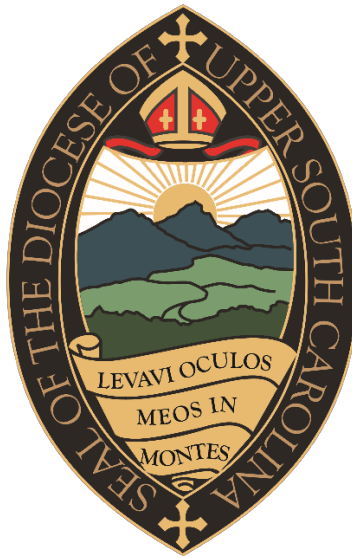


101ST ANNUAL CONVENTION

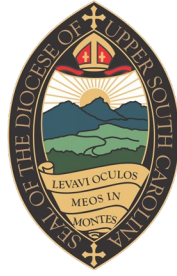
NOVEMBER 10 & 11, 2023

CHRIST CHURCH EPISCOPAL
GREENVILLE



THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA

CONVENTION MANUAL



101ST ANNUAL CONVENTION

CONVENTION MANUAL

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101ST ANNUAL CONVENTION AGENDA



**101ST ANNUAL DIOCESAN CONVENTION
CHRIST CHURCH EPISCOPAL, GREENVILLE
AGENDA**

FRIDAY, NOVEMBER 10, 2023

ALL SAINTS CENTER - 5:00 P.M.

1. Call to Order and Opening Prayer
2. Welcome from the Host Congregation
3. Opening Remarks and Housekeeping
4. Introduction to Electronic Voting
5. Quorum Call
6. Certification of Quorum
7. Report on Agenda and Dispatch of Business
8. Report of the Credentials Committee
9. Election of Secretary of Convention
10. Election of Treasurer
11. Report of Nominations
12. Report of Committee on Constitution and Canons
13. Presentation of 2023 Treasurer's Report
14. Adjournment

**BISHOP'S BANQUET
CHRIST CHURCH PARISH HOUSE**



**101ST ANNUAL DIOCESAN CONVENTION
CHRIST CHURCH EPISCOPAL, GREENVILLE
AGENDA**

SATURDAY, NOVEMBER 11, 2023

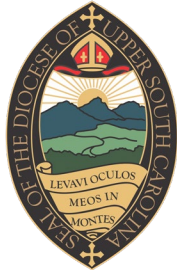
CONVENTION EUCHARIST - CHRIST CHURCH NAVE - 9:00 A.M.

ALL SAINTS CENTER - 10:30 A.M.

1. Call to Order and Opening Prayer
2. Re-Introduction to Electronic Voting
3. Quorum Call
4. Certification of Quorum
5. Report of the Committee on Resolutions
6. Diocesan Elections
7. Changes to Canons
8. Presentation of the 2024 Statement of Mission
9. Bishop Richards's address to Convention
10. Courtesy Resolutions
11. Invitation to the 102nd Convention at Trinity Cathedral, Columbia
12. Report on Agenda and Dispatch of Business
13. Closing Prayer
14. Adjournment



CLERGY TRANSITIONS SINCE THE 100TH ANNUAL CONVENTION



CLERGY ORDINATIONS AND TRANSITIONS SINCE THE 100TH ANNUAL CONVENTION

Ordinations

The Rev. Garrett Ayers to the Priesthood (December 7, 2022 – St. John's, Columbia)

The Rev. Mitchell Felton to the Transitional Diaconate (June 3, 2023 – Trinity Cathedral, Columbia)

The Rev. Christopher Johnson to the Transitional Diaconate (June 3, 2023 – Trinity Cathedral, Columbia)

The Rev. Tyler Proctor to the Transitional Diaconate (June 3, 2023 – Trinity Cathedral, Columbia)

New Calls from Within the Diocese

The Rev. Garrett Ayers, St. John's, Shandon – as Associate Rector

The Rev. Dorian Del Priore, Holy Cross, Simpsonville – as Rector

The Rev. Elizabeth Hendrix, St. Christopher's, Spartanburg – as Priest-in-Charge

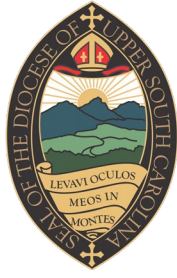
The Rev. Deacon Al Hipp, Church of the Resurrection, Greenwood – as Deacon

The Rev. Christopher Johnson, St. Michael & All Angels, Columbia – as Transitional Deacon and Heathwood Hall Episcopal School, Columbia – as Chaplain

The Rev. Lathrop Mosley, Church of the Ridge, Edgefield/Trenton/ Ridge Springs – as Vicar

The Rev. Tyler Proctor, St. Andrew's, Greenville – as Curate

The Ven. Jane Rogers Wilson, Alexander Diocesan House, Columbia – as Archdeacon



CLERGY ORDINATIONS AND TRANSITIONS SINCE THE 100TH ANNUAL CONVENTION

New Calls from Outside the Diocese

The Rev. Kathryn Beaver, St. John's-Congaree, Hopkins – as Rector

The Rev. Kellan Day, St. James, Greenville – as Rector

The Rev. Douglas Graul, St. Francis of Assisi, Chapin – as Vicar (ELCA)

The Rev. Marshall Jolly, St. Thaddeus, Aiken – as Rector

The Rev. Chuck Messer, St. Peter's, Greenville – as Rector

The Rev. Edmund Pickup, St. Paul's, Fort Mill – as Interim Rector

The Rev. Ray Waldon, Our Saviour, Rock Hill – as Interim Priest in Charge

The Rev. Christiana Walton, Church of the Advent, Spartanburg – as Interim Rector

New Calls Serving Congregations in Another Diocese

The Rev. Mitchell Felton, St. Columba's, Washington D.C., as Curate

Departures from Congregations

The Rev. Tom DiMarco from St. Alban's, Lexington

The Rev. Ned Morris from Church of the Advent, Spartanburg



CLERGY ORDINATIONS AND TRANSITIONS SINCE THE 100TH ANNUAL CONVENTION

Transfers into the Diocese

The Rev. Kathryn Beaver (Dio. Washington)

The Rev. Kellan Day (Dio. Western North Carolina)

The Rev. Marshall Jolly (Dio. Western North Carolina)

Transfers out of the Diocese

The Ven. Dorothy Hazel (Dio. VA)

Clergy Retirements

The Rev. Patricia Sexton, All Saints, Cayce

The Rev. Deborah Apoldo, St. Christopher's, Spartanburg

The Rev. Sally Franklin, St. Paul's, Fort Mill

In Memoriam

The Rev. John Ashmore Brown, Jr. ✠

The Rev. Robert B. Dunbar ✠

The Rev. Ames Swartsfager ✠

The Rev. Johnnie Davis ✠

The Rev. James Nichols ✠

The Rev. Deacon Fred Walters ✠



**NOMINEES FOR SECRETARY AND
ASSISTANT SECRETARY
TO CONVENTION**



**THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA
OFFICE OF THE BISHOP**

**NOMINATION OF SECRETARY AND ASSISTANT SECRETARY
TO THE 101ST ANNUAL DIOCESAN CONVENTION**

To: The President and Members of the Standing Committee

Pursuant to Title II, Canon 4, Section 1 of the Canons of The Episcopal Diocese of Upper South Carolina, I hereby nominate DR. NORAH GRIMALL to serve as Secretary to the 101st Annual Diocesan Convention and MELISSA LANGFORD to serve as Assistant Secretary to the 101st Annual Convention to be held at Christ Church, Greenville on November 10 & 11, 2023, and seek the Standing Committee's consent thereto.

A handwritten signature in black ink, which appears to read "Daniel Paul Richards".

The Rt. Rev. Daniel Paul Richards
IX Bishop of the Episcopal Diocese of Upper South Carolina

DIOCESAN HOUSE
1115 MARION STREET
COLUMBIA, SC 29201



THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA

STANDING COMMITTEE CONSENT TO THE NOMINATION OF THE SECRETARY AND ASSISTANT SECRETARY TO THE 101ST ANNUAL DIOCESAN CONVENTION

Pursuant to Title II, Canon 4, Section 1 of the Canons of The Episcopal Diocese of Upper South Carolina, The Standing Committee, upon vote taken on September 9, 2023, hereby consents to the nomination of DR. NORAH GRIMBALL to serve as Secretary and MS. MELISSA LANGFORD to serve as Assistant Secretary to the 101st Annual Convention to be held at Christ Church, Greenville on November 10 & 11, 2023.

A handwritten signature in black ink, appearing to read "Suzanne Aulsdorff", is written over a horizontal line.

Standing Committee President
The Episcopal Diocese of Upper South Carolina

A handwritten signature in blue ink, appearing to read "Melissa Langford", is written over a horizontal line.

Clerk of the Standing Committee
The Episcopal Diocese of Upper South Carolina

Secretary to the 101st Convention

Dr. Norah Grimball – Trinity Cathedral, Columbia



Dr. Norah T. Grimball is a life-long Episcopalian and a member of Trinity Cathedral where she currently serves as a Worship Leader, Chair of the Eucharistic Ministers, Hospitality Ministers and Lectors as well as Master of Ceremonies for Sunday services. Previous Cathedral service includes Junior and Senior Wardens, Vestry, Finance Committee, Diocesan Convention Delegate, and Eucharistic Visitor.

On the diocesan level, she serves as Secretary to Diocesan Convention, a member of the Commission on The Episcopal Church and the Anglican Communion, Commission on Ministry and Commission on the Diocese and has served previously as a Deputy to General Conventions 2015, 2018, and 2022; Chair of Commission on Ministry, and Communications Chair of the Bishop Search Committee. She is also a spiritual director.

Dr. Grimball has worked primarily in the field of adult education, including several years as Director

of Education and Training for the Computer Services Division at the University of South Carolina. For 28 years she was employed by Teradata Corporation (formerly NCR) where she was a manager in the Training Division, responsible for development and delivery of training to a global audience as well as facilitation of cross-functional teams, workshops, meetings and conference calls. She is a graduate of the University of South Carolina (B.A.), Ohio State University (M.S.), and Graduate Theological Foundation (D. Min.). She holds a certificate in Spiritual Guidance from the Institute for Spirituality at Palmetto Health and has also completed Sewanee's Education for Ministry program.

Assistant Secretary to the 101st Convention

Mrs. Melissa Langford – Grace Episcopal Church, Anderon



I am a cradle Episcopalian and have belonged to Episcopal churches in 9 states, including Grace Church in Anderson, for over 20 years. My husband and I have been married for 40 years. We are the parents of 4 wonderful adults and enjoy spoiling our six grandchildren.

My parish experience includes serving as a Lector, Chalice Bearer, and Lay Eucharistic Visitor, as well as teaching Sunday School, chairing VBS, two terms on the Vestry including serving as secretary, Diocesan Convention Delegate, Confirmation Mentor, BBQ co-chair, and time on various Stewardship, Outreach and Pastoral Care committees.

On the Diocesan level, I have participated in Cursillo, served on staff at Happening, served two terms on the Diocesan Executive Council, served as co-chair of the Nominating Committee in the search for our 9th Bishop, and been part of the Commission on Ministry as a member and chair. I also had the privilege of traveling to Ecuador on a mission trip.

I work with my husband in his financial planning practice and have responsibility for business development, managing social media, and all things

technology related. One of the joys of working with Ken is the flexibility of working remotely and having time to devote to being with our children, grandchildren, and elderly parents. Each day is filled with adventure and opportunity!



**NOMINEES FOR DIOCESAN
TREASURER AND ASSISTANT
DIOCESAN TREASURER**



**THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA
OFFICE OF THE BISHOP**

**NOMINATION OF DIOCESAN TREASURER AND ASSISTANT TREASURER
TO THE 101ST ANNUAL DIOCESAN CONVENTION**

To: The President and Members of the Standing Committee

Pursuant to Title II, Canon 5, Section 1 of the Canons of The Episcopal Diocese of Upper South Carolina, I hereby nominate DR. WILLIAM SANDBERG to serve as Diocesan Treasurer and WEST SUMMERS to serve as Assistant Treasurer for election at the 101st Annual Convention to be held at Christ Church, Greenville on November 10 & 11, 2023, and seek the Standing Committee's consent thereto.

A handwritten signature in black ink, which appears to read "Daniel Paul Richards".

The Rt. Rev. Daniel Paul Richards
IX Bishop of the Episcopal Diocese of Upper South Carolina



THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA

STANDING COMMITTEE CONSENT TO THE NOMINATION OF DIOCESAN TREASURER AND ASSISTANT TREASURER TO THE 101ST ANNUAL DIOCESAN CONVENTION

Pursuant to Title II, Canon 5, Section 1 of the Canons of The Episcopal Diocese of Upper South Carolina, The Standing Committee, upon vote taken on September 9, 2023, hereby consents to The Rt. Rev. Daniel P. Richard's nomination of DR. WILLIAM SANDBERG to serve as Diocesan Treasurer and MR. WEST SUMMERS to serve as Assistant Treasurer for election at the 101st Annual Convention to be held at Christ Church, Greenville on November 10 & 11, 2023.

A handwritten signature in black ink, reading "Suzanne Bulst-Eaton", is written over a horizontal line.

Standing Committee President
The Episcopal Diocese of Upper South Carolina

A handwritten signature in blue ink, reading "John W. [unclear]", is written over a horizontal line.

Clerk of the Standing Committee
The Episcopal Diocese of Upper South Carolina

Nominee for Diocesan Treasurer

Dr. William R. Sandberg (Bill) - St. Timothy's Episcopal Church, Columbia

I would welcome the opportunity to serve as the Diocesan Treasurer. My church experience has prepared me through a combination of work at the parish, convocation, and diocesan levels; my education (particularly in finance) and professional service as a management professor at the University of South Carolina add relevant skills.

A Desire to Serve. I long have believed that EDUSC's future depends critically on its congregations' capacity to revitalize themselves rather than to accept gradual decline. Service on DEC and as its President and on the Commission on the Diocese and the SOM Committee has opened my eyes to the broader challenges and opportunities facing EDUSC.

Our Diocese must use its resources wisely to strengthen the parishes and missions in their efforts to carry out EDUSC's vision, while recognizing that the Diocese's financial resources flow primarily from its congregations. Stewardship of those resources includes improving our budgeting process through clearer and more complete communication, developing and adhering to financial policies and procedures that meet auditors' standards, and encouraging multi-year planning for financial needs.

I bring those perspectives as well as useful experience and professional skills plus a commitment to the imperatives of the Church and our Diocese. I feel called to offer my service to God through EDUSC and pray that it will be accepted.

Experience and Skills. In addition to EDUSC (see above), I have served parishes through vestry and church council leadership, involvement in adult and children's Christian Formation, and choir membership. Three rector's search committees (and seemingly countless faculty search committees) as well as deep involvement in strategic planning and budgeting in parochial, university, and business settings round out my experience. A Ph.D. in Management Policy and M.B.A. and undergraduate degrees in Finance have equipped me with concepts and skills that are helpful in such roles.

