1.9%
Inflation Rate in Calendar Year	+1.5%	+0.8%	+0.7%	+2.1%	+2.1%



# Transparency and Accountability

Questions and Comments



# Frameworks for Understanding



Email address

churchaccounting@stswithins.com

Password

.....

**VESTRY MEETS THE  
3<sup>RD</sup> THURSDAY OF THE MONTH  
AT 6PM IN THE LIBRARY**

## HONEY DO LIST

Priority	Due Date	What	Who	In Progress	Done
		Fix the Roof Leak			
		Install New Ceiling Fans			
		Repair dripping faucets			
		Organize Parish Work Day for yard cleanup			
		Organize closets for Youth Group use			
		Meet Fire inspector			
		Craft a plan for opening a thrift shop			
		Find opportunities for additional revenue by renting the parish hall			
		Define an evangelism plan			

# Frameworks for Understanding





# Frameworks for Understanding

The Episcopal Diocese of Southwest Florida 2018 Diocesan Vestry Retreat

## Benchmark Report

The news related to the benchmarks and statistics for the churches of Southwest Florida

### Endowments

#### Endowment Asset Growth

Year	True Endowment (Millions)	Board Designated (Millions)
2012	\$21	\$12
2013	\$23	\$17
2014	\$24	\$20
2015	\$25	\$23
2016	\$29	\$24
2017	\$33	\$24

Invested assets have grown 71% over the last five years - not only due to positive returns in the market, but also \$20.8M of contributions. Since 2014, 23 churches have started endowments in the DEMP. Their combined value is now over \$3.1M.

### Endowment Policy

An important governing document which outlines the process and people involved in receiving legacy gifts, monitoring investment performance, and managing distributions.

### What's DEMP?

23 of our churches participate in the Diocesan Endowment Management Program (DEMP). "Piggy back" along with the diocesan endowment management function to learn, save on fees and gain confidence in your endowment.

### Laws Related to Fiduciary Responsibility

Florida Statute 617.2104 Florida Uniform Prudent Management of Institutional Funds Act (FUPMIFA) adopted in 2012

### Investment Management Firms Serving Us

Firm	# churches	\$ Million
ECF/State Street (DEMP)	23	\$3.1
ECF/State Street (direct)	13	\$4.7
Northern Trust	8	\$14.6
RBC Wealth Management	2	\$1.8
SFI	1	\$6.9
SunTrust	1	\$2.5
Provisie	1	\$1.9
Wells Fargo	2	\$3.9
Local Broker	12	\$8.4
Local Bank	5	\$1.1

### WANTED

#### Remaining Churches to Start Endowments:

- Good Shepherd-Labelle
- Holy Spirit-Safety Harbor
- Iona Hope
- Nativity
- St. Anselm
- St. Bede
- St. Francis
- St. Mary Magdalene
- St. Matthew
- St. Vincent

The Episcopal Diocese of Southwest Florida 2018 Diocesan Vestry Retreat

## Debt

### Debt Reduction

Year	Debt (Millions)
2010	\$19
2011	\$18
2012	\$19
2013	\$15
2014	\$13
2015	\$12
2016	\$9
2017	\$7

This decade has seen a steady reduction of debt. Our churches have worked to reduce their debt burden with capital campaigns and ongoing mortgage payments from their operating budgets. Five new loans in 2017 ranged in size from \$40,000 to \$200,000 - each was carefully considered in the context of sustainability.

### Canon Law for Debt

**TEC Canon 1.7.4:**  
All real and personal property held by any congregation is held in trust for this Church and the Diocese thereof.

**Diocesan Canon XIX.2.b:**  
No real property shall be encumbered, sold, alienated, transferred or conveyed without the prior consent and approval of the Bishop and Diocesan Council.

### Biggest Reducers of Debt in the last year

Iona Hope:	\$422k
Epiphany:	\$138k
Holy Trinity:	\$115k
CS Dunedin:	\$93k
St. Mary, Bonita:	\$88k
St. Andrew, Spring Hill:	\$79k
Good Shepherd, Venice:	\$74k
St. Hilary:	\$62k
Resurrection:	\$60k
St. Wilfred:	\$51k

### Total Reduction of Debt

**\$1,340,000 in 2017**

### Diocesan Revolving Loan Fund (RLF) Facts

- 20 loans totaling \$3,463,397
- Available Funds \$2,300,000
- \$75,000 of annual interest income grows the fund for the future

Contact Diocesan House for details about the Revolving Loan Fund.

### Other Lenders

Bank of Tampa, BB&T, Capital Bank, Charlotte State Bank, Iberia Bank, Jefferson Bank, Regions Bank, Synovus Bank, Thrivent Bank, USAmeriBank, Whitney Bank

### The "1/3 Principal" for Debt

The "1/3 Principal" is a primary factor used by the diocesan Finance Committee in the approval of loan proposals. According to this principal, the amount of debt incurred should not exceed 1/3 of the total cost of the project. At least 1/3 of the project's total cost should be held by the congregation/institution as cash in the bank before the project begins. Another 1/3 of the project's total cost may be pledged amounts.

### St. Andrew, Spring Hill Mortgage Burning

# Frameworks for Understanding

The Episcopal Diocese of Southwest Florida

## Property Usage

By Type, (# churches, annual income to church budget)

	Preschool/After Care (13, \$0-57k)
	K-8/12 School (9, \$0-151k)
	Thrift Shop (13, \$0-148k)
	Rental Houses/Rectory (26, \$0 - 22k)
	Parking Lot (4, \$1-43k)
	Cell Tower (2, \$19-24k)
	Group Meetings (41, \$0-22k)
	Community Garden/ Farmers Market (2, \$2-47k)
	Hosting Other Worshipping Community (3, \$10-48k)

These are the many ways in which congregations can utilize their church buildings for ministry and to enhance operating income and outreach funds. Call Diocesan House for best practices examples.

