

Dioceses of the Midwest Stewardship Working Group

Presentation to Diocesan Assembly
October 11, 2016

This Presentation



The purpose of this presentation is 1) to provide a quick update on the work of the Stewardship Working Group and 2) to start phase three Stewardship Working Group project by reviewing proposed standard reporting forms.

Episcopal Blessing

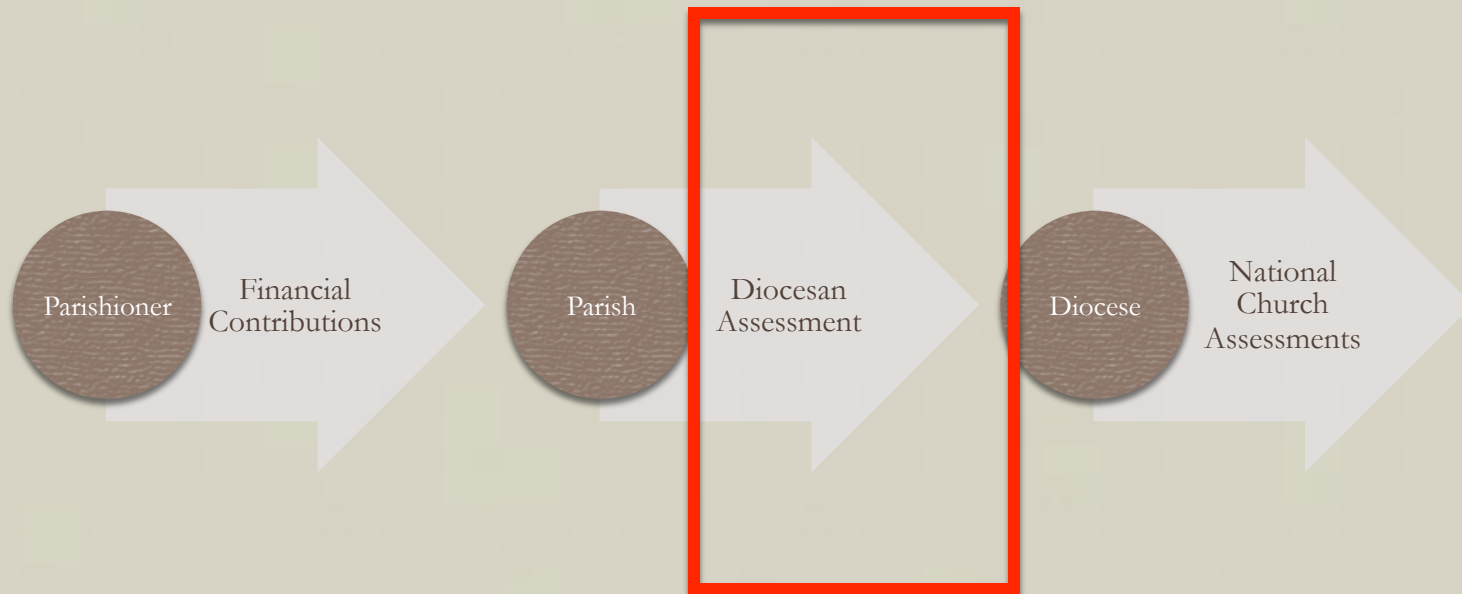
- ☞ As mandated by the 2012 Diocesan Assembly, in early 2015 Bishop Paul has blessed the creation of a stewardship working group.

Goal



The purpose of this project is to present a plan at the 2017 Diocesan Assembly that will transition the Diocesan and OCA assessment from a “Head Tax” assessment to a flat, percentage-based assessment.

What We Are Discussing



Important Things to Remember

- ☞ The Stewardship Group proposal is a funding mechanism.
- ☞ National Church assessments are included in this mechanism.
- ☞ This mechanism dove-tails with the National Church's assessment schedule passed at the 18th AAC (2015).
- ☞ Budgeting and identifying funding priorities is outside the scope of the Stewardship Group.

Why Change?



- ☞ Respond to the to scriptural injunction to tithe
- ☞ Respond to the 18th All-American Council's encouragement to change to a proportional giving model
- ☞ Respond to the 2012 Diocesan Assembly mandate
- ☞ Current “Head Tax” methodology assumes the median household incomes is the same for all parishes
- ☞ A desire for fair and equitable assessments across the Dioceses of the Midwest

Guiding Principles

- ☞ Scriptural injunction to tithe
- ☞ Fairness to parishes
- ☞ Respect for the canonical and statutory responsibilities of the Diocesan Authority
- ☞ Cooperation
- ☞ Sustainability

Data sources



- ❧ 51 (75%) Parishes in the DOM completed a standard data assessment form
- ❧ Dioceses of the Midwest (DOM) provided assessment invoices for 2015 & 2016
- ❧ DOM provided P&L Actual vs Plan for 2013, 2014, 2015 and 2016 Budget
- ❧ Orthodox Church in America (OCA) provided their percentage assessment plan for 2016 through 2018 for all Dioceses

Phases of the Project



Bishop PAUL's letter to the Diocese on October 1, 2015 set out three phases to this project:

1. Collection financial data – 75% response
2. Analysis financial data – plan developed
3. Open for comment – NEXT STEP

Open for Comment Phase



REMINDERS:

1. This document is the product of many hours of analysis and consultation.
2. While the Stewardship Working Group is happy to answer questions about the proposal, we strongly encourage questioners to read, think about, and otherwise inwardly digest the proposal before asking questions.
3. Despite being volunteers, the Stewardship Working will answer questions in a timely manner.
4. The Stewardship Working Group intends to publish questions asked in a FAQ format.

Parish Assessment Policy Proposal

1. Review Policy
2. Review Standard Reporting Form

Questions and Comments?



Questions and comments can be addressed to the Stewardship Working Group at midwestdiocesestewardship@gmail.com.