Biographical Details

EDUSC: Diocesan Treasurer (2017 – present); Diocesan Executive Council (2012-2014; President, 2014); Commission on the Diocese (since 2008); SOM Committee (2008-16); Delegate from St. Timothy's (2007-2015, 2017).

St. Timothy's (Columbia): Member since 2002. Vestry (2006-09), Rector's Search Committee (2006-07). Established parish's organ endowment fund and capital campaign for building repairs. Taught adult Sunday School (2003-08). Licensed lay worship leader, member of a vocational discernment committee.

Other Church Service. Elsewhere, I have served in the following roles: church council president, vestryman, parish treasurer, diocesan delegate, member of diocesan standing committee, rector/pastor search committee (twice), children's Sunday School teacher (5 years).

Current Employment: Associate Professor of Management, Moore School of Business, University of South Carolina (since 1986; promoted and tenured in 1990).

Education: Ph.D. in Business Administration (Management Policy), University of Georgia, 1984; M.B.A. (Finance), Northwestern University, 1972; B.S. in Business Administration (Finance), Northwestern University, 1970.

Nominee for Assistant Diocesan Treasurer

Mr. West Summers – Trinity Cathedral, Columbia



Service to the Diocese

Currently, West serves on the Commission on the Diocese and its Foundation Investment Committee. Prior, West served on the Nominating Committee for the IX Bishop of the Diocese of Upper South Carolina, the Ecclesiastic Discipline Committee and as a Diocesan Delegate.

Service to the Parish

West is a member of Trinity Episcopal Cathedral. There, he serves as a member of the Vestry with a focus upon the Trinity Learning Center. Additionally, he serves as Head Usher, is a member of the Safety Committee and Men of Trinity. In the past, he served as a Diocesan Delegate, and on various committees including Stewardship, “Created by God” and was a “God and Country” (BSA Scouts) advisor.

Employment

Mr. Summers is a former executive employed in the financial industry for over 35 years with several S&P 500 financial institutions. His expertise includes investment and portfolio management, wealth management, and treasury management. From 2015 to 2018, West was a Senior Assistant State Treasurer for the State of South Carolina and served as the Director of Investment Management. As Director, West was responsible for the investment management of \$19 billion in financial assets.



NOMINEES FOR STANDING COMMITTEE

Diocesan Standing Committee – Clergy Order

The Reverend Rob Brown – Rector, St. Matthew's, Spartanburg



A 'cradle' Episcopalian, I actually grew up at Saint Matthew's before beginning college in the late 1970s. I returned to the parish as the Rector in 2003 having previously served as Deacon at Saint Francis of Assisi in Chapin and Associate Rector of the Church of the Advent in Spartanburg. Prior to seminary I worked as a legislative assistant and aide to Congresswoman Liz Patterson in Washington DC and in Spartanburg.

I am passionate about the work of the Church to bring about the Kingdom of God. We are called, as faithful witnesses and disciples, to proclaim Christ in every way. We do this best when our actions match our words. I believe we have a special obligation to the poor and the outcast, and we must serve as Stewards of God's Creation. I am currently doing doctoral work at Sewanee to sharpen that focus. My family, the outdoors, and

writing round out a very full life.

A graduate of the University of South Carolina with a BA in History, and an MDiv from Sewanee, The University of the South. I have previously served the Diocese as Dean of the Piedmont Convocation, member of the former body Bishop and Council, Chair of the Commission for Young Adult Ministry, Co-Chair of the Commission on Ministry, member of DEC, Vice-President of the Standing Committee and then President of the Standing Committee, and I currently serve on the Board of Examining Chaplains.

I am married to Sandra McGee Brown, an operating room nurse, and we have two adult children, Zachary Sanders Brown (married to Cara Richards) – they are active members of Christ Church, Greenville, and Rebecca Brown Todd (married to Roderick Todd) –they are active members of Saint John's, Lafayette Square, Washington, DC.

The Reverend Beth Hendrix – Vicar, St. Christopher's, Spartanburg



The Rev. Beth Hendrix serves as the Vicar of St. Christophers in Spartanburg. She is a 2021 graduate (M.Div.) of Virginia Theological Seminary. Prior to seminary, she served her parish (Senior Warden, Christian Formation Director, Communications), EDUSC (Long Range Planning committee and DEC member during Bishop Henderson's episcopate, DYLC Event Planner, Secretary of Diocesan Convention, and the Commission on the Diocese during Bishop Waldo's episcopate), and Gravatt Camp and Conference Center (Board of Trustees). Beth is active in the Companions of the Center for Anglican Communion Studies, a membership society for individuals, parishes, dioceses, and institutions seeking to connect with CACS programs supporting a reconciling, intercultural Anglicanism. Originally from Columbus, Ohio, and raised in North Augusta, SC, Beth is an avid golfer, loves history, and is passionate about serving persons who live with cognitive impairment and varied physical abilities. She has two sons,

Preston and Tenison, and two furbabies – Hercules and Dolley Madison. Her mother, Nancy, and brother, Frank, live in Central Florida.

The Reverend Charles Smith – Vicar, St. Michael & All Angels, Columbia



The Rev. Charles Smith presently serves as the vicar at St. Michael and All Angels in Columbia and as a member of the Commission on Ministry and co-chairperson for the Examining Chaplains. He has a passion for discipleship, leadership formation, evangelism, and helping the Church develop healthy patterns of sharing our common life together. He is completing a Doctor of Ministry degree at Gordon Conwell Theological Seminary with a focus on leadership in a changing church context with a specific interest in how digital tools can serve as an on ramp for evangelism and discipleship. He has previously served at St. Matthew's Episcopal Church in Spartanburg, SC, Trinity Episcopal Church in Portsmouth, VA. Charles, Chrissy (his spouse), and Daisy (their dog) enjoy being a part of the EDUSC and St. Michael and All Angels communities.

Diocesan Standing Committee – Lay Order

Karen Whitfield – Church of the Resurrection, Greenwood



Karen Whitfield is a cradle Episcopalian. She currently serves as the Senior Warden of Church of the Resurrection in Greenwood. She is a member of the Daughters of the King, Episcopal Church Women, is the liaison for the pastoral care team, is an Eucharist Visitor, participates in the Women's Bible Study group and will be attending Cursillo in September 2023.

George S. King III, PhD – St. Thaddeus, Aiken **(Received after Deadline)**



I was raised in Columbia, SC where I attended Heathwood Hall Episcopal School from 1st through 12th grade. While in high school I earned my Eagle Scout and was inducted into the Order of the Tartan. After high school I served as an intelligence analyst in the US Army and attended the University of the South and the University of South Carolina. I hold a PhD in Physics and work as a Research Scientist and Program Manager at Savannah River National Laboratory in Aiken SC. My wife and I attended St. John's Episcopal Church in Columbia, SC where we were married and where our oldest son was Baptized. We moved to Aiken in 2007 and attend St. Thaddeus Episcopal Church where my other son was Baptized. I served on the St. Thaddeus Vestry from 2019 to 2021 and was Senior Warden in 2021. I currently serve as the Chair of the St. Thaddeus Building and Maintenance Committee and the

Vice Chair of the Mead Hall Episcopal School Board of Trustees.

Provide specific leadership roles you currently hold and describe important learnings from these experiences;

I am currently a physicist and program manager at the Department of Energy Savannah River National Laboratory (SRNL). As a program manager, I oversee SRNL's IEC/ISO 17025:2017 accreditations and a program that characterizes surplus plutonium for disposition. Within the Diocese of Upper South Carolina, I am currently the Chair of the St. Thaddeus, Aiken Building and Maintenance

Committee and Vice Chair of the Mead Hall Episcopal School Board of Trustees. I also recently (2021) served as the Senior Warden of St. Thaddeus. In all these activities, I have learned to balance needs and resources, and to make decisions based not only on facts and numbers but on the impacts of those decisions. Being a scientist has taught me not to fear being wrong, leading accreditation activities has taught me that even the best organizations are constantly learning and improving, and having leadership roles that can impact large groups of people has taught me to understand those impacts before acting.

List specific skills that you will bring to the Standing Committee;

- ⇒ Program/Project Management: I have been managing Programs at SRNL for approximately five years and projects for ten.
- ⇒ Strategic Planning: I have led accredited laboratory programs for the last five years which require planning and risk management. I am also serving on the Mead Hall Episcopal School Board of Trustees Strategic planning committee where we are currently going through the reaccreditation process.
- ⇒ Youth Education: I have a PhD in physics, served as cub scout and boys adult leadership, and am the Vice Chair of the Mead Hall Episcopal School Board.

As clergy or a communicant in The Episcopal Diocese of Upper South Carolina, which diocesan initiatives do you have passion for and why?

Within the Diocese, I have been a vestry member, a senior warden, and a school board member. I have worked closely with clergy, teachers, and school administrators, and even had the pleasure of recommending a postulant. I find that the mission of the church that I most strongly drawn to is Christian Formation. I have always enjoyed spreading knowledge and helping others.

John Mitchell Holmes III – Church of the Advent, Spartanburg

(Received after Deadline)

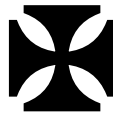


I grew up in a small rural agrarian town in middle Georgia and was raised in the Methodist Church. I graduated from The University of Georgia and started work in New York City and then moved to Chicago. I married my wife of 51 years, Nancy Stewart, and took a job with Milliken and Company in Spartanburg, SC. Nancy is a "cradle" Episcopalian. We married in the Episcopal Church, I was subsequently confirmed by Bishop Alexander of the Diocese of Atlanta, our oldest child was baptized in Atlanta by Rev. Eager Wood and our youngest by Bishop Duval when he was rector at the Advent. The story keeps repeating with their marriages and subsequent baptisms of our grandchildren.

My career afforded me the opportunity to travel both domestically and Internationally and I have truly enjoyed making friends all over the world.

Traveling has opened my eyes to many things about different people, cultures, customs, religions and values. All these things give me better insight into why people do the things they do.

The Episcopal Church of the Advent has been a big part of our lives in many ways. My wife was the youngest and 4th woman elected to the Vestry way back when and she has also served as chair of the Advent Foundation. Among many other church commitments my most satisfying service to the church was as a 30 year member of the Choir. I am now retired but stay busy with volunteering – Church Archives, Advent Men's Bible study, Men's mission trips to Camp Gravett and mobile meals driver among other things.





NOMINEES FOR DISCIPLINARY BOARD

Disciplinary Board – Clergy Order

The Rev. Garrett Ayers – St. John’s-Shandon, Columbia

(Received after Deadline)



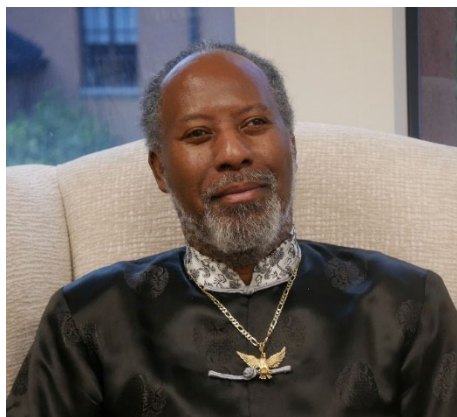
Garrett was born and raised in Columbia, baptized and confirmed at Trinity Cathedral. He attended Clemson University, which is where he began to discern a call to ministry as a priest in the Episcopal Church. Graduating from Clemson in 2018, he moved to St. Andrews, Scotland to complete an MLitt. in Theology and Art, studying scenes of doubt in the Gospel of Mark.

He moved from St. Andrews back to the east-coast for seminary, at Virginia Theological, graduating in 2022. In seminary, Garrett helped to TA courses in the New Testament and Greek, as well as working three years as a student assistant at the Center for Anglican Communion Studies. He spent his senior year reading and writing a thesis on love and repentance.

Garrett has now moved back to Columbia and serves as Assistant to the Rector at St. John’s, Shandon, where he oversees adult formation and coaches a church basketball team. You might catch Garrett riding his bike up and down Devine St., bouncing between coffee shops nearby, or sitting outside somewhere reading comics (probably Spider-Man) and listening to music (probably Miles Davis).

Disciplinary Board – Lay Order

Tyrone Balls – Church of the Cross, Columbia



I was trained as a Registered Nurse and worked as such from 1979 to 2020. My work sites included Providence Hospital and Fairfield Memorial Hospital. In addition to providing clinical service and supervising staff, much of my work included insuring compliance with care standards and ethical guidelines.

I have been a member of Church of the Cross, Columbia for the past 21 years and have served as a Delegate to Diocesan Convention for 15 years.

In addition to my clinical work, I have pursued outreach community service to young and old alike throughout my life.

I am particularly proud of my daughter and son who obtained their educations and have rewarding careers of their own. I would be honored to serve on the Disciplinary Board, as needed, should the Convention see fit.



**NOMINEES FOR
UNIVERSITY OF THE SOUTH
SEWANEE BOARD OF TRUSTEES**

University of the South

Sewanee Board of Trustees – Clergy Order

The Reverend Rob Brown – Rector, St. Matthew's, Spartanburg



A 'cradle' Episcopalian, I actually grew up at Saint Matthew's before beginning college in the late 1970s. I returned to the parish as the Rector in 2003 having previously served as Deacon at Saint Francis of Assisi in Chapin and Associate Rector of the Church of the Advent in Spartanburg. Prior to seminary I worked as a legislative assistant and aide to Congresswoman Liz Patterson in Washington DC and in Spartanburg.

I am passionate about the work of the Church to bring about the Kingdom of God. We are called, as faithful witnesses and disciples, to proclaim Christ in every way. We do this best when our actions match our words. I believe we have a special obligation to the poor and the outcast, and we must serve as Stewards of God's Creation. I am currently doing doctoral work at Sewanee to sharpen that focus. My family, the outdoors, and writing round out a very full life.

A graduate of the University of South Carolina with a BA in History, and an MDiv from Sewanee, The University of the South. I have previously served the Diocese as Dean of the Piedmont Convocation, member of the former body Bishop and Council, Chair of the Commission for Young Adult Ministry, Co-Chair of the Commission on Ministry, member of DEC, Vice-President of the Standing Committee and then President of the Standing Committee, and I currently serve on the Board of Examining Chaplains.

I am married to Sandra McGee Brown, an operating room nurse, and we have two adult children, Zachary Sanders Brown (married to Cara Richards) – they are active members of Christ Church, Greenville, and Rebecca Brown Todd (married to Roderick Todd) –they are active members of Saint John's, Lafayette Square, Washington, DC.