## Schools "Under the Authority" of TEC

**Preschools (7):** Ascension, Lamb of God, St. Alban, St. Boniface, St. Mark-Venice, St. Wilfred, St. Mark-Marco Island  
**Schools (7):** Good Shepherd Day School, St. Stephen's, St. John-Tampa, St. Mary-Tampa, Berkeley, St. Paul's School, Canterbury

2018 Diocesan Vestry Retreat

## Canon Law for Property

*TEC Canon 1.7.4:*

All real and personal property held by any congregation is held in trust for this Church and the Diocese thereof.

*Diocesan Canon XIX.2.b:*

No real property shall be encumbered, sold, alienated, transferred or conveyed without the prior consent and approval of the Bishop and Diocesan Council.

## Lease Approval

Every lease must have the prior written consent and approval of Diocesan Council. Refer to the *Diocesan Lease Guidelines* for more details and best practices related to lease.

## Rectories

15 of our congregations utilize rectories to house their clergy; 2 church-owned homes are used for sexton housing.



Good Shepherd, Dunedin  
Furniture Thrift Shop at Sunshine Plaza

The Episcopal Diocese of Southwest Florida

## Capital Budgets and Campaigns



Capital projects and campaigns have increased dramatically in the last two years, matching the level last spent in 2004. Projects range from \$50,000 to \$10M. Many are phased master plans and others are specific projects such as solar power installations. Most congregations are meeting capital needs in some way, as 59 of 76 congregations (77%) raised capital funds in 2016-2017.

## ECF Consultants

Our partners at the Episcopal Church Foundation facilitate the capital campaign process with their Discern-Study-Ask methodology. Learn more at [www.episcopalchurch.org](http://www.episcopalchurch.org)



## Hurricane Irma in 2017

Hurricane Irma travelled straight through our diocesan boundaries cancelling Sunday services at every congregation. Yet, miraculously, only 25 insurance claims were filed as a result of Irma damage. Of these, 10 received a payout from their Church Insurance Agency policy, totaling \$375,000. In December 2017, Diocesan Council voted to distribute \$200,000 to all 76 congregations for aid in meeting hurricane deductibles and cleaning up/repairing our church buildings. The experience has highlighted the importance of having capital reserves to meet hurricane deductibles and extraordinary repairs.

2018 Diocesan Vestry Retreat

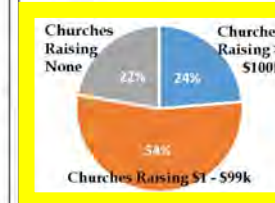
## Canon Law for Capital Projects

*Capital Apportionment:*

Since adopted by a resolution of the 1999 Diocesan Convention, Capital Apportionment is calculated as 10% of the congregation's "Funds Received for Capital Projects", reported on Line 8 of the Parochial Report. These apportionment dollars are directed to the capital needs of the diocese and the support of new missions.

## Recent Capital Income Raised (2016-2017)

Redeemer, Sarasota	\$2.5M
St. Michael & All	
Angels, Sanibel	\$628k
St. John, Tampa	\$608k
Iona Hope, Fort Myers	\$537k
St. Peter, Plant City	\$528k



St. Peter, Plant City Capital Project Team



# Frameworks for Understanding



## ECF RESOURCES

- For congregation
- For diocese

<https://www.episcopalfoundation.org/programs/planned-giving/pg-on-demand-info>

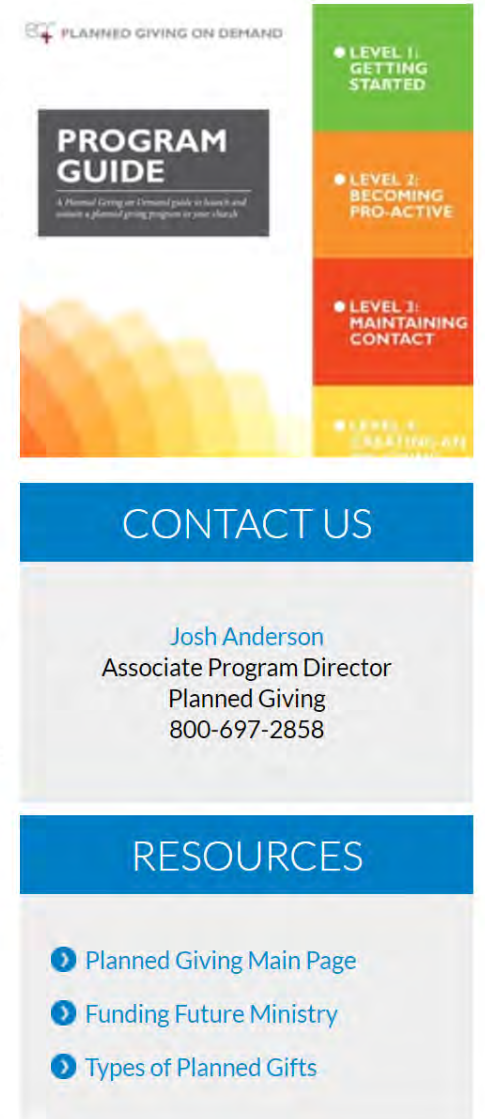
### PLANNED GIVING ON DEMAND INFORMATION

Planned Giving on Demand provides easy-to-use resources to help you launch and sustain a planned giving program in your church, all in one place. A combination of printed and online resources, Planned Giving on Demand will walk with you through every step of the way to establish, enhance, and sustain an effective planned giving ministry.