PROPOSED CANONICAL CHANGES



PROPOSED RESOLUTION

**The 101st Convention of the Diocese of Upper South Carolina
CHRIST CHURCH PARISH
GREENVILLE, SOUTH CAROLINA
NOVEMBER 10-11, 2023**

Please return completed forms on or before September 10, 2023

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as “special” resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: June 17, 2023

Offered by: Standing Committee of the Episcopal Diocese of Upper South Carolina

Subject: **Amendment to Title I, Canon 4 – New Subsection 1(e) – Electronic Voting at Convention** *Please see attached Proposed Resolutions and Amendment.*



**THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA
STANDING COMMITTEE**

RESOLUTIONS OF THE STANDING COMMITTEE

Amendment to Title I, Canon 4 – New Subsection 1(e) – Electronic Voting at Convention

WHEREAS, Diocesan Convention of the Episcopal Diocese of Upper South Carolina (“EDUSC”) has previously permitted voting and tabulation of votes by electronic means at Convention on such terms and conditions as have been approved by Standing Committee; and

WHEREAS, Convention has found electronic voting and tabulating of votes to be more efficient and accurate than manual voting and tabulation of votes; and

WHEREAS, electronic voting and tabulation can produce a written paper record of results of voting; and

WHEREAS, the EDUSC Canons (“Canons”) do not currently provide specifically for electronic voting at Convention; and

WHEREAS, the Standing Committee believes it appropriate to amend Title I, Canon 4, Section 1 of the Canons to add a new subsection (e) to provide specifically for electronic voting and tabulation of votes at any Convention upon recommendation of the Standing Committee and on such terms and conditions as may from time to time be adopted and/or amended by the Standing Committee upon advice of the Chancellor of the Diocese; and

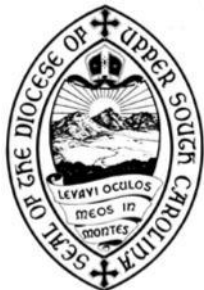
WHEREAS, the Standing Committee proposes that such proposed canonical amendment be submitted to the 101st EDUSC Annual Convention for approval.

NOW, THEREFORE, BE IT RESOLVED, that Title 1, Canon 4, Section 1 of the Canons of the Episcopal Diocese of Upper South Carolina be, and upon approval by the 101st Convention, hereby is, amended to include a new subsection (e) as set forth below:

(e) Electronic voting at Convention. Electronic voting and tabulation of votes shall be permitted at any Convention upon recommendation of the Standing Committee and on such terms and conditions as may from time to time be adopted and/or amended by the Standing Committee upon advice of the Chancellor of the Diocese, provided a paper record of the results of voting is produced and maintained, either in paper or electronic format, in the permanent records of the Diocese. The determination whether to permit electronic voting shall be made by the Standing Committee with respect to each Convention.

RESOLVED, that adoption of the foregoing amendment to Title I, Canon 4, Section 1 be submitted to the 101st Diocesan Convention for approval; and, further,

RESOLVED, that the President of the Standing Committee or his/her designee complete all such forms and take all such actions as are necessary or appropriate to submit such resolution to the Secretary of the 101st EDUSC Convention to be voted on by such Convention.



PROPOSED RESOLUTION

**The 101st Convention of the Diocese of Upper South Carolina
CHRIST CHURCH PARISH
GREENVILLE, SOUTH CAROLINA
NOVEMBER 10-11, 2023**

Please return completed forms on or before September 10, 2023

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as “special” resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: June 17, 2023

Offered by: Standing Committee of the Episcopal Diocese of Upper South Carolina

**Subject: Amendment to Title I, Canon 1, Section 4(b) – Lay Members of Convention-
Others who may be accorded seat and voice but no vote**

Please see attached Proposed Resolutions and Amendment.



THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA STANDING COMMITTEE

RESOLUTIONS OF THE STANDING COMMITTEE

Amendment to Title I, Canon 1, Section 4(b) – Others who may be accorded seat and voice, but no vote.

WHEREAS, Title I, Canon 1, Section 4(b) of the Canons of the Episcopal Diocese of Upper South Carolina (“Canons”) currently provides that Lay persons to whom the Canons do not otherwise accord seat and voice at Diocesan Convention may be accorded seat and voice, but no vote, at Convention if nominated by the Bishop and approved by the Standing Committee; and

WHEREAS, the Canons do not currently provide for a similar process to accord seat and voice, but no vote, at Convention to Clergy to whom the Canons do not otherwise accord seat and voice; and

WHEREAS, upon nomination by the Bishop, Convention has, nonetheless, historically voted to afford seat and voice, but no vote, at Convention to certain non-canonically resident Clergy who are licensed to serve in the Diocese, but who are not currently providing extended service as rectors, vicars or assistants in congregations of the Diocese; and

WHEREAS, although the power to accord seat and voice to persons at Convention would appear to be inherent in the powers of Convention, the Standing Committee believes it appropriate to amend Title I, Canon 1, Section 4(b) to provide specifically for this power, and to provide a process for exercising it, and further to clarify that grant of seat and voice to any persons, whether Lay or Clergy, to whom the Canons do not otherwise accord seat and voice must be approved by Convention; and

WHEREAS, the Standing Committee proposes that such proposed canonical amendment be submitted to the 101st EDUSC Annual Convention for approval.

NOW, THEREFORE, BE IT RESOLVED, that Title I, Canon 1, Section 4(b) of the Canons of the Episcopal Diocese of Upper South Carolina be, and upon approval by the 101st Convention, hereby is, amended to read as set forth below:

SECTION 4. LAY MEMBERS OF CONVENTION

(b) Others who may be accorded seat and voice, but no vote. Such other Lay or Clergy persons as may be nominated by the Bishop and approved by the Standing Committee and by Convention may be accorded seat and voice, but may not vote, at Convention.

And, further,

RESOLVED, that adoption of the foregoing amendment to Title I, Canon 1, Section 4(b) be submitted to the 101st Diocesan Convention for approval; and, further,

RESOLVED, that the President of the Standing Committee or his/her designee complete all such forms and take all such actions as are necessary or appropriate to submit such resolution to the Secretary of the 101st EDUSC Convention to be voted on by such Convention.



PROPOSED RESOLUTION

**The 101st Convention of the Diocese of Upper South Carolina
CHRIST CHURCH PARISH
GREENVILLE, SOUTH CAROLINA
NOVEMBER 10-11, 2023**

Please return completed forms on or before September 10, 2023

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as “special” resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: June 17, 2023

Offered by: Standing Committee of the Episcopal Diocese of Upper South Carolina

Subject: **Amendment to Title X, Canon 1 –Grandfathered Institutions of the Diocese –
New Section 3 (University of the South – term limits for Trustees)**

Please see attached Proposed Resolutions and Amendment.



THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA STANDING COMMITTEE

RESOLUTIONS OF THE STANDING COMMITTEE

Amendment to Title X, Canon 1 – Grandfathered Institutions of the Diocese – New Section 3 (University of the South -- term limits for Trustees)

WHEREAS, The University of the South ("Sewanee") is an existing Institution of the Episcopal Diocese of Upper South Carolina ("EDUSC") as provided in Title X, Canon 1, Section 1 of the Canons of EDUSC; and

WHEREAS, Title X, Canon 1, Section 2 of the EDUSC Canons provides that each Institution of the Diocese: (i) has its own governance documents, which shall not be inconsistent with the EDUSC Canons, and (ii) is managed by its own governing board, which is constituted and chosen in accordance with the requirements of such institution's governance documents; and

WHEREAS, the Constitution and By-Laws of Sewanee ("Sewanee Constitution") provide that the Convention of EDUSC shall elect one clergy and two lay communicants to serve on the Sewanee Board of Trustees for staggered terms of three years ("EDUSC Sewanee Trustees"); and

WHEREAS, neither the Sewanee Constitution nor the EDUSC Canons currently provides for term limits for the EDUSC Sewanee Trustees; and

WHEREAS, in order to provide for greater diversity in representation and opportunities for service as an EDUSC Sewanee Trustee, the EDUSC Standing Committee proposes that any EDUSC Sewanee Trustee who has served a three-year term shall not be eligible for re-election for a period of two years following expiration of such trustee's term in office; and

WHEREAS, the Standing Committee, therefore, proposes an amendment to the EDUSC Canons to provide for such term limits and to address certain other matters relating to election of EDUSC Sewanee Trustees; and

WHEREAS, the Standing Committee proposes that such proposed canonical amendment be submitted to the 101st EDUSC Annual Convention for approval.

NOW, THEREFORE, BE IT RESOLVED, that Title X, Canon 1 of the Canons of the Episcopal Diocese of Upper South Carolina be, and upon approval by the 101st Convention, hereby is, amended to include a new Section 3 as set forth below:

SECTION 3. ELECTION AND TERMS OF TRUSTEES OF THE UNIVERSITY OF THE SOUTH (SEWANEE)

Consistent with the Constitution and By-Laws of Sewanee, Convention shall elect one Clergy and two Lay persons to serve as members of the Board of Trustees of Sewanee ("Sewanee Board"). Such trustees shall serve staggered terms, with one such trustee being elected at each annual Convention to serve for a term of three years. Any trustee who has served two full three-year terms on the Sewanee Board shall not be eligible for re-election for a period of at least two years following expiration of such trustee's term in office. The

Nominating Committee, as defined in Title III, Canon 1, Section 4 of these Canons shall nominate candidates for election to fill unexpired terms created by vacancies occurring between Conventions, subject to maintaining the requirement of one Clergy and two Lay trustees. Such persons shall serve only until termination of the original term, and shall be eligible to be elected by Convention to serve two immediately succeeding three-year terms.

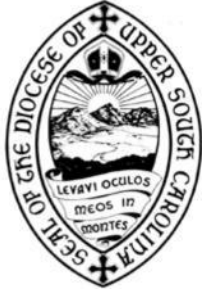
Consistent with the Constitution and By-Laws of Sewanee, the Bishop may appoint an alternate Trustee to attend a meeting of the Sewanee Board if an elected trustee cannot be present.

And, further,

RESOLVED, that adoption of the foregoing amendment to Title X, Canon 1 be submitted to the 101st Diocesan Convention for approval; and, further,

RESOLVED, that the President of the Standing Committee or his/her designee complete all such forms and take all such actions as are necessary or appropriate to submit such resolution to the Secretary of the 101st EDUSC Convention to be voted on by such Convention.

Resolutions adopted by the Standing Committee of the Episcopal Diocese of Upper South Carolina as of June 17, 2023.



PROPOSED AMENDMENT TO THE CANONS OR CHANGE TO CONSTITUTION

**The 101st Convention of the Diocese of Upper South Carolina
CHRIST CHURCH PARISH
GREENVILLE, SOUTH CAROLINA
NOVEMBER 10-11, 2023**

Please return completed forms on or before September 10, 2023

**(per the Canons, forms must be received no later than 60 days prior to Convention to be
considered)**

Completed forms may be submitted via:

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

Date: May 8, 2023

Offered by: Standing Committee of the Episcopal Diocese of Upper South Carolina

**Amendment to Title VIII, Canon 8, Section 1 – Requirements to Become a Parish
(Sufficiency of Part-time Clergy to Qualify for Parish Status)**

Please see attached Proposed Resolutions and Amendment.



**THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA
STANDING COMMITTEE**

RESOLUTIONS OF THE STANDING COMMITTEE

Amendment to Title VIII, Canon 8, Section 1 – Requirements to Become a Parish
(Sufficiency of Part-time Clergy to Qualify for Parish Status)
(March 18, 2023)

WHEREAS, at the 100th Convention of the Episcopal Diocese of Upper South Carolina (“EDUSC”) on November 12, 2022, Convention adopted a resolution proposed by the Gravatt Convocation (the “Resolution”) proposing that the appropriate bodies study, among other related issues, whether a mission should be qualified to become a parish if it meets all of the requirements to become a parish under Title VIII, Canon 8, Section 1, except the requirement of Title VIII, Canon 8, Section 1(a) that the mission be able to provide completely for the support of full-time clergy; and

WHEREAS, the Resolution was based on the premise that a significant percentage of Episcopal congregations currently have part-time clergy, but, nonetheless, meet all other canonical requirements for parish status; and

WHEREAS, the EDUSC Standing Committee has studied this issue, and recognizes that a significant number of congregations employ part-time bi-vocational clergy, and that this practice is likely to become even more prevalent in the coming years; and

WHEREAS, the Standing Committee further recognizes that, in light of the prevalence of this practice, it is not appropriate to withhold parish status and the benefits attendant thereto, including additional delegates to Convention afforded to parishes and a greater degree of autonomy, from mission congregations that otherwise meet all of the requirements to become a parish under Title VIII, Canon 8, Section 1; and

WHEREAS, the Standing Committee, therefore, proposes an amendment to the EDUSC Canons to permit a mission to make application to the Ecclesiastical Authority to become a parish if it meets all of the requirements to become a parish under Title VIII, Canon 8, Section 1, except the requirement of Title VIII, Canon 8, Section 1(a) that the mission be able to provide completely for the support of full-time clergy.

NOW, THEREFORE, BE IT RESOLVED, that Title VIII, Canon 8, Section 1(a) of the Canons of the Episcopal Diocese of Upper South Carolina be, and upon adoption by the 101st Diocesan Convention thereby shall be, amended to read as set forth below (amendment in highlighted text):

TITLE VIII -- PARISHES AND MISSIONS

CANON 8

THE ORGANIZATION OF PARISHES

SECTION 1. REQUIREMENTS TO BECOME A PARISH.

Any organized Mission that has seventy-five adult confirmed Communicants in Good Standing may make application in writing to the Ecclesiastical Authority to become a

Parish giving a statement of its condition and prospect for maintaining such organization after the following requirements have been met:

(a) It can provide completely for the support of at least one clergy person who is contractually obligated to provide at least 20 hours of service per week to the Parish at a prorated amount equal to or greater than the minimum approved Diocesan remuneration;

(b) It is able to provide its proportionate share of the support of the Diocese and has maintained financial self-sufficiency for a minimum of two years;

(c) It has, during those two years, undergone evaluation and consultation of its life and ministry by the Ecclesiastical Authority or the designee of the Ecclesiastical Authority;

(d) It has expressed in writing to the Ecclesiastical Authority its desire to become an organized Parish; and

(e) It shall have presented to the Ecclesiastical Authority a certification in the following form:

"We, the undersigned, assembled for the purpose of organizing a Parish of the Episcopal Church at _____ County of _____ of the Diocese of Upper South Carolina, after due notice given, to be known by the name of _____ and we do hereby acknowledge, accede to and adopt the doctrine, discipline and worship, the Constitution and Canons of The Episcopal Church in the United States of America and the Constitution and Canons of the Diocese of Upper South Carolina, and do accordingly appoint A. B. and C. D. to be Wardens, E. F. G. H. J. K., etc to be vestry members of the Parish, to continue in office until others be chosen in their places.

Witness our hands, this _____ day _____, of the year of our Lord _____."

The petitioners shall enclose the written approval or disapproval of the Clergy or Lay leader(s), the Vestry or the Vestries aforesaid. If any of the Clergy or Lay leaders(s) fail(s) to give either, a certificate of that fact shall be forwarded to the Ecclesiastical Authority.

And, further,

RESOLVED, that adoption of the foregoing amendment to Title VIII, Canon 8, Section 1(a) be submitted to the 101st Diocesan Convention for approval; and, further,

RESOLVED, that Title VIII, Canon 8, Section 1 shall remain otherwise unchanged.



2023 TREASURER'S REPORT

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Summary Report
December 2022**

		December	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Resources (Income)							
3	Episcopal Pledge Income (16%)	\$275,890	\$221,250	\$2,808,838	\$2,655,000.00	105.79%	\$2,655,000	105.79%
	Prior Year Pledge Income	(\$2,242)	\$0	\$0	\$0.00	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$20,922	\$700	\$23,964	\$8,400	285.29%	\$8,400	285.29%
5	Continuing Ed. for Clergy (Endowment)	\$3,546	\$117	\$4,061	\$1,400	290.08%	\$1,400	290.08%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$9,591	\$0	\$115,090	0.00%	\$115,090	0.00%
7	30% Surplus from 2021	\$0	\$6,250	\$0	\$75,000	0.00%	\$75,000	0.00%
8	Episcopal Diocese Grant	\$0	\$3,333	\$40,000	\$40,000	100.00%	\$40,000	100.00%
9	Emergency Congregational Support	\$0	\$0	\$0	\$0	0.00%	\$0	0.00%
10	Total Revenue	\$298,116	\$241,241	\$2,876,864	\$2,894,890	99.38%	\$2,894,890	99.38%
	Expenses:							
26	Commission on Ministry	\$2,152	\$2,833	\$10,741	\$34,000	31.59%	\$34,000	31.59%
35	Commission on Christian Formation	\$2,655	\$3,700	\$16,488	\$44,400	37.14%	\$44,400	37.14%
50	Commission on Congregations	\$9,053	\$12,850	\$132,641	\$154,200	86.02%	\$154,200	86.02%
96	Commission on the Diocese	\$3,508	\$187,506	\$1,943,815	\$2,250,076	86.39%	\$2,250,076	86.39%
102	Commission on TEC & Anglican Communion	\$26,780	\$26,780	\$323,071	\$321,364	100.53%	\$321,364	100.53%
115	Commission on Mission & International Concerns	\$20,995	\$7,571	\$92,831	\$90,850	102.18%	\$90,850	102.18%
116	Total Expenses	\$65,144	\$241,241	\$2,519,587	\$2,894,890	87.04%	\$2,894,890	87.04%
117	Net (over)/under	\$232,972	\$0	\$357,277	\$0		\$0	
	Note: Health Ins. Is prepaid a month in advance.							
	Young Adult Communities: Campus Ministries will be drawing from Investments to cover Expenses using the same budget as 2021 \$51,098.							
	* This is a preaudit/Preadjusted Report							

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Resources (Income)								
3	Episcopal Pledge Income (16%)	\$275,890	\$221,250	124.70%	\$2,808,838	\$2,655,000	105.79%	\$2,655,000	105.79%
	Prior Year Pledge Income	(\$2,242)	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$20,922	\$700	2988.86%	\$23,964	\$8,400	285.29%	\$8,400	285.29%
5	Continuing Ed. for Clergy (Endowment)	\$3,546	\$117	3039.08%	\$4,061	\$1,400	290.08%	\$1,400	290.08%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$9,591	0.00%	\$0	\$115,090	0.00%	\$115,090	0.00%
7	30% Surplus from 2021	\$0	\$6,250	0.00%	\$0	\$75,000	0.00%	\$75,000	0.00%
8	Episcopal Diocese Grant	\$0	\$3,333	0.00%	\$40,000	\$40,000	100.00%	\$40,000	100.00%
9	Emergency Congregational Support	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
10	Total Revenue	\$298,116	\$241,241	123.58%	\$2,876,864	\$2,894,890	99.38%	\$2,894,890	99.38%
	Expenses:								
	Commission on Ministry								
11	COM: Leadership Development	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Ordained Ministry								
12	Clergy Pre-Lenten Retreat	\$0	\$250	0.00%	(\$5,199)	\$3,000	-173.30%	\$3,000	-173.30%
13	Fall Clergy Conference	\$0	\$250	0.00%	\$270	\$3,000	8.99%	\$3,000	8.99%
14	Ministry of Clergy Spouses	\$136	\$125	109.10%	\$477	\$1,500	31.77%	\$1,500	31.77%
15	Deacons	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
16	New Clergy Leadership Development	\$0	\$83	0.00%	\$924	\$1,000	92.43%	\$1,000	92.43%
17	Clergy Continuing Education	\$0	\$125	0.00%	\$2,529	\$1,500	168.57%	\$1,500	168.57%
18	Committee for Retired Clergy/Spouses	\$756	\$208	362.84%	\$1,414	\$2,500	56.58%	\$2,500	56.58%
	Discernment and Theological Ed.								
19	Vocational Discernment	\$0	\$167	0.00%	\$474	\$2,000	23.70%	\$2,000	23.70%
20	Deacon Formation Program	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
21	Theological Education Assistance	\$0	\$667	0.00%	\$8,000	\$8,000	100.00%	\$8,000	100.00%
22	Seminarian Retreat	\$500	\$583	85.71%	\$1,092	\$7,000	15.61%	\$7,000	15.61%
23	Seminarian Travel	\$760	\$125	608.16%	\$760	\$1,500	50.68%	\$1,500	50.68%
24	Seminarian Emergency Funds	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
25	Seminarian Book Funds	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
26	Commission on Ministry	\$2,152	\$2,833	75.97%	\$10,741	\$34,000	31.59%	\$34,000	31.59%

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022**

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
Commission for Christian Formation									
27	Cursillo	(\$1,152)	\$142	-813.18%	(\$9,362)	\$1,700	-550.72%	\$1,700	-550.72%
28	Children's Ministry	\$0	\$217	0.00%	\$4,126	\$2,600	158.69%	\$2,600	158.69%
	General Children's Ministry	\$0	\$25	0.00%	\$103	\$300	34.25%	\$300	34.25%
	5th Grade Bridge Retreat	\$0	\$192	0.00%	\$4,023	\$2,300	174.92%	\$2,300	174.92%
29	Youth Ministry	\$3,807	\$2,933	129.80%	\$20,733	\$35,200	58.90%	\$35,200	58.90%
	Happening	\$2,198	\$1,942	113.19%	\$16,435	\$23,300	70.54%	\$23,300	70.54%
	General Youth Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: Middle School Fall Lock-in	\$1,465	\$54	2704.54%	\$786	\$650	120.92%	\$650	120.92%
	YM: New Beginnings	\$47	\$188	24.96%	\$2,091	\$2,250	92.93%	\$2,250	92.93%
	YM: High School Spring Retreat	\$0	\$333	0.00%	\$250	\$4,000	6.25%	\$4,000	6.25%
	YM: High School Fall Lock-in	\$0	\$54	0.00%	\$3	\$650	0.50%	\$650	0.50%
	YM: EYE: Epis. Youth Event	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: PYE: Provincial Youth Event	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: PYNM: Province Youth Network Mtg	\$0	\$167	0.00%	\$0	\$2,000	0.00%	\$2,000	0.00%
	YM: DYLC: Dioc. Youth Lead. Comm.	\$98	\$196	49.96%	\$1,168	\$2,350.00	49.69%	\$2,350	49.69%
30	Young Adult Communities: Campus Ministries	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
31	Adult Formation Ministry	\$0	\$262.50	0.00%	(\$759)	\$3,150.00	-24.08%	\$3,150	-24.08%
	Safe Church Trainers	\$0	\$45.83	0.00%	\$0	\$550.00	0.00%	\$550	0.00%
	Adult Formation Ministry	\$0	\$216.67	0.00%	(\$759)	\$2,600.00	-29.18%	\$2,600	-29.18%
	Safe Church Trainers <i>*Now included in Adult Formation*</i>								
32	Community of Hope	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
33	Education for Ministry	\$0	\$146	0.00%	\$1,750	\$1,750	100.00%	\$1,750	100.00%
34	Episcopal Church Women	\$0	\$0	0.00%	\$0	\$0.00	0.00%	\$0	0.00%
35	Commission on Christian Formation	\$2,655	\$3,700	71.77%	\$16,488	\$44,400	37.14%	\$44,400	37.14%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission on Congregations</u>								
	<i>Hispanic Ministries</i>								
36	Holy Cross, Simpsonville - Hispanic Ministries	\$0	\$1,808	0.00%	\$4,800	\$21,700	22.12%	\$21,700	22.12%
37	St. Francis, Greenville - Hispanic Ministries	\$2,050	\$2,250	91.11%	\$24,600	\$27,000	91.11%	\$27,000	91.11%
	<i>African American Ministries</i>								
38	St. Thomas, Eastover	\$333	\$333	100.00%	\$4,000	\$4,000	100.00%	\$4,000	100.00%
	<i>New Ways of Being Church</i>								
39	Church of the Cross, Columbia	\$333	\$333	100.00%	\$4,000	\$4,000	100.00%	\$4,000	100.00%
40	Episcopal Service Corps	\$0	\$0	0.00%	(\$1,387)	\$0	0.00%	\$0	0.00%
	<i>Continuing Support</i>								
41	Ascension, Seneca	\$2,250	\$2,250	100.00%	\$27,000	\$27,000	100.00%	\$27,000	100.00%
42	All Saints', Beech Island	(\$330)	\$0	0.00%	(\$330)	\$0	0.00%	\$0	0.00%
43	St. Christopher's, Spartanburg	\$417	\$417	100.00%	\$5,000	\$5,000	100.00%	\$5,000	100.00%
44	St. Bartholomew's, North Augusta	\$1,500	\$1,500	100.00%	\$18,000	\$18,000	100.00%	\$18,000	100.00%
45	Epiphany, Spartanburg	\$0	\$1,000	0.00%	\$11,000	\$12,000	91.67%	\$12,000	91.67%
46	New - St. Francis, Chapin	\$2,083	\$2,083	100.00%	\$25,000	\$25,000	100.00%	\$25,000	100.00%
	<i>Congregational & Stewardship Development</i>								
47	Congregational Workshops	\$0	\$333	0.00%	\$3,321	\$4,000	0.00%	\$4,000	83.02%
48	Congregational Vitality and Sustainability	\$0	\$417	0.00%	\$0	\$5,000	0.00%	\$5,000	0.00%
49	Stewardship (TENS membership)	\$0	\$125	0.00%	\$1,250	\$1,500	83.33%	\$1,500	83.33%
50	Commission on Congregations	\$9,053	\$12,850	70.45%	\$132,641	\$154,200	86.02%	\$154,200	86.02%
	<u>Commission on Convocations</u>								
51	Commission on Convocations	\$0	\$0		\$0	\$0		\$0	
	<u>Commission on the Diocese</u>								
	<i>Clergy Insurance</i>								
52	Group Long-Term Disability	\$1,197	\$1,833	65.29%	\$14,687	\$22,000	66.76%	\$22,000	66.76%
53	Group Insurance - Active Clergy	(\$25,088)	\$56,448	-44.44%	\$618,560	\$677,376	91.32%	\$677,376	91.32%
54	Group Insurance - Retired	(\$674)	\$10,417	-6.47%	\$18,483	\$125,000	14.79%	\$125,000	14.79%
	Subtotal - Clergy Insurance	(\$24,565)	\$68,698	-35.76%	\$651,730	\$824,376	79.06%	\$824,376	79.06%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Office of the Bishop								
55	Bishop Stipend	\$13,250	\$13,250	100.00%	\$159,000	\$159,000	100.00%	\$159,000	100.00%
56	Bishop Pension	\$2,385	\$2,467	96.69%	\$28,620	\$29,600	96.69%	\$29,600	96.69%
57	Bishop Insurance	\$0	\$3,250	0.00%	\$42,453	\$39,000	108.85%	\$39,000	108.85%
58	Bishop's Staff Stipends & Benefits	\$52,518	\$58,875	89.20%	\$640,864	\$706,500	90.71%	\$706,500	90.71%
59	Staff FICA	\$2,247	\$2,167	103.70%	\$22,755	\$26,000	87.52%	\$26,000	87.52%
60	Short-term disability	\$0	\$200	0.00%	\$1,333	\$2,400	55.56%	\$2,400	55.56%
61	Episcopal Visitations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
62	Diocesan House Admin. Expenses	\$4,774	\$12,500.00	38.19%	\$119,549	\$150,000.00	79.70%	\$150,000	79.70%
	51410 - Diocesan House Office Supply	\$2,153	\$1,250	172.24%	\$17,728	\$15,000	118.18%	\$15,000	118.18%
	51415 - Diocesan House Telephone	\$2,751	\$1,583	173.73%	\$17,501	\$19,000	92.11%	\$19,000	92.11%
	51420 - Diocesan House Utilities	\$1,392	\$1,167	119.31%	\$11,909	\$14,000	85.06%	\$14,000	85.06%
	51425 - Diocesan House Postage & Equip.	\$1,500	\$458	327.27%	\$3,289	\$5,500	59.80%	\$5,500	59.80%
	51430 - Diocesan House Copiers	\$482	\$808	59.63%	\$5,161	\$9,700	53.20%	\$9,700	53.20%
	51435 - Diocesan House Elevator	\$0	\$500	0.00%	\$16,209	\$6,000	270.14%	\$6,000	270.14%
	51440 - Diocesan House Computer Maint.	(\$4,159)	\$833	-499.08%	\$19,122	\$10,000	191.22%	\$10,000	191.22%
	51445 - Diocesan House Other Maint.	\$55	\$1,250	4.40%	\$4,027	\$15,000	26.85%	\$15,000	26.85%
	51446 - Diocesan House Document Mgmt. Prog	\$0	\$1,500	0.00%	\$17,005	\$18,000	94.47%	\$18,000	94.47%
	51450 - Diocesan House Janitorial Svc.	\$600	\$625	96.00%	\$7,600	\$7,500	101.33%	\$7,500	101.33%
	51455 - Diocesan House Furniture/Fixtures	\$0	\$2,525	0.00%	\$0	\$30,300	0.00%	\$30,300	0.00%
63	Bishop Travel, Continuing Ed., Hospitality & Cell Phone	(\$4,018)	\$2,500	-160.71%	\$38,465	\$30,000	128.22%	\$30,000	128.22%
	Bishop Travel	(\$7,714)	\$1,667	-462.81%	\$24,773	\$20,000	123.87%	\$20,000	123.87%
	Bishop Continuing Education	\$330	\$417	79.30%	\$5,382	\$5,000	107.65%	\$5,000	107.65%
	Bishop's Hospitality	\$3,366	\$417	807.72%	\$7,382	\$5,000	147.64%	\$5,000	147.64%
	Bishop's Cell Phone	\$276	\$0	#DIV/0!	\$928	\$0	#DIV/0!	\$0	#DIV/0!
64	Canons and Archdeacon Travel	\$3,324	\$2,500	132.98%	\$17,438	\$30,000	58.13%	\$30,000	58.13%
	Canon for Christian Formation - Travel	\$623	\$583	106.77%	\$3,752	\$7,000.00	53.60%	\$7,000	53.60%
	Archdeacon Travel	\$238	\$958	24.79%	\$5,114	\$11,500	44.47%	\$11,500	44.47%
	Canon to the Ordinary Travel	\$2,464	\$958	257.13%	\$8,572	\$11,500	74.54%	\$11,500	74.54%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
65	Non-Canon Staff Conferences/Continuing Ed/Travel	\$391	\$1,250	31.25%	\$3,902	\$15,000	26.01%	\$15,000	26.01%
66	Property manager shared with Trinity	\$1,000	\$1,000	100.00%	\$12,000	\$12,000	100.00%	\$12,000	100.00%
67	DH Capital Maintenance Fund	(\$61,875)	\$833	-7425.00%	\$678	\$10,000	6.78%	\$10,000	6.78%
68	Repayment of Diocesan House Renovations Funds	(\$19,800)	\$1,650	-1200.00%	\$0	\$19,800	0.00%	\$19,800	0.00%
69	Communications (e-DUSC, Web, on-line registrations)	\$3,386	\$2,083	162.53%	\$18,766	\$25,000	75.06%	\$25,000	75.06%
70	Bishop Search Expenditures	\$16,973	\$4,167	407.34%	\$69,949	\$50,000	139.90%	\$50,000	139.90%
	Support for Holy Orders Process								
71	Seminarian Insurance	\$2,651	\$1,000	265.10%	\$5,301	\$12,000	44.17%	\$12,000	44.17%
72	Diocesan Curate Support	\$2,500	\$2,500	0.00%	\$30,000	\$30,000	100.00%	\$30,000	100.00%
	Diocesan Prayer Ministry								
73	Order of the Daughters of the King	\$0	\$0.00	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Subtotal - Office of the Bishop	\$14,554	\$112,191.67	12.97%	\$1,211,073	\$1,346,300	89.96%	\$1,346,300	89.96%
	Bishop's Events:								
74	Clergy Business Day	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
75	Ordinations - Diaconate	\$0	\$83	0.00%	\$521	\$1,000	52.13%	\$1,000	52.13%
76	Ordinations - Priesthood	\$913	\$83	0.00%	\$913	\$1,000	91.34%	\$1,000	91.34%
77	Ordinations - Transitional Diaconate	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
78	Renewal of Vows	\$0	\$42	0.00%	\$98	\$500	19.68%	\$500	19.68%
79	Celebration of New Ministries	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
	Subtotal - Bishop's Events	\$913	\$458	199.30%	\$1,533	\$5,500	27.88%	\$5,500	27.88%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Institutions								
80	All Saints', Clinton for facilities use	\$83	\$83.33	100.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
81	Still Hopes	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
82	Finlay House	\$0	\$42	0.00%	\$500	\$500	100.00%	\$500	100.00%
83	Gravatt	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
84	Univ. of the South School of Theology (Sewanee)	\$0	\$333	0.00%	\$4,000	\$4,000	100.00%	\$4,000	100.00%
85	Voorhees	\$0	\$125	0.00%	\$1,500	\$1,500	100.00%	\$1,500	100.00%
86	Heathwood Hall Episcopal School	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
87	Kanuga	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
	Subtotal - Diocesan Institutions	\$83	\$917	9.09%	\$11,000	\$11,000	100.00%	\$11,000	100.00%
	Diocesan Convention								
88	Diocesan Convention - Leadership & Business Days	\$10,698	\$1,250	855.84%	\$22,846	\$15,000.00	152.30%	\$15,000	152.30%
89	Convention Secretary	\$200	\$200	100.00%	\$2,400	\$2,400	100.00%	\$2,400	100.00%
	Subtotal - Diocesan Convention	\$10,898	\$1,450	955.84%	\$25,246	\$17,400	252.30%	\$17,400	145.09%
	Diocesan Executive Council								
90	Diocesan Executive Council	\$128	\$83	153.24%	\$1,379	\$1,000	137.87%	\$1,000	137.87%
91	D.E.C. Orientation & Planning	\$1,496	\$125	1196.44%	\$44	\$1,500	2.90%	\$1,500	2.90%
92	Audit & Accounting Services	\$0	\$1,667	0.00%	\$18,500	\$20,000	92.50%	\$20,000	92.50%
93	Insurance - Property, Liability, Bond	\$0	\$1,250	0.00%	\$23,086	\$15,000	153.90%	\$15,000	153.90%
94	Real Property Expenses	\$0	\$417	0.00%	\$0	\$5,000	0.00%	\$5,000	0.00%
95	NEW - Diocesan Chancellors	\$0	\$250	0.00%	\$225	\$3,000	7.50%	\$3,000	7.50%
	Subtotal - Diocesan Executive Council	\$1,623	\$3,792	42.81%	\$43,233	\$45,500	95.02%	\$45,500	95.02%
96	Commission on the Diocese	\$3,508	\$187,506	1.87%	\$1,943,815	\$2,250,076	86.39%	\$2,250,076	86.39%
	Comm. on The Episcopal Church & the Anglican Communion								
97	Province IV Pledge	\$0	\$0	#DIV/0!	\$1,980	\$0	#DIV/0!	\$0	#DIV/0!
98	Diocesan Pledge to The Episcopal Church	\$25,114	\$25,114	100.00%	\$301,364	\$301,364	100.00%	\$301,364	100.00%
99	Deputies to General & Synod Convention	\$1,250	\$1,250	100.00%	\$14,727	\$15,000	98.18%	\$15,000	98.18%
100	Lambeth Conference	\$417	\$417	100.02%	\$5,000	\$5,000.00	100.00%	\$5,000	100.00%
101	Ecumenical Relations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
102	Commission on TEC & Anglican Communion	\$26,780	\$26,780	100.00%	\$323,071	\$321,364	100.53%	\$321,364	100.53%