Planned Giving on Demand includes:

- *Planned Giving on Demand Program Guide* (provided in both printed and online formats): A step by step guide to implementing planned giving in your congregation, including 5 phases of launching, and sustaining, a successful planned giving program (includes sample timelines). In the online version, resources are hyper-linked throughout the document for easy-access.
- *Funding Future Ministry* (available as printed edition or e-book): ECF's comprehensive planned giving manual that ensures that clergy and lay leaders know the most effective ways to encourage legacy gifts, all set in a theological framework.
- *Planned Giving Brochure & Booklet samples*: Samples of *Planned Giving: Stewards of God's Bounty* (ECF's basic planned giving brochure) and *Planning for the End of Life* (ECF's booklet for reviewing important end of life matters). Digital versions of ECF's entire Planned Giving Brochure & Booklet series are available.
- Online Resources: Access to a host of online resources including webinars, articles, and a national network of PG Shepherds.

Planned Giving on Demand can be ordered through [Forward Movement](#) or by calling 800-543-1813.



The graphic displays the 'Planned Giving on Demand' resources. It includes a 'PROGRAM GUIDE' booklet, a vertical stack of four colored boxes representing the five levels of the program: Level 1 (green, 'GETTING STARTED'), Level 2 (orange, 'BECOMING PRO-ACTIVE'), Level 3 (red, 'MAINTAINING CONTACT'), and Level 4 (yellow, 'CREATING AN ENDURING MINISTRY'). Below this is a 'CONTACT US' section with the name 'Josh Anderson', title 'Associate Program Director', and phone number '800-697-2858'. At the bottom is a 'RESOURCES' section with three links: 'Planned Giving Main Page', 'Funding Future Ministry', and 'Types of Planned Gifts'.

ECF+ PLANNED GIVING ON DEMAND

**PROGRAM GUIDE**  
A Planned Giving on Demand guide to launch and sustain a planned giving program in your church

- LEVEL 1: GETTING STARTED
- LEVEL 2: BECOMING PRO-ACTIVE
- LEVEL 3: MAINTAINING CONTACT
- LEVEL 4: CREATING AN ENDURING MINISTRY

**CONTACT US**

[Josh Anderson](#)  
Associate Program Director  
Planned Giving  
800-697-2858

**RESOURCES**

- ➔ [Planned Giving Main Page](#)
- ➔ [Funding Future Ministry](#)
- ➔ [Types of Planned Gifts](#)



# Frameworks for Understanding

Questions and Comments

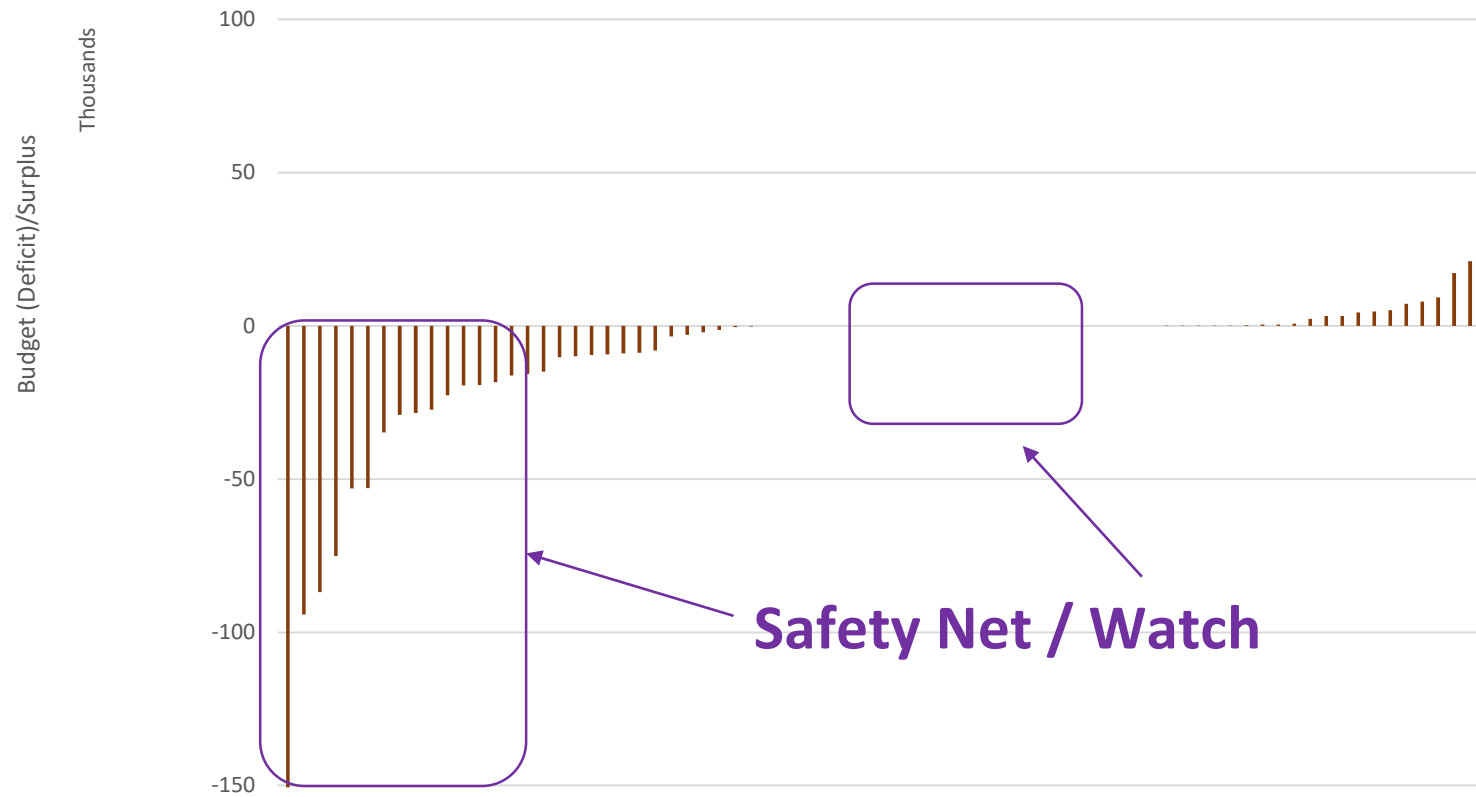


# Data-driven Decisions



# Data-driven Decisions

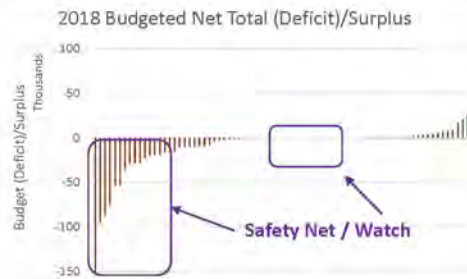
## 2018 Budgeted Net Total (Deficit)/Surplus