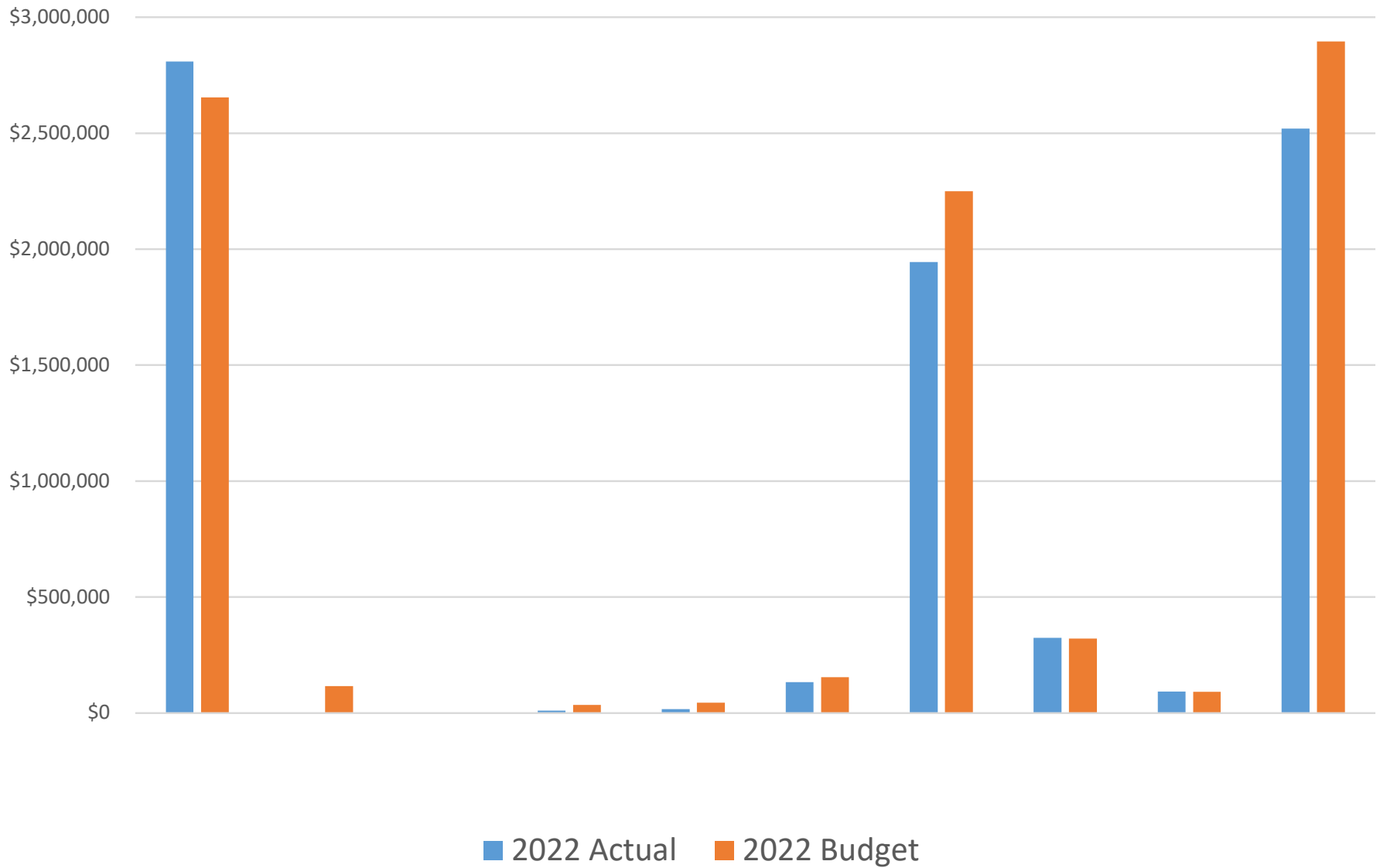
**The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2022**

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
<u>Commission on Mission & International Concerns</u>									
103	Episcopal Relief & Development	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
104	Sustainable Development (Millennium) Goals	\$9,000	\$1,500	0.00%	\$18,000	\$18,000	100.00%	\$18,000	100.00%
105	World Mission Committee - Cange	\$0	\$1,250	0.00%	\$15,786	\$15,000	105.24%	\$15,000	105.24%
106	Ecuador Programs	\$0	\$1,250	0.00%	\$15,000	\$15,000	100.00%	\$15,000	100.00%
107	SC Bishops' Public Education Initiative	\$2,995	\$1,250	239.61%	\$22,514	\$15,000	150.09%	\$15,000	150.09%
108	Camp AIR (Adventures in Reading)	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
109	Matthew 25 Outreach Grants	\$9,000	\$1,333	675.00%	\$15,000	\$16,000	93.75%	\$16,000	93.75%
110	Racial Reconciliation	\$0	\$167	0.00%	\$0	\$2,000	0.00%	\$2,000	0.00%
111	HIV/AIDS Committee	\$0	\$113	0.00%	\$0	\$1,350	0.00%	\$1,350	0.00%
112	Voorhees Scholars Program	\$0	\$417	0.00%	\$6,031	\$5,000	120.62%	\$5,000	120.62%
113	Environmental Stewardship and Justice	\$0	\$125	0.00%	\$0	\$1,500	0.00%	\$1,500	0.00%
114	New - SC Christian Action Council	\$0	\$42	0.00%	\$500	\$500	100.00%	\$500	100.00%
115	Commission on Mission & International Concerns	\$20,995	\$7,571	277.32%	\$92,831	\$90,850	102.18%	\$90,850	102.18%
116	Total Expenses	\$65,144	\$241,241	27.00%	\$2,519,587	\$2,894,890	87.04%	\$2,894,890	87.04%
117	Net (over)/under	\$232,972	\$0		\$357,277	\$0		\$0	

Overview of 2022 Actual Expenditures Compared to 2022 SOM

		2022 Actual	2022 Budget	% of Budget
	<u>Diocesan Resources (Income)</u>			
3	Episcopal Pledge Income (16%)	\$2,808,838	\$2,655,000	105.79%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$115,090	0.00%
10	Total Revenue	\$2,876,864	\$2,894,890	99.38%
	<u>Expenses:</u>			
26	Commission on Ministry	\$10,741	\$34,000	31.59%
35	Commission on Christian Formation	\$16,488	\$44,400	37.14%
50	Commission on Congregations	\$132,641	\$154,200	86.02%
96	Commission on the Diocese	\$1,943,815	\$2,250,076	86.39%
102	Commission on TEC & Anglican Communion	\$323,071	\$321,364	100.53%
115	Commission on Mission & International Concerns	\$92,831	\$90,850	102.18%
116	Total Expenses	\$2,519,587	\$2,894,890	87.04%
117	Net (Deficit) / Surplus	\$357,277	\$0	

Overview of 2022 Actual Expenditures Compared to 2022 SOM

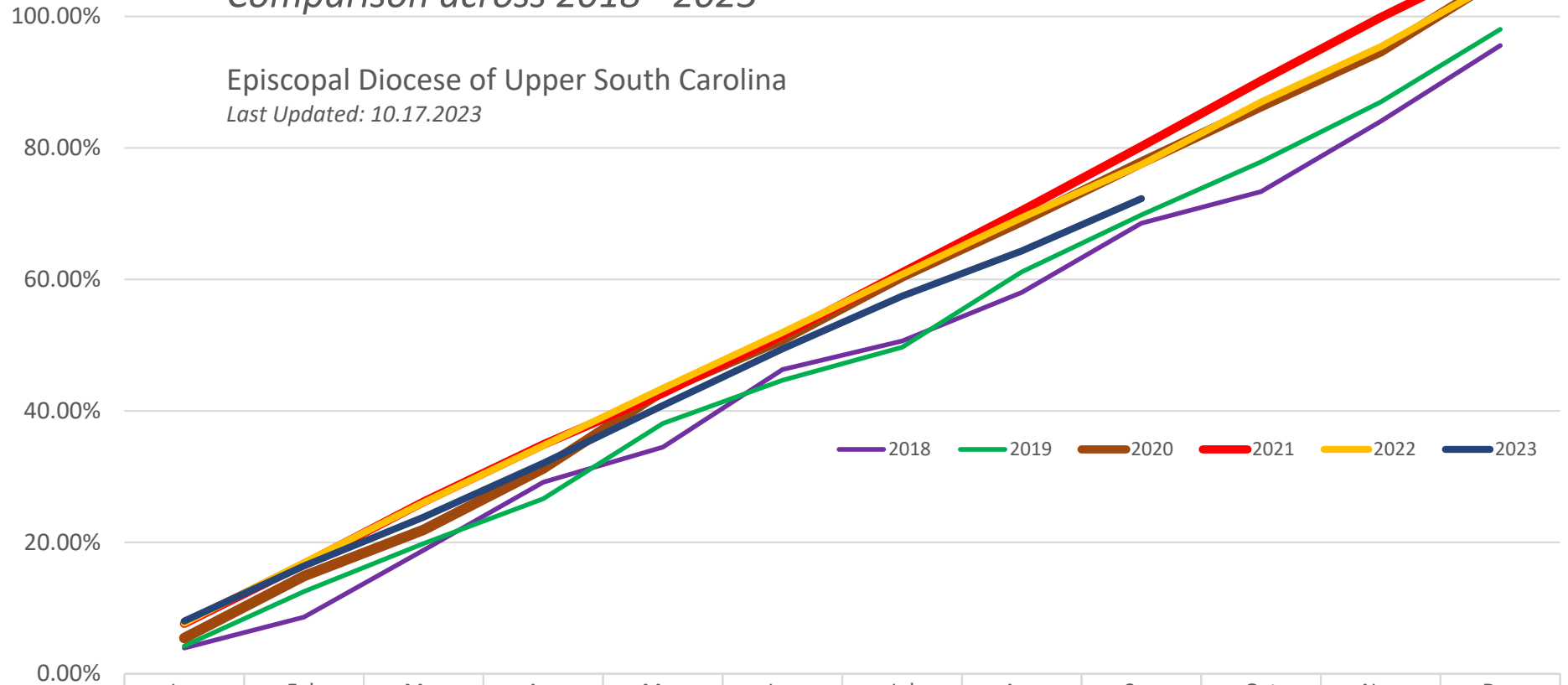


Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2018 - 2023

Episcopal Diocese of Upper South Carolina

Last Updated: 10.17.2023



	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2018	3.93%	8.63%	18.81%	29.15%	34.48%	46.29%	50.63%	58.02%	68.55%	73.35%	84.04%	95.58%
2019	4.24%	12.52%	19.83%	26.63%	38.09%	44.66%	49.69%	61.15%	69.81%	77.88%	86.98%	98.04%
2020	5.44%	14.87%	21.91%	31.24%	43.05%	50.87%	60.47%	68.89%	77.77%	86.35%	94.71%	105.98%
2021	7.65%	16.69%	26.17%	34.87%	42.68%	51.53%	61.04%	70.46%	80.23%	90.21%	99.86%	108.82%
2022	7.70%	16.91%	26.06%	34.72%	43.44%	51.94%	60.77%	69.39%	77.45%	86.99%	95.40%	105.56%
2023	8.03%	16.41%	23.84%	32.04%	40.82%	49.44%	57.46%	64.33%	72.29%			

September 2023 SOM Summary Report

		September	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Diocesan Resources (Income)</u>							
3	Episcopal Pledge Income (16%)	\$222,860	\$233,333	\$2,024,116	\$2,100,000	96.39%	\$2,800,000	72.29%
	Prior Year Pledge Income	\$0	\$0	\$9,053	\$0.00	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$2,133	\$458	\$5,145	\$4,125	124.73%	\$5,500	93.55%
5	Continuing Ed. for Clergy (Endowment)	\$361	\$78	\$872	\$698	125.01%	\$930	93.76%
6	Transfer from Diocesan Endowment Portfolio	\$0	\$12,939	\$0	\$116,453	0.00%	\$155,270	0.00%
7	30% Surplus from 2021	\$0	\$7,333	\$0	\$66,000	0.00%	\$88,000	0.00%
8	Transfer from Canterbury funds for Young Adult Min	\$0	\$3,992	\$0	\$35,925	0.00%	\$47,900	0.00%
9	Total Revenue	\$225,354	\$258,133	\$2,039,186	\$2,323,200	87.77%	\$3,097,600	65.83%
	Expenses:							
21	Commission on Ministry	(\$14,760)	\$4,754	(\$1,374)	\$42,788	-3.21%	\$57,050	-2.41%
25	Commission on Christian Formation	\$711	\$9,092	\$59,595	\$81,828	72.83%	\$109,104	54.62%
38	Commission on Congregations	\$8,000	\$11,100	\$75,567	\$99,900	75.64%	\$133,200	56.73%
82	Commission on the Diocese	\$176,443	\$194,565	\$1,583,611	\$1,751,084	90.44%	\$2,334,779	67.83%
88	Commission on TEC & Anglican Communion	\$27,338	\$27,338	\$246,144	\$246,042	100.04%	\$328,056	75.03%
101	Commission on Mission & International Concerns	\$2,435	\$9,408	\$69,841	\$84,675	82.48%	\$112,900	61.86%
102	Total Expenses	\$200,167	\$256,257	\$2,033,384	\$2,306,317	88.17%	\$3,075,089	66.12%
103	Net (over)/under	\$25,188	\$1,876	\$5,802	\$16,883		\$22,511	

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Summary Report
September 2023**

		September	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Resources (Income)							
3	Episcopal Pledge Income (16%)	\$222,860	\$233,333	\$2,024,116	\$2,100,000	96.39%	\$2,800,000	72.29%
	Prior Year Pledge Income	\$0	\$0	\$9,053	\$0.00	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$2,133	\$458	\$5,145	\$4,125	124.73%	\$5,500	93.55%
5	Continuing Ed. for Clergy (Endowment)	\$361	\$78	\$872	\$698	125.01%	\$930	93.76%
6	Transfer from Diocesan Endowment Portfolio	\$0	\$12,939	\$0	\$116,453	0.00%	\$155,270	0.00%
7	30% Surplus from 2021	\$0	\$7,333	\$0	\$66,000	0.00%	\$88,000	0.00%
8	Transfer from Canterbury funds for Young Adult Mi	\$0	\$3,992	\$0	\$35,925	0.00%	\$47,900	0.00%
9	Total Revenue	\$225,354	\$258,133	\$2,039,186	\$2,323,200	87.77%	\$3,097,600	65.83%
	Expenses:							
21	Commission on Ministry	(\$14,760)	\$4,754	(\$1,374)	\$42,788	-3.21%	\$57,050	-2.41%
25	Commission on Christian Formation	\$711	\$9,092	\$59,595	\$81,828	72.83%	\$109,104	54.62%
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101	Commission on Mission & International Concerns	\$2,435	\$9,408	\$69,841	\$84,675	82.48%	\$112,900	61.86%
102	Total Expenses	\$200,167	\$256,257	\$2,033,384	\$2,306,317	88.17%	\$3,075,089	66.12%
103	Net (over)/under	\$25,188	\$1,876	\$5,802	\$16,883		\$22,511	
	Note: Health Ins. Is prepaid a month in advance.							
	Young Adult Communities: Campus Ministries will be drawing from Investments.							

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2023

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	Diocesan Resources (Income)								
3	Episcopal Pledge Income (16%)	\$222,860	\$233,333	95.51%	\$2,024,116	\$2,100,000	96.39%	\$2,800,000	72.29%
	Prior Year Pledge Income	\$0	\$0	0.00%	\$9,053	\$0	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$2,133	\$458	465.33%	\$5,145	\$4,125	124.73%	\$5,500	93.55%
5	Continuing Ed. for Clergy (Endowment)	\$361	\$78	466.36%	\$872	\$698	125.01%	\$930	93.76%
6	Transfer from Diocesan Endowment Portfolio	\$0	\$12,939	0.00%	\$0	\$116,453	0.00%	\$155,270	0.00%
7	Transfer of 30% of 2021 projected surplus	\$0	\$7,333	0.00%	\$0	\$66,000	0.00%	\$88,000	0.00%
8	Transfer from Canterbury Funds for Young Adult Ministry	\$0	\$3,992	0.00%	\$0	\$35,925	0.00%	\$47,900	0.00%
9	Total Revenue	\$225,354	\$258,133	87.30%	\$2,039,186	\$2,323,200	87.77%	\$3,097,600	65.83%
	Expenses:								
	Commission on Ministry								
10	COM: Leadership Development	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
	Clergy Continuing Education and Development								
11	Clergy Continuing Education and Development (Priest & De	(\$14,760)	\$1,500	0.00%	(\$9,321)	\$13,500	-69.04%	\$18,000	-51.78%
12	Ministry of Clergy Spouses	\$0	\$317	0.00%	\$0	\$2,850	0.00%	\$3,800	0.00%
13	Ministry to Retired Clergy/Spouses	\$0	\$208	0.00%	\$25	\$1,875	1.34%	\$2,500	1.01%
	Discernment and Theological Ed.								
14	Vocational Discernment	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
15	Diaconate Formation Program	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
16	Theological Education Assistance	\$0	\$667	0.00%	\$0	\$6,000	0.00%	\$8,000	0.00%
17	Seminarian Retreat	\$0	\$500	0.00%	\$5,504	\$4,500	122.31%	\$6,000	91.73%
18	Support of Theological Education	\$0	\$417	0.00%	\$0	\$3,750	0.00%	\$5,000	0.00%
19	Discernment Retreat	\$0	\$833	0.00%	\$2,418	\$7,500	32.24%	\$10,000	24.18%
20	Licensed Lay Ministry	\$0	\$21	0.00%	\$0	\$188	0.00%	\$250	0.00%
21	Commission on Ministry	(\$14,760)	\$4,754	-310.47%	(\$1,374)	\$42,788	-3.21%	\$57,050	-2.41%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2023

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission for Christian Formation</u>								
22	Diocesan Formation Retreats	(\$3,649)	\$4,610	-79.15%	\$38,990	\$41,493	93.97%	\$55,324	70.48%
	5th Grade Bridge Retreat	\$0	\$192	0.00%	\$4,282	\$1,725	248.24%	\$2,300	186.18%
	YM: Middle School Fall Lock-in	(\$564)	\$50	-1128.00%	(\$564)	\$450	-125.33%	\$600	-94.00%
	YM: High School Fall Lock-in	\$1,428	\$50	2856.00%	(\$20)	\$450	-4.51%	\$600	-3.38%
	YM: New Beginnings	\$0	\$254	0.00%	\$5,411	\$2,288	236.55%	\$3,050	177.42%
	YM: High School Spring Retreat	(\$1,428)	\$471	-303.29%	\$3,551	\$4,238	83.81%	\$5,650	62.86%
	Happening	\$0	\$1,860	0.00%	\$14,824	\$16,743	88.54%	\$22,324	66.40%
	Vocare	\$0	\$483	0.00%	\$3,521	\$4,350	80.94%	\$5,800	60.70%
	Cursillo	(\$3,085)	\$1,250	-246.80%	\$7,984	\$11,250	70.97%	\$15,000	53.23%
23	Lay Leadership Development	\$4,339	\$4,150	104.56%	\$18,135	\$37,350	48.55%	\$49,800	36.42%
	YM: DYLC: Dioc. Youth Lead. Comm.	\$0	\$350	0.00%	\$585	\$3,150.00	18.57%	\$4,200	13.93%
	YAM: Canterbury Communities (General Expenses)	\$1,783	\$208	855.67%	\$1,467	\$1,875	78.23%	\$2,500	58.67%
	YAM: Clemson Canterbury	\$0	\$250	0.00%	\$1,587	\$2,250	70.55%	\$3,000	52.91%
	YAM: Furman Canterbury	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
	YAM: Presbyterian Coll. Canterbury	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
	YAM: Univ. S.C. Canterbury	\$0	\$375	0.00%	\$1,427	\$3,375	42.30%	\$4,500	31.72%
	YAM: Rock Hill Canterbury	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
	YAM: Spartanburg Canterbury	\$2,557	\$375	681.79%	\$2,668	\$3,375	79.06%	\$4,500	59.30%
	YAM: Clemson Canterbury Stipend	\$0	\$300	0.00%	\$1,400	\$2,700	51.85%	\$3,600	38.89%
	YAM: Furman Canterbury Stipend	\$0	\$450	0.00%	\$3,600	\$4,050	88.89%	\$5,400	66.67%
	YAM: Presbyterian Coll. Canterbury Stipend	\$0	\$150	0.00%	\$0	\$1,350	0.00%	\$1,800	0.00%
	YAM: Univ. S.C. Canterbury Stipend	\$0	\$450	0.00%	\$3,600	\$4,050	88.89%	\$5,400	66.67%
	YAM: Rock Hill Canterbury Stipend	\$0	\$150	0.00%	\$0	\$1,350	0.00%	\$1,800	0.00%
	YAM: Spartanburg Canterbury Stipend	\$0	\$300	0.00%	\$1,800	\$2,700	66.67%	\$3,600	50.00%
	Parish leadership Development	\$0	\$292	0.00%	\$0	\$2,625	0.00%	\$3,500	0.00%
24	Ministry Education and Training	\$20	\$332	6.17%	\$2,470	\$2,985	82.76%	\$3,980	62.07%
	Education for Ministry	\$0	\$167	0.00%	\$1,750	\$1,500	116.67%	\$2,000	87.50%
	Adult Formation Ministry	\$20	\$108.33	0.00%	\$370	\$975.00	38.00%	\$1,300	28.50%
	Safe Church Trainers	\$0	\$56.67	0.00%	\$350	\$510.00	68.63%	\$680	51.47%
25	Commission on Christian Formation	\$711	\$9,092	7.82%	\$59,595	\$81,828	72.83%	\$109,104	54.62%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2023

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
<u>Commission on Congregations</u>									
<u>Hispanic Ministries</u>									
26	Holy Cross, Simpsonville - Hispanic Ministries	\$0	\$1,808	0.00%	\$0	\$16,275	0.00%	\$21,700	0.00%
27	St. Francis, Greenville - Hispanic Ministries	\$1,667	\$1,667	100.00%	\$15,000	\$15,000	100.00%	\$20,000	75.00%
	Hispanic Ministries - St. Francis	\$1,250	\$1,250	100.00%	\$11,250	\$11,250	100.00%	\$15,000	0.01%
	Hispanic Missioner - Upstate	\$417	\$417	100.00%	\$3,750	\$3,750	100.00%	\$5,000	0.02%
<u>African American Ministries</u>									
28	St. Thomas, Eastover	\$333	\$333	100.00%	\$3,000	\$3,000	100.00%	\$4,000	75.00%
<u>New Ways of Being Church</u>									
29	Church of the Cross, Columbia	\$1,000	\$1,000	100.00%	\$9,000	\$9,000	100.00%	\$12,000	75.00%
30	Episcopal Service Corps	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
<u>Continuing Support</u>									
31	Ascension, Seneca	\$1,667	\$1,667	100.00%	\$15,000	\$15,000	100.00%	\$20,000	75.00%
32	St. Christopher's, Spartanburg	\$833	\$833	100.00%	\$7,500	\$7,500	100.00%	\$10,000	75.00%
33	Epiphany, Spartanburg	\$0	\$417	0.00%	\$2,068	\$3,750	55.14%	\$5,000	41.36%
34	St. Marks, Chester	\$2,500	\$2,500	100.00%	\$22,500	\$22,500	100.00%	\$30,000	75.00%
<u>Congregational & Stewardship Development</u>									
35	Congregational Workshops	\$0	\$333	0.00%	\$0	\$3,000	0.00%	\$4,000	0.00%
36	Congregational Vitality and Sustainability	\$0	\$417	0.00%	\$0	\$3,750	0.00%	\$5,000	0.00%
37	Stewardship (TENS membership)	\$0	\$125	0.00%	\$1,499	\$1,125	133.24%	\$1,500	99.93%
38	Commission on Congregations	\$8,000	\$11,100	72.07%	\$75,567	\$99,900	75.64%	\$133,200	56.73%
<u>Commission on Convocations</u>									
39	Commission on Convocations	\$0	\$0		\$0	\$0		\$0	
<u>Commission on the Diocese</u>									
<u>Clergy Insurance</u>									
40	Group Long-Term Disability	\$1,242	\$2,083	59.60%	\$10,873	\$18,750	57.99%	\$25,000	43.49%
41	Group Insurance - Active Clergy	\$68,034	\$61,000	111.53%	\$549,337	\$549,000	100.06%	\$732,000	75.05%
42	Group Insurance - Retired	\$1,505	\$2,083	72.22%	\$15,886	\$18,750	84.73%	\$25,000	63.54%
	Subtotal - Clergy Insurance	\$70,780	\$65,167	108.61%	\$576,096	\$586,500	98.23%	\$782,000	73.67%