# Data-driven Decisions

The Episcopal Diocese of Southwest Florida

## Operating Budgets



In reviewing the annual budgets, the diocesan staff look for deficits as well as situations where a budget deficit is funded with reserves. A sustainable budget is based on operating income that can continue for the long term – from plate & pledge, appropriate distributions from endowments/designated funds, income from building use or fundraisers. Plugging a deficit with reserves is an indicator of distress. When the reserves/cash are gone, options are limited and consequences are extreme. This is a situation where the diocesan staff takes care to intervene, so that the leaders can have time and necessary expertise to plan and act well in advance of a crisis.



Holy Trinity, Clearwater 2018 Annual Meeting

## Mind The Gap

When the diocesan staff reviews the submitted budgets, we separate out any so-called plugs to reveal the true budget status. 'Faith budget', 'additional gifts', loans from reserves, and non-specific fundraising are just a few examples that should not be included in an approved budget. A seemingly balanced budget using such plugs can be misleading to the general congregation.

2018 Diocesan Vestry Retreat

## Canon Law for Budgets

*Diocesan Canon VII.5.b:*

It shall be the duty of the congregational council to ...prepare a budget providing for the necessary requirements and expenditures of the Congregation.

*Diocesan Canon VII.1:*

Annual Meeting. A Congregation shall hold an annual meeting every year...shall be within 120 days before or on the 28<sup>th</sup> of February.

## Church Budget Expense Category Check

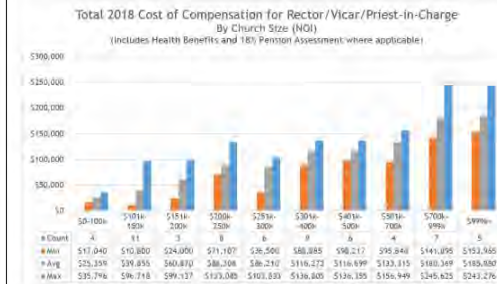
	% of total expenses		
	Min	Avg	Max
Staff	27%	56%	75%
Building & Grounds	12%	21%	47%
Debt Service	0%	2%	16%
Budgeted Outreach	0%	2%	11%
Other	14%	22%	35%

## Deacons Serving SWFL

A total of 44 deacons serve our congregations: 25 churches have one deacon; 9 churches have more than one; 43 have none. The diaconate is manifested in multiple ways in the life of the diocese.

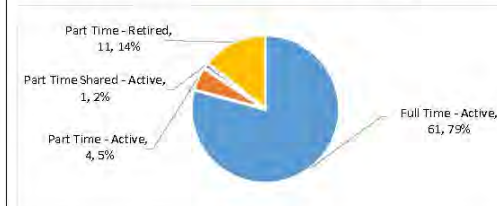
The Episcopal Diocese of Southwest Florida

## Staff and Compensation



Compensation involves more than a salary figure, as legal and canonical requirements make every compensation package unique. Diocesan staff are involved in clergy transitions from the initial search committee discussions about budget to the final details of the letter of agreements signed. Each congregation is an individual employer facing a constantly changing human resources environment. Compliance to government and canonical laws is one of the most important oversight roles of the Office of the Bishop. Compensation benchmarks and illustrations of alternative models for clergy and lay staffing are ready and available for vestries at the time of transition.

## Full time vs. Part time Priest-In-Charge



## Working While Pensioned

11 of our 76 churches (14%) and 5 interim positions are served by a retired clergy receiving pension benefits from the Church Pension Fund. The maximum amount a retired cleric can earn is \$38,250.

2018 Diocesan Vestry Retreat

## Canon Law for Church Staff: Clergy and Lay Pension and Health Plan

*TEC Canon I.8.Sec. 1-3:*

The Church Pension Fund is authorized to establish and administer the clergy pension system... and also the lay employee pension system and denominational health plan of the Church

*Gen Convention Resolution A177:* All clergy and lay employees who work minimum of 1500 hours annually (30 hr/wk) are required to participate in the Episcopal Church Denominational Health Plan (DHIP).

*Gen Convention Resolution A138:* All lay employees who work 1000 hours annually (20 hr/wk) shall be provided a pension benefit.

## US Laws Affecting Church Staff

- ❖ IRS
- ❖ Medicare
- ❖ Affordable Care Act
- ❖ Department of Labor



Veteran Interim Rectors  
Ed Henley and Dee de Montmollin



# Data-driven Decisions



## CPG RESOURCES

- For congregation
- For diocese

<https://cpg.org/>

CHURCH PENSION GROUP

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**The Way of Love**  
Introducing seven Little Books of Guidance, one for each of the core practices that define [The Way of Love](#)—Turn, Learn, Pray, Worship, Bless, Go, and Rest.

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**Forms & Publications**  
[Formularios en Español](#)

**Tools & Resources**



### Administrators' Resource Center

Be sure to check the [Administrators' Resource Center](#) for the latest news and updates.