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2023**

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
Office of the Bishop									
43	Bishop Stipend	\$15,417	\$15,417	100.00%	\$138,750	\$138,750	100.00%	\$185,000	75.00%
44	Bishop Pension	\$2,775	\$2,775	100.00%	\$24,975	\$24,975	100.00%	\$33,300	75.00%
45	Bishop Insurance	\$3,517	\$3,640	96.63%	\$35,173	\$32,759	107.37%	\$43,679	80.53%
46	Bishop's Staff Stipends & Benefits	\$53,675	\$68,750	78.07%	\$533,315	\$618,750	86.19%	\$825,000	64.64%
47	Staff FICA	\$1,965	\$2,167	90.68%	\$18,121	\$19,500	92.93%	\$26,000	69.69%
48	Short-term disability	\$117	\$200	58.56%	\$1,207	\$1,800	67.03%	\$2,400	50.27%
49	Episcopal Visitations	\$808	\$125	0.00%	\$1,992	\$1,125	0.00%	\$1,500	0.00%
50	Diocesan House Admin. Expenses	\$5,091	\$11,083.33	45.93%	\$86,630	\$99,750.00	86.85%	\$133,000	65.14%
51	Bishop Accountable Plan for Business Exp, travel, hospitalit	\$4,283	\$2,833	151.17%	\$28,568	\$25,500	112.03%	\$34,000	84.02%
52	Canons and Archdeacon Travel	\$7,250	\$2,500	289.99%	\$22,363	\$22,500	99.39%	\$30,000	74.54%
53	Non-Canon Staff Accountable Plan for Business ex, travel, f	\$251	\$1,667	15.06%	\$4,730	\$15,000	31.53%	\$20,000	23.65%
54	Property manager shared with Trinity	\$1,000	\$1,000	100.00%	\$9,000	\$9,000	100.00%	\$12,000	75.00%
55	DH Capital Maintenance Fund	\$0	\$833	0.00%	\$0	\$7,500	0.00%	\$10,000	0.00%
56	DH Capital Maintenance Fund Future	\$2,083	\$2,083	100.00%	\$18,750	\$18,750	100.00%	\$25,000	75.00%
57	Communications (e-DUSC, Web, on-line registrations)	\$177	\$2,083	8.50%	\$9,090	\$18,750	48.48%	\$25,000	36.36%
58	Bishop Search Expenditures	\$417	\$417	100.00%	\$3,750	\$3,750	100.00%	\$5,000	75.00%
	Support for Holy Orders Process								
59	Seminarian Insurance	\$0	\$1,000	0.00%	\$0	\$9,000	0.00%	\$12,000	0.00%
60	Diocesan Curate Support	\$5,649	\$2,500	225.98%	\$35,098	\$22,500	155.99%	\$30,000	116.99%
Subtotal - Office of the Bishop		\$104,474	\$121,073	86.29%	\$971,510	\$1,089,659	89.16%	\$1,452,879	66.87%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2023

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Bishop's Events:								
61	Clergy Business Day	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
62	Ordinations - Diaconate	\$0	\$83	0.00%	\$288	\$750	38.42%	\$1,000	28.82%
63	Ordinations - Priesthood	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
64	Ordinations - Transitional Diaconate	\$0	\$83	0.00%	\$542	\$750	72.27%	\$1,000	54.20%
65	Renewal of Vows	\$0	\$83	0.00%	\$552	\$750	73.66%	\$1,000	55.25%
66	Celebration of New Ministries	\$0	\$83	0.00%	\$768	\$750	102.34%	\$1,000	76.75%
	Subtotal - Bishop's Events	\$0	\$500	0.00%	\$3,150	\$4,500	70.00%	\$6,000	52.50%
	Diocesan Institutions								
67	All Saints', Clinton for facilities use	\$333	\$333.33	100.00%	\$3,000	\$3,000	100.00%	\$4,000	75.00%
68	Still Hopes	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
69	Finlay House	\$0	\$42	0.00%	\$500	\$375	133.33%	\$500	100.00%
70	Gravatt	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
71	Univ. of the South School of Theology (Sewanee)	\$0	\$333	0.00%	\$4,000	\$3,000	133.33%	\$4,000	100.00%
72	Voorhees	\$0	\$125	0.00%	\$1,500	\$1,125	133.33%	\$1,500	100.00%
73	Heathwood Hall Episcopal School	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
	Subtotal - Diocesan Institutions	\$333	\$1,083	30.77%	\$12,000	\$9,750	123.08%	\$13,000	92.31%
	Diocesan Convention								
74	Diocesan Convention - Leadership & Business Days	(\$45)	\$1,667	-2.70%	(\$45)	\$15,000.00	-0.30%	\$20,000	-0.23%
75	Convention Secretary	\$200	\$200	100.00%	\$1,800	\$1,800	100.00%	\$2,400	75.00%
	Subtotal - Diocesan Convention	\$155	\$1,867	97.30%	\$1,755	\$16,800	99.70%	\$22,400	7.83%
	Diocesan Executive Council								
76	Diocesan Executive Council	\$0	\$125	0.00%	\$368	\$1,125	32.74%	\$1,500	24.56%
77	D.E.C. Orientation & Planning	\$0	\$333	0.00%	\$80	\$3,000	2.67%	\$4,000	2.01%
78	Audit & Accounting Services	\$0	\$2,083	0.00%	\$0	\$18,750	0.00%	\$25,000	0.00%
79	Insurance - Property, Liability, Bond	\$700	\$1,667	42.00%	\$18,203	\$15,000	121.35%	\$20,000	91.01%
80	Real Property Expenses	\$0	\$417	0.00%	\$0	\$3,750	0.00%	\$5,000	0.00%
81	NEW - Diocesan Chancellors	\$0	\$250	0.00%	\$450	\$2,250	20.00%	\$3,000	15.00%
	Subtotal - Diocesan Executive Council	\$700	\$4,875	14.36%	\$19,101	\$43,875	43.54%	\$58,500	32.65%
82	Commission on the Diocese	\$176,443	\$194,565	90.69%	\$1,583,611	\$1,751,084	90.44%	\$2,334,779	67.83%

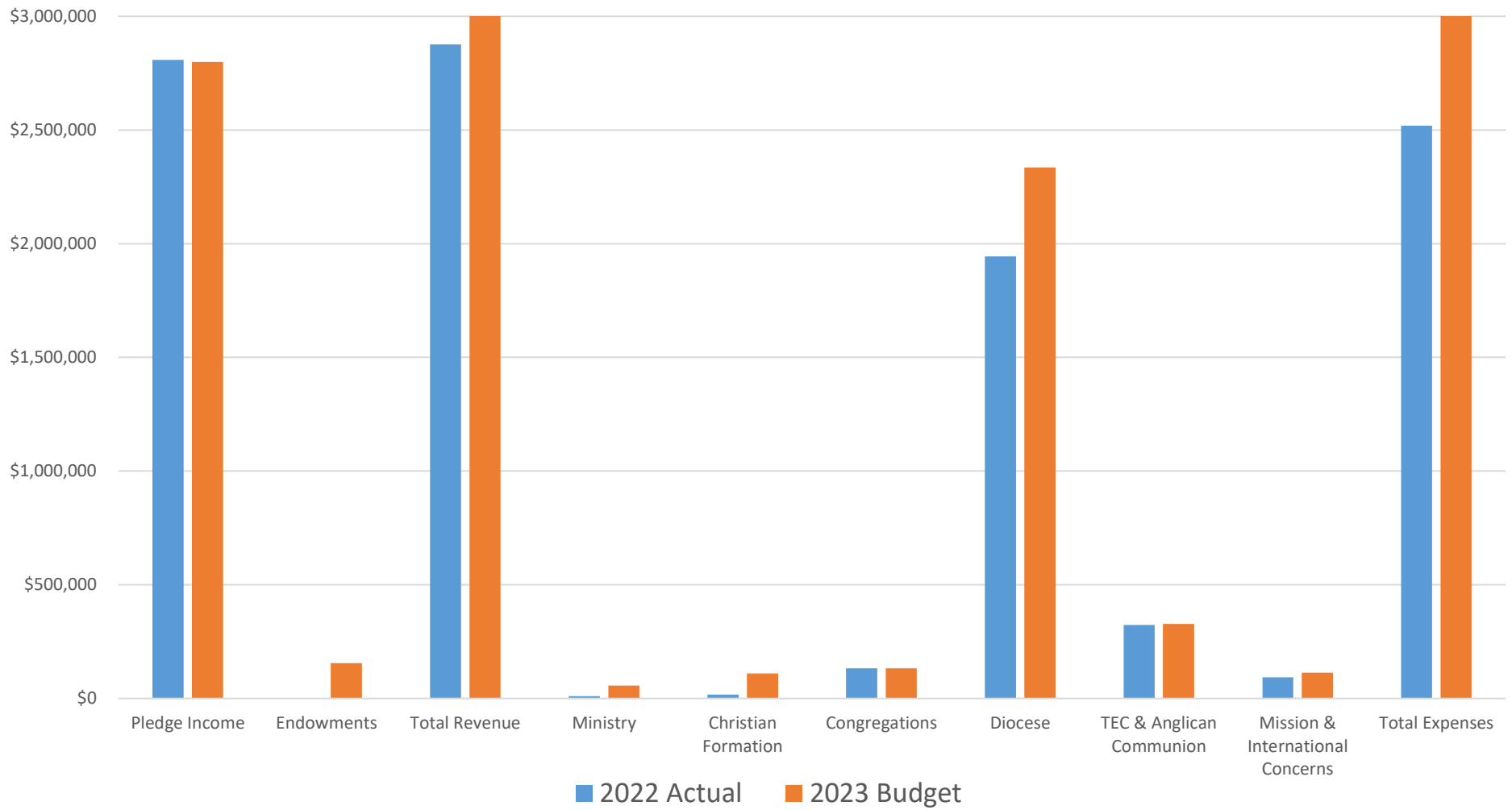
**The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2023**

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
<u>Comm. on The Episcopal Church & the Anglican Communion</u>									
83	Province IV Pledge	\$208	\$208	100.00%	\$1,868	\$1,868	100.00%	\$2,490	75.00%
84	Diocesan Pledge to The Episcopal Church	\$25,464	\$25,464	100.00%	\$229,175	\$229,175	100.00%	\$305,566	75.00%
85	Deputies to General & Synod Convention	\$1,250	\$1,250	100.00%	\$11,352	\$11,250	100.90%	\$15,000	75.68%
86	Lambeth Conference	\$417	\$417	100.00%	\$3,750	\$3,750.00	100.00%	\$5,000	75.00%
87	Ecumenical Relations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
88	Commission on TEC & Anglican Communion	\$27,338	\$27,338	100.00%	\$246,144	\$246,042	100.04%	\$328,056	75.03%
<u>Commission on Mission & International Concerns</u>									
89	Episcopal Relief & Development	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
90	Sustainable Development (Millennium) Goals	\$0	\$1,658	0.00%	\$9,900	\$14,925	66.33%	\$19,900	49.75%
91	World Mission Committee - Cange	\$148	\$2,917	5.08%	\$30,217	\$26,250	115.11%	\$35,000	86.33%
92	Ecuador Programs	\$0	\$1,250	0.00%	\$0	\$11,250	0.00%	\$15,000	0.00%
93	SC Bishops' Public Education Initiative	\$2,287	\$1,250	182.96%	\$19,725	\$11,250	175.33%	\$15,000	131.50%
94	Camp AIR (Adventures in Reading)	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
95	Matthew 25 Outreach Grants	\$0	\$1,250	0.00%	\$10,000	\$11,250	88.89%	\$15,000	66.67%
96	Racial Reconciliation	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
97	HIV/AIDS Committee	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
98	Voorhees Scholars Program	\$0	\$417	0.00%	\$0	\$3,750	0.00%	\$5,000	0.00%
99	Environmental Stewardship and Justice	\$0	\$167	0.00%	\$205	\$1,500	13.70%	\$2,000	10.27%
100	New - SC Christian Action Council	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
101	Commission on Mission & International Concerns	\$2,435	\$9,408	25.88%	\$69,841	\$84,675	82.48%	\$112,900	61.86%
102	Total Expenses	\$200,167	\$256,257	78.11%	\$2,033,384	\$2,306,317	88.17%	\$3,075,089	66.12%
103	Net (over)/under	\$25,188	\$1,876		\$5,802	\$16,883		\$22,511	

Overview of 2022 Actual Expenditures Compared to 2023 SOM

		2022 Actual	Actual / Actual Total	2023 Budget	Budget / Budget Total
	<u>Diocesan Resources (Income)</u>				
	Episcopal Pledge Income (16%)	\$2,808,838	97.64%	\$2,800,000	90.39%
	Support for Theological Ed. (Endowment)	\$23,964	0.83%	\$5,500	0.18%
	Continuing Ed. for Clergy (Endowment)	\$4,061	0.14%	\$930	0.03%
	Withdrawals from Diocesan Endowment Portfolio	\$0	0.00%	\$155,270	5.01%
	30% Surplus from 2022 (2023)	\$0	0.00%	\$88,000	2.84%
	Episcopal Diocese Grant (2022)	\$40,000	1.39%	\$0	0.00%
	Transfer from Canterbury funds for Young Adult Min (2023)	\$0	0.00%	\$47,900	1.55%
	Total Revenue	\$2,876,864		\$3,097,600	
	<u>Expenses:</u>				
	Commission on Ministry	\$10,741	0.37%	\$57,050	1.84%
	Commission on Christian Formation	\$16,488	0.57%	\$109,104	3.52%
	Commission on Congregations	\$132,641	4.61%	\$133,200	4.30%
	Commission on the Diocese	\$1,943,815	67.57%	\$2,334,779	75.37%
	Commission on TEC & Anglican Communion	\$323,071	11.23%	\$328,056	10.59%
	Commission on Mission & International Concerns	\$92,831	3.23%	\$112,900	3.64%
	Total Expenses	\$2,519,587		\$3,075,089	
	Net (Deficit) / Surplus	\$357,277	12.42%	\$22,511	0.00%