- **Site Maintenance** will be conducted 9:00PM ET Friday, May 10 — 1:00PM ET Saturday, May 11. Some web applications will be unavailable during that time. See [News & Updates](#) for more.
- **Annual Statements** are being mailed to clergy and lay employees this month. Clergy and lay employees should review this information (such as their current employment, compensation, and earned credited service) for accuracy. If you need to make any corrections, please log onto the Employee Roster.
- **Save the date!**  
2019 BPC will be May 6-10 at Camp Allen  
2019 EBAC will be Sept 30-Oct 3 in New York City



### Perspective

Read the spring 2019 edition of [Perspective](#), an update from Mary Kate Wold, CEO and President. In this edition:

- [Are You Ready? Lay Employees and Retirement](#)
- [Untangling Healthcare](#)
- [Our Clergy Pension Plans - for Deacons Too](#)
- [You Spoke, We Listened: CPG Around the Church](#)
- [Author's Corner: Bishop Mark D. W. Edington](#)

# Data-driven Decisions

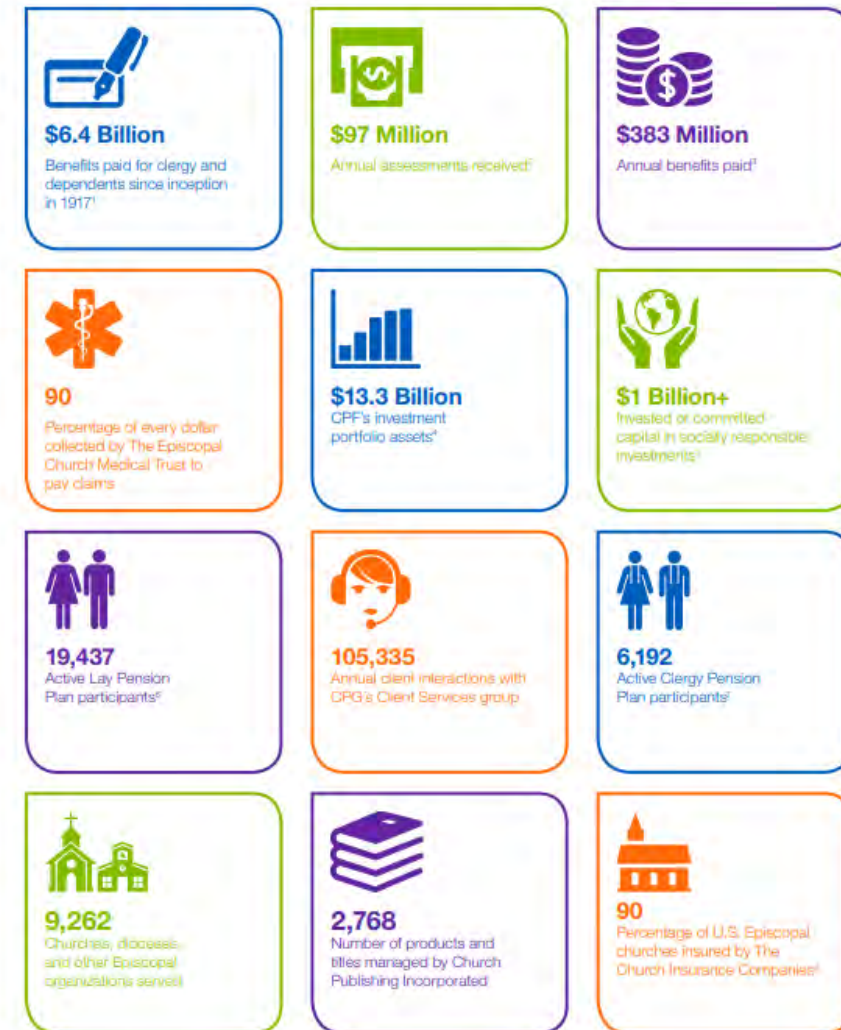


## CPG RESOURCES

- For congregation
- For diocese

<https://cpg.org/>

### The Church Pension Fund—At-A-Glance



<sup>1</sup>Since inception (1917) through 03/31/18. <sup>2</sup>Includes clergy, lay employees and CPG staff. 04/01/17–03/31/18. <sup>3</sup>Includes pension and other benefits (medical supplement) and life insurance paid for clergy and dependents, lay employees, and CPG staff. 04/01/17–03/31/18. <sup>4</sup>As of 03/31/18. <sup>5</sup>Includes participants in The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) and The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay DC Plan). <sup>6</sup>As defined under The Church Pension Fund Clergy Pension Plan and reported in the Actuarial Valuation Report dated 12/31/2017. <sup>7</sup>Includes property and liability protection. <sup>8</sup>As of 03/31/18. <sup>9</sup>As of 03/31/18.

From 2018 CPG Annual Report

# Data-driven Decisions

## Comparative Statistics

### 2015 Parochial Report Data

Group	Parishes	% with Cleric in Comp Report	Average Operating Revenue	% with Endowment \$500k or more	% with Operating Deficit	ASA	Average Seat Capacity
Diocese	77	77%	\$410,256	27%	54%	163	292
Province	1,262	61%	\$329,334	19%	43%	117	225
TEC	6,505	57%	\$264,488	24%	43%	88	216

From *Diocesan Report: Southwest Florida*, CPG Research Department, April 16, 2018

# Data-driven Decisions

## Open Parishes with No Employed Clergy\*



\*Employment is operationally defined as receiving assessable compensation

From EBAC Presentation: *Defining the Changing Church*, CPG Research Department, 2015



# Data-driven Decisions

Questions and Comments



Circ



# Circle of Communication




**DIOCESE of SOUTHWEST FLORIDA**  
*Honor our Tradition ~ Build for the Future ~ Mercy in Mission*

HOME ABOUT US CONGREGATIONS LEADERSHIP YOUTH, YOUNG ADULT MISSION, MINISTRY GOVERNANCE

Canon Michael Durning  
Canon to the Ordinary

2018 Diocesan Vocation  
The Diocese of Southwest Florida

**BISHOP SMITH'S WELCOME**



**DIOCGC**  
The Episcopal Church of the Central Gulf Coast

HOME ABOUT US MINISTRIES

**BISHOP RUSSELL'S CALENDAR**

**St Biggies Episcopal Church**  
Big City, FL  
222 N. Main St.  
Big City, FL 32401  
850-722-4001

Convocation: VI Parish/Mission: P

2019 Pledge to Dio. **\$28,000 (5.5%)**  
YTD Pledge Current:

3 Yr. Pledge Trend to Diocese:

Year	Pledged	%
2018	\$28,000	5.5%
2017	\$27,500	5.8%
2016	\$26,200	

Membership Reported

Year	Count	% Chng.
2018	385	3%
2017	355	7%
2016	331	1%

Congregational Statistics

Year	Best.	Comm.	Baptism/Wedding
2018	4	2	3
2017	3	3	2
2016	1	1	1

ASA Category


155

Operating Income: \$335,230  
Operating Expenses: \$314,520  
Operational Net: \$20,710

Year: 2018  
Parish: H  
Audit: Due 9/2019

2017: Y Y  
2016: Y Y

COMMENTS: For your visitation June 7. Parochial Report past due. Pension payments overdue 90 days; reminder that bill are due monthly net quarterly. Note: Rev. Smith is planning on statistical beginning August; planning template not completed / shared with vestry. Reminder that campus ministry grant expires end of year.




**EPISCOPAL CHURCH IN CONNECTICUT**  
PARTICIPATING IN GOD'S MISSION

Resources

**Joining Jesus in a New Missional Age**  
The Episcopal Church in Connecticut has started a collaborative initiative to support parishes and Regions in spiritual formation and raising financial resources

Read more in this media release from Jan 15, 2019

**IN A NEW MISSIONAL AGE**



**LISTENING**

We listen to God by dwelling in God's Word, and in stories of God in our lives and in our neighborhoods.



**Episcopal Diocese of Washington**  
*Engaging a changing world with an enduring faith in Jesus Christ*

About Congregational Vitality Ministries & Networks News & Events Resources & Forms Strategic Plan

Home > Strategic Plan > Regional Discovery Sessions

**Regional Discovery Sessions**

Becoming Good Soil

**Becoming Good Soil**

REGIONAL DISCOVERY SESSIONS DATES & RSVP

MORE INFORMATION & RESOURCES



# Circle of Communication



## PB RESOURCES

<https://www.episcopalchurch.org/>



## The Jesus Movement

We're following Jesus into loving, liberating and life-giving relationship with God, with each other and with the earth.

## The Five Marks of Mission

- To proclaim the Good News of the Kingdom
- To teach, baptize and nurture new believers
- To respond to human need by loving service
- To seek to transform unjust structures of society
- To strive to safeguard the integrity of creation and sustain and renew the life of the earth

Getting Started on the  
Way of Love

Start Here





# Anticipated Impact

## Outreach Ministries and Volunteer Activity of this Congregation

Using the check boxes below, did your congregation provide any of the following community service or outreach ministries during 2018?

If yes, were few volunteers involved in the ministry, or were a larger number of your members involved?

Please also estimate in the space provided approximately how many people were helped or served each month by ministry:

	No	Yes		
		Few volunteers involved	Many volunteers involved	Estimated number of people served
1. Food pantry, soup kitchen or meal projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Sustainable food garden/cooperative (such as "Farm to Tray")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Cash, vouchers or help with rent/utilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Day care, pre-school, before or after-school programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Tutoring or literacy programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Health programs (parish nurse, clinics, health education, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Community organizing, organized social issue advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8. Job placement, job training, employment counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9. Building projects (such as Habitat for Humanity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10. Support groups (bereavement, divorce, job loss, 12-step, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11. Programs for the elderly and homebound persons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12. Clothes closet, thrift store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13. Homeless or no-freeze shelter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14. Overseas sponsorships, microloans, Heifer Project, Haiti relief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15. Other, not listed:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Measuring Mission

	Estimated Number of People Served Each Month in 2017				
Type	Nbr of Churches	Total	Avg	Max	Max is:
Food pantry, soup kitchen, or meal projects	49	27,181	604	7,000	Lamb of God
Sustainable food garden/cooperative (such as "Farm to Tra	1	10	10	10	St. John, Clearwater
Cash, vouchers, or help with rent/utilities	31	494	16	125	St. Mary, Dade City
Day care, preschool, before- or after-school programs	9	769	96	600	St. Catherine, Temple Terrace
Tutoring or literacy programs	9	195	28	60	Annunciation, Holmes Beach
Health programs (parish nurse, clinics, health education, e	17	1,110	79	360	St. Mark's, Venice
Community organizing, organized social issue advocacy	13	163	27	50	St. Mark's, Venice
Job placement, job training, employment counseling	1	75	75	75	All Angels, Longboat Key
Building projects (such as Habitat for Humanity)	10	225	28	100	St John Divine, Sun City Center
Support groups (bereavement, divorce, job loss, 12-step, e	30	3,517	135	1,000	St. John, Clearwater
Programs for the elderly and homebound persons	18	1,453	97	901	St. Andrew, Spring Hill
Clothes closet, thrift store	30	20,070	772	5,000	St. Vincent, St. Petersburg
Homeless or no-freeze shelter	7	1,621	232	700	St. John, Naples
Overseas sponsorships, microloans, Heifer Project, Haiti re	25	1,428	79	500	All Angels, Longboat Key
Other	26	6,394	304	1,300	
Total Diocese of Southwest Florida	276	64,704	278	7,000	

# Anticipated Impact

The Episcopal Diocese of Southwest Florida

2018 Diocesan Vestry Retreat



## Outreach Inspirations and Examples

A sample of congregation-based outreach ministries in Southwest Florida

2018

## Engaging in Mission

### JUST ONE YEAR

For 2017, the Episcopal Diocese of Southwest Florida applied for Episcopal Charities Grants. The best, most innovative and creative projects were selected, and announced at the Diocesan Convention. In the six years of Episcopal Charities grants, these and many other projects have been successful in growing charitable efforts within the diocese.

So far, six Episcopal Charities grants were not only that worthy causes could receive the support they needed to carry out their mission, but also that celebrating these efforts across the diocese leads to additional parishes deciding to begin or expand their own programs, and to the needs of their particular community.

For 2017, the following are some of the grants:

- ALL SAINTS, TADPOH SPRINGS**  
Pick a town in your diocese and, using school resources to be a (historically hungry children), (from: Archbishop in Power Center).
- PRODIGY, HILLSBORO**  
A structured, faith-based life enrichment program designed to provide spiritual, social/emotional, and intellectual support for marginalized youth experiencing homelessness and isolation. The goal is to help young adults achieve a sense of purpose in their life journey with dignity and grace.
- GOOD SAMARITAN, CLEARWATER**  
This project involves conversion of a classroom into a space for discipleship, learning activities and resources for children aged 5-6 and their parents/caregivers. The goal is to engage children and adults in positive literacy opportunities and allow them to learn together through reading. They may even take books home.
- ST ALBAN, ST. PETERS BURG**  
In an effort to prepare the parish visitors in St. Alban's the School for the Visitation in the local technology support, elementary school. St. Alban's added a computer to its own program so that the children can view elementary school with increased confidence and reduced stress.
- ST. JAMES, TADPOH SPRINGS**  
The parish supports transitional housing for individuals and families in need.
- ST. CATERINA, TEMPLE TERRACE**  
St. Caterina is partnering with Temple Terrace Elementary School, where 87 percent of the students receive a free lunch. In partnership, school supplies and weekend food through a backpack program.
- ST. JAMES HOUSE OF ORANGE, TAMPA**  
Communities Kids Inc. has provided an after-school program for at-risk, inner-city children in the Tampa Heights neighborhood for more than 35 years. This includes serving a hot meal to 35 children during each week of the school year. 40% of the food is provided by Episcopal Diocese of Southwest Florida. The program will help the program improve its nutrition program and acquire the remaining 60%.
- CATHEDRAL CHURCH OF ST. PETER**  
Solid Medicine, in partnership with local health-care professionals, medical professionals, and educators, brings together health screenings, health education, and healthy food to St. Petersburg and Pinellas County. Participants are educated about nutrition and healthy eating and given opportunities to select produce, with the goal of reducing chronic disease and diet-related deaths.
- ST. MICHAEL, SARASOTA**  
For the past five years, St. Michael's has partnered with St. Michael's Church to provide food and pantry. The partner church, St. Michael's, can no longer sustain the program and will secure the relocation of the program, so that it can continue to provide food and pantry to the community.
- ST. JAMES, TAMPA**  
The parish is dedicated to providing healthy food options to approximately 100 families and 100 individuals who benefit from the program each month. The annual \$20,000 was used to purchase commercial grade refrigerated food, fresh produce and dairy foods that will increase the nutritious options available to the clients.
- ST. JAMES, TAMPA**  
Tampa receives an existing program. Provides assistance with transportation, food, medical expenses, and home repairs to individuals and families in the community.
- ST. JAMES, TAMPA**  
The parish is dedicated to providing healthy food options to approximately 100 families and 100 individuals who benefit from the program each month. The annual \$20,000 was used to purchase commercial grade refrigerated food, fresh produce and dairy foods that will increase the nutritious options available to the clients.

HOW FAR WILL YOUR DONATION REACH?

## Episcopal Charities in Southwest Florida

Congregation-based ministries are at the heart of our diocesan Episcopal Charities Endowment, which has granted \$186,000 over the last 6 years. Apply for a grant to kick start your outreach project - applications are at [www.episcopalswfl.org](http://www.episcopalswfl.org) - keyword 'Episcopal Charities'.

## SWFL Irma Relief Fund

Hurricane Irma swept through Southwest Florida in September 2017. As our congregations have worked to repair our churches and homes, many also have contributed resources to aid our neighbors. \$25,000 of funding remains available for humanitarian aid to individuals impacted by Irma. Contact Anne Vickers at the Diocesan Office if you or your ministry can help reach the individuals in your community who still suffer after this storm.

## The Episcopal Diocese of Southwest Florida

DaySpring Episcopal Center  
8005 25th Street East  
Parrish, FL 34219  
(941) 556-0315  
[www.episcopalswfl.org](http://www.episcopalswfl.org)



## St. Andrew's, Boca Grande Red Bag Ministry

It all started with a little red bag...

At the beginning of each month (and then throughout the month) we invite parishioners to pick up a Red Bag on their way out of church. In the side pocket they find a shopping list for the outreach organization we are supporting for that month. Parishioners take the shopping bag and list and fill it according to their own financial abilities. (They don't need to purchase every item...though many do).

Everyone is asked to return the bag by the end of the month. We then have volunteers who unpack the bags and sort through the items and repack them in boxes to go to the identified charity.

From November 1 - March 30 we collected more than 550 bags, with an estimated value of items purchased by parishioners of \$21,200. We focus on protein-rich foods like canned hams, tuna, and peanut butter.

### Recipients of the Red Bag Donations:

November and December	St. James Food Pantry
January	Soldier's Boxes (items re-packaged and sent to troops overseas)
February	St. James Food Pantry
March	Share the Blessings (non-profit in Port Charlotte that helps the homeless)

We started this ministry in January 2017 and it has been a wonderful success. Parishioners love the hands-on approach to helping others. One parishioner told me that when she goes shopping she takes the red bag with her. As she shops for her own personal items she is reminded how fortunate she is and so feels more generous in filling the red bag there in her cart. "I like to slip in a few extra items that a family might need!"

Another person commented that the checkout girls at the local Publix can identify our bags on site. "Oh you must go to St. Andrew's" followed by a chuckle and a smile. Evangelism and Outreach all rolled into one!

The Rev. Michelle Robertshaw  
Rector





# Anticipated Impact



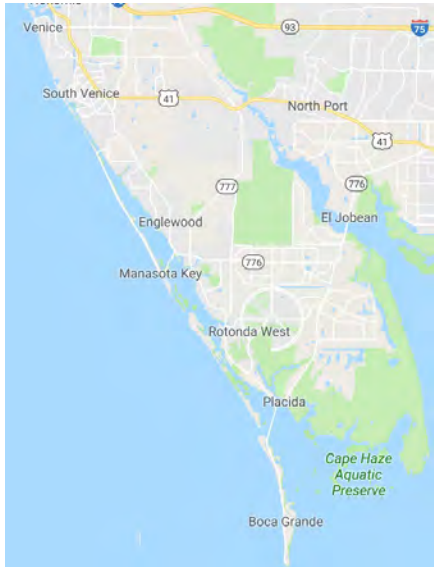
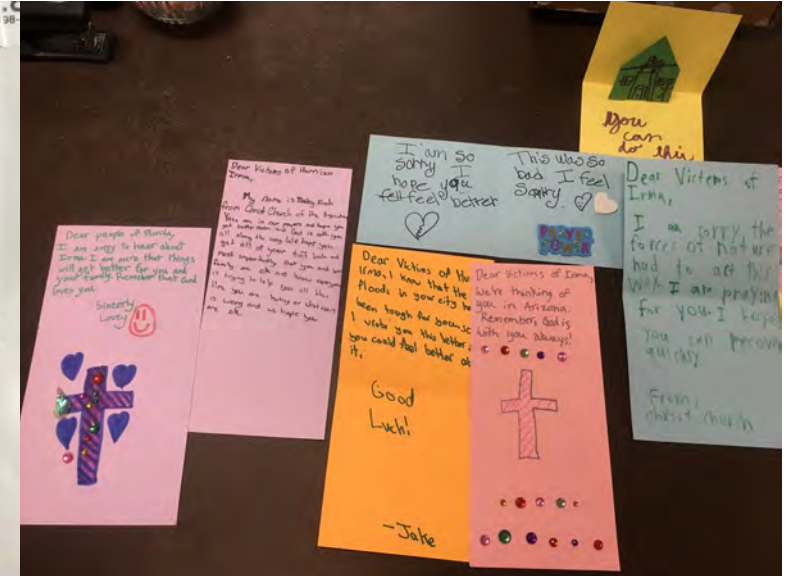
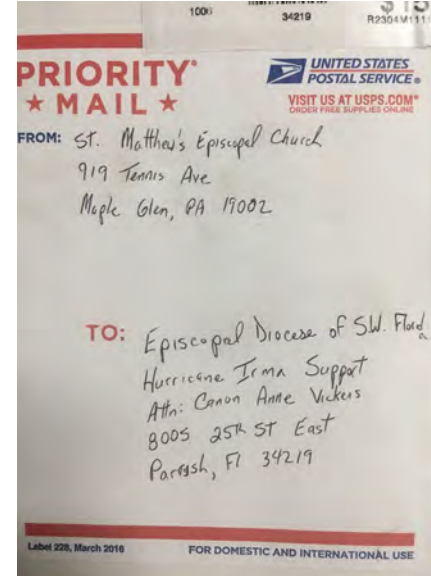
## CONGREGATION RESOURCES



DAYSPring  
SUMMER CAMP

### Adopt-a-Camper Scholarship Donation Form 2019 DaySpring Summer Camp

ST. DAVID'S  
EPISCOPAL CHURCH  
JUBILEE CENTER  
*Reaching out to the Community*  
941-681-3550



GRACE EPISCOPAL CHURCH  
A PARISH IN THE DIOCESE OF SOUTHWEST FLORIDA (ANGLICAN COMMUNION)

"First Fruits" Grant Application

Date: March 10, 2019 Date Received by Committee: \_\_\_\_\_  
Name of Applicant/Contact Person: Rev. Edward R. Rich  
Name of Organization: St. Elizabeth's Episcopal Church  
Address: 6855 11th Street Zephyrhills FL 33502



St. Elizabeth Episcopal Church  
Zephyrhills, FL



Capital Campaign  
2019



# Strategic Visioning – 200 years ago



STATEMENT OF THE CHURCH PROPERTIES FIRE INSURANCE CORPORATION DECEMBER 31, 1932	
ASSETS	LIABILITIES
Cash . . . . \$115,139.09	Premium Reserve . . \$119,142.52
Bonds . . . . 306,882.44	Reserve for Unpaid Losses . 2,123.82
Collateral Loans . . 32,000.00	Reserve for Contingencies . 30,782.44
Balance due from Agents . 9,485.27	All other Liabilities . . 13,547.94
Accrued Interest . . 4,400.38	Capital \$200,000.00
	Surplus 102,310.46
	Surplus to Policyholders . 302,310.46
\$467,907.18	\$467,907.18

# Strategic Visioning – Next 200 years

Thrilled to see:

- **Endowment and capital** structures in place and functioning – flexible legacies established by past generations for future generations
- **Sustainability**, in 100+ potential ways, as a routine focus in the local context
- Significant, potentially catastrophic **risks clearly understood and managed**
- **Articulating and measuring mission**, and using it as our guide



Transparency and Accountability

Frameworks for Understanding

Data-driven Decisions

Circle of Communication

Anticipated Impact

What inspires congregations  
to make sound financial management  
a priority?





Canon Anne Vickers, CFA  
Canon for Finance and Administration  
Episcopal Diocese of Southwest Florida  
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(941) 556-0315