Overview of 2022 Actual Compared to 2023 SOM





INVESTMENT FUND REPORT

**Investment Market Values
September 30, 2023
3Q2023**

**The Episcopal Diocese
of Upper South Carolina**

Fund	Investment	Unrestricted	Temp.Restr.	Perm.Restr.	Total	12/31/2022	%
#	Fund Name	Market Value	Market Value	Market Value	Market Value	Market Value	Change
1001	Bachman		\$188,263.39	\$0.00	\$188,263.39	\$182,592.00	3.11%
1002	Baker		\$17,168.46	\$5,000.00	\$22,168.46	\$21,669.57	2.30%
1003	Calvary/Glenn Springs		\$226,242.34	\$42,532.90	\$268,775.24	\$262,726.67	2.30%
1004	Sophie Carroll		\$6,966.16	\$500.00	\$7,466.16	\$7,298.14	2.30%
1005	Annie Cates		\$6,195.83	\$1,176.00	\$7,371.83	\$7,205.94	2.30%
1006	Honorio Cates		\$18,788.52	\$1,250.00	\$20,038.52	\$19,587.57	2.30%
1007	Hart		\$17,443.68	\$1,000.00	\$18,443.68	\$18,028.60	2.30%
1008	Eliz. La Borde		\$3,480.03	\$250.00	\$3,730.03	\$3,646.07	2.30%
1009	Richard Manning		\$139,916.06	\$10,000.00	\$149,916.06	\$146,542.32	2.30%
1010	Prayer Bk/Tract Society		\$39,550.23	\$2,174.56	\$41,724.79	\$40,785.80	2.30%
1011	Shuler		\$16,028.43	\$1,150.00	\$17,178.43	\$16,791.85	2.30%
1012	Anna Still		\$2,908.54	\$6,000.00	\$8,908.54	\$8,708.06	2.30%
1013	Sulbacher		\$6,630.08	\$650.00	\$7,280.08	\$7,116.25	2.30%
1014	Turnbull Trust		\$35,850.49	\$15,000.00	\$50,850.49	\$49,706.13	2.30%
1015	Corrie Zimmerman		\$7,712.04	\$1,000.00	\$8,712.04	\$8,515.99	2.30%
1016	Mary Zimmerman		\$6,022.84	\$1,000.00	\$7,022.84	\$6,864.79	2.30%
1017	Zimmerman / Squires		\$17,265.56	\$3,000.00	\$20,265.56	\$19,809.50	2.30%
2001	Bp's Permanent Fund		\$318,921.40	\$29,174.11	\$348,095.51	\$337,609.22	3.11%
2002	Trustees' General	\$585,961.83	\$0.00	\$0.00	\$585,961.83	\$568,309.88	3.11%
2003	Operation Reserve	\$88,781.03	\$0.00	\$0.00	\$88,781.03	\$86,106.52	3.11%
2004	Collett Memorial		\$118,728.95	\$0.00	\$118,728.95	\$116,057.05	2.30%
2005	Beattie Foundation		\$66,665.69	\$13,845.01	\$80,510.70	\$78,698.88	2.30%
2006	Cont. Ed. for Clergy		\$23,505.01	\$6,154.99	\$29,660.00	\$28,992.52	2.30%
2007	De Hon Bowen		\$73,703.22	\$4,800.00	\$78,503.22	\$76,736.56	2.30%
2008	Pringle Frost		\$22,924.05	\$1,800.00	\$24,724.05	\$24,167.65	2.30%
2009	Theological Ed.		\$176,076.71	\$5,050.00	\$181,126.71	\$177,050.59	2.30%
2010	Addie Tingley		\$127,805.75	\$35,126.87	\$162,932.62	\$159,265.95	2.30%
2011	Martha Williams		\$177,815.68	\$25,000.00	\$202,815.68	\$198,251.47	2.30%
2012	Henry B. Richardson		\$225,651.43	\$75,000.00	\$300,651.43	\$291,594.38	3.11%
2014	Winthrop College		\$8,011.85	\$1,000.00	\$9,011.85	\$8,740.37	3.11%
2015	Bagwell Trust		\$18,569.81	\$0.00	\$18,569.81	\$18,010.40	3.11%
2016	Partnership Cange		\$1,240,898.78	\$0.00	\$1,240,898.78	\$842,691.42	47.25%
2018	Walker Memorial		\$20,595.37	\$13,186.57	\$33,781.94	\$32,764.26	3.11%
2025	Proceeds from Canterbury-Winthrop sale	\$135,711.83	\$0.00	\$0.00	\$135,711.83	\$131,623.55	3.11%
2027	Proceeds from Union County property sale		\$252,800.32	\$0.00	\$252,800.32	\$247,111.25	2.30%
2031	Campus Ministry Initiative Fund		\$302,412.30		\$302,412.30	\$293,302.20	3.11%
3001	Zion Eastover	\$7,909.46	\$2,913.80	\$2,000.00	\$12,823.26	\$12,436.97	3.11%
<i>Bishop's Legacy Fund:</i>							
2024+							
2028	Healthy Church Foundation	\$140,582.09	\$0.00	\$0.00	\$140,582.09	\$136,347.09	3.11%
2019	Thompson Fund	\$132,582.01	\$0.00	\$0.00	\$132,582.01	\$128,588.01	3.11%
2021	Shafto Fund	\$64,472.43	\$84,577.21	\$0.00	\$149,049.64	\$144,559.56	3.11%
2013	Clippard/New Miss'ns		\$301,588.40	\$0.00	\$301,588.40	\$292,503.13	3.11%
2023	Proceeds from All Souls' sale	\$222,150.53	\$0.00	\$0.00	\$222,150.53	\$215,458.30	3.11%
2029	Proceeds from Clearwater sale	\$62,723.58	\$0.00	\$0.00	\$62,723.58	\$60,834.05	3.11%
2030	Proceeds from St. Matthias sale	\$304,070.87	\$0.00	\$0.00	\$304,070.87	\$294,910.81	3.11%
GROSS TOTAL MARKET VALUE		\$1,744,945.66	\$4,320,598.41	\$303,821.01	\$6,369,365.08	\$5,830,317.29	9.25%
		1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual Totals	
Deposits		\$13,005.00	\$464,644.50	\$323.50		\$477,973.00	
		\$4,480 - Church Funds	\$49,055.410 - Church Funds	\$61 - Church Funds	\$0 - Church Funds		
Withdraws		\$15,377.04	\$8,821.24	\$39,642.19		\$63,840.47	
		\$7,377.04 - Church Funds	\$6,321.24 - Church Funds	\$7,656.19 - Church Funds	\$0 - Church Funds		
NET TOTAL MARKET VALUE							
17 Church/Institution Funds					4,234,166.29	\$4,077,353.11	3.85%
Grand Total Market Value 9/30/2023:					\$10,603,531.37	\$9,997,670.40	7.02%



2023 PLEDGE REPORT

2023 Episcopal Pledge Commitment Report

as of 9.14.2023

Church:	Church City:	2023 Lower Pledge Option	2023 Pledge Accepted	Acceptances / Lower Option
Trinity Episcopal Church	Abbeville	\$ 7,584	\$ 7,584	100.00%
St Augustine of Canterbury	Aiken	\$ 37,469	\$ 37,469	100.00%
St Thaddeus Episcopal Church	Aiken	\$ 123,062	\$ 123,062	100.00%
Grace Episcopal Church	Anderson	\$ 64,421	\$ 64,421	100.00%
St. George's Church	Anderson	\$ 23,222	\$ 23,222	100.00%
All Saints' Episcopal Church	Beech Island	\$ 1,724		0.00%
St Margarets Episcopal Church	Boiling Springs	\$ 21,901		0.00%
Grace Episcopal Church	Camden	\$ 63,541	\$ 63,541	100.00%
All Saints' Episcopal Church	Cayce	\$ 18,429	\$ 12,300	66.74%
St Francis of Assisi	Chapin	\$ 48,834	\$ 48,834	100.00%
St Marks Episcopal Church	Chester	\$ 3,867	\$ 3,867	100.00%
Holy Trinity Episcopal Church	Clemson	\$ 88,567	\$ 25,000	28.23%
All Saints' Episcopal Church	Clinton	\$ 21,720	\$ 21,720	100.00%
Church of the Cross	Columbia	\$ 7,293	\$ 7,864	107.83%
Church of the Good Shepherd	Columbia	\$ 70,294	\$ 71,626	101.89%
St David's Episcopal Church	Columbia	\$ 60,332	\$ 60,332	100.00%
St John's Episcopal Church	Columbia	\$ 166,862	\$ 166,862	100.00%
St Luke's Episcopal Church	Columbia	\$ 38,489	\$ 33,600	87.30%
St Martin's in the Fields	Columbia	\$ 181,973	\$ 165,000	90.67%
St Mary's Episcopal Church	Columbia	\$ 61,157	\$ 61,200	100.07%
St Michael & All Angels'	Columbia	\$ 45,941		0.00%
St Timothy's Episcopal Church	Columbia	\$ 24,695	\$ 20,000	80.99%
Trinity Cathedral Church	Columbia	\$ 509,771		0.00%
St Michael's Episcopal Church	Easley	\$ 28,533	\$ 22,080	77.38%
St Thomas Church	Eastover	\$ 3,680		0.00%
St Paul's Episcopal Church	Fort Mill	\$ 34,448	\$ 22,389	64.99%
Episcopal Church of the Incarnation	Gaffney	\$ 21,696		0.00%
Calvary Episcopal Church	Glenn Springs / Pauline	\$ 6,671	\$ 4,400	65.96%
St Paul's Episcopal Church	Graniteville	\$ 7,684	\$ 4,200	54.66%
St Peter's Episcopal Church	Great Falls	\$ 2,015	\$ 2,015	100.00%

2023 Episcopal Pledge Commitment Report

as of 9.14.2023

Church:	Church City:	2023 Lower Pledge Option	2023 Pledge Accepted	Acceptances / Lower Option
Christ Episcopal Church	Greenville	\$ 458,893	\$ 300,000	65.37%
Church of the Redeemer	Greenville	\$ 43,253	\$ 23,983	55.45%
St Andrew's Episcopal Church	Greenville	\$ 43,307	\$ 43,320	100.03%
St Francis Episcopal Church	Greenville	\$ 1,353		0.00%
St James Episcopal Church	Greenville	\$ 94,440	\$ 94,440	100.00%
St Peter's Episcopal Church	Greenville	\$ 102,032	\$ 103,329	101.27%
St Philip's Church	Greenville	\$ 9,220	\$ 9,508	103.12%
Church of the Resurrection	Greenwood	\$ 66,585	\$ 66,585	100.00%
Church of the Good Shepherd	Greer	\$ 23,924		0.00%
St John's Episcopal Church	Hopkins / Congaree	\$ 9,135	\$ 9,135	100.00%
Epis Ch of St Simon & St Jude	Irmo	\$ 39,287		0.00%
St Barnabas Episcopal Church	Jenkinsville	\$ 8,204	\$ 8,204	100.00%
Christ Episcopal Church	Lancaster	\$ 17,692	\$ 4,000	22.61%
Church of the Epiphany	Laurens	\$ 12,758	\$ 6,000	47.03%
St Alban's Episcopal Church	Lexington	\$ 35,864		0.00%
St Luke's Episcopal Church	Newberry	\$ 11,557		0.00%
St Bartholomew's Episcopal Church	North Augusta	\$ 37,076	\$37,076	100.00%
St Stephen's Episcopal Church	Ridgeway	\$ 12,243	\$ 12,243	100.00%
Episcopal Church of Our Saviour	Rock Hill	\$ 69,434	\$ 69,434	100.00%
Church of the Ascension	Seneca	\$ 6,136	\$ 10,000	162.98%
Holy Cross Episcopal Church	Simpsonville	\$ 77,817	\$ 28,000	35.98%
Episcopal Church of the Advent	Spartanburg	\$ 339,767	\$ 152,895	45.00%
Episcopal Church of the Epiphany	Spartanburg	\$ 1,973		0.00%
St Christopher's Church Episcopal	Spartanburg	\$ 37,868		0.00%
St Matthew's Episcopal Church	Spartanburg	\$ 67,384	\$ 67,384	100.00%
Episcopal Church of the Ridge	Trenton	\$ 27,968	\$ 27,968	100.00%
Church of the Nativity	Union	\$ 9,059	\$ 4,500	49.68%
St John's Episcopal Church	Winnsboro	\$ 7,810	\$ 7,810	99.99%
Church of the Good Shepherd	York	\$ 34,430	\$ 34,430	100.00%
	Total:	\$ 3,502,344	\$ 2,192,832	62.61%
\$ Budgeted in 2023 SOM:	\$2,655,000		46	Total Received
% of 2023 SOM Committed:	82.59%		13	Total Outstanding
			59	



2023 BALANCE SHEET

Funds: DEC,Misc.,Operations,Perm. Restr. Investments,Subsidiaries,Temp. Restr.
Investments,Unrestricted Investments
September 2023

Accounts

Assets		
Bank Accounts		
Operating Account		
Bishop's Trust Fund CIB	\$71,804.15	
Cash in Bank	\$2,406,712.09	
Total Operating Account	\$2,478,516.24	
Money Market		
	\$358,106.37	
Bishop's Discretionary Account		
	\$9,076.42	
Total Bank Accounts		\$2,845,699.03
Investments		
Perm.Inv.-Perm.Restrict.	\$303,820.00	
Perm.Inv.-Temp. Restr.	\$3,563,080.60	
Perm.Investments-Unrest.	\$2,283,092.03	
Total Investments		\$6,149,992.63
Fixed Assets		
Buildings	\$1,187,586.08	
Furniture & Equipment	\$253,222.73	
Land	\$456,042.46	
Total Fixed Assets		\$1,896,851.27
Other Assets		
Accumulated Depreciation	(\$868,039.91)	
Operating Leases Right of Use Asset	\$9,910.01	
Pre-paid Expenses	\$2,152.72	
Total Other Assets		(\$855,977.18)
Accounts Receivables		
A/R Deployment	\$6,815.15	
A/R ECHYP	\$728,850.00	
A/R General	(\$613.41)	
A/R Gravatt	\$96,500.00	
Centennial Campaign Pledge Rec	\$4,000.00	
Pledges Receivable	\$6,052.56	
Total Accounts Receivables		\$841,604.30
A/R Group Health Insurance		(\$25,912.67)
Total Assets		\$10,852,257.38
Liabilities, Fund Principal, & Restricted Funds		
Liabilities		
A/P Year End	(\$1,257.79)	
Annuities Payable	\$968.34	
Investments to Forward	\$325.00	
Operating Lease Liabilities	\$9,910.01	
Total Liabilities		\$9,945.56
Fund Principal		
P.R.N.A.-Investments	\$329,241.50	
T.R.N.A.-Investments	\$3,295,344.34	
Unrestr.N.A.- St. of Miss'n	\$5,606,371.02	
Unrestr.N.A.-Non-SOM	(\$441,170.35)	
Excess Cash Received	\$286,025.49	
Total Fund Principal and Excess Cash Received		\$9,075,812.00
Restricted Funds		
Total Temporary Restricted	\$1,766,499.82	
Total Restricted Funds		\$1,766,499.82
Total Liabilities, Fund Principal, & Restricted Funds		\$10,852,257.38

Episcopal Diocese of Upper SC
Balance Sheet
Funds: DEC,Misc.,Operations,Perm. Restr. Investments,Subsidiaries,Temp. Restr.
Investments,Unrestricted Investments
September 2023

Accounts

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CONGREGATIONAL HEALTH REPORT

EDUSC Congregational Health Report
Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2018-2022

Church Name		Church City		Composite Congregational Health	5 Year Averages				
					Pledge Lower Option	Acceptances/ Lower Option	Payments/ Acceptances	Unaccepted Pledge Per Year	Average Health
Trinity Episcopal Church	Abbeville	Mission	79%	Pledge	\$ 8,745	98%	270%	\$ 181	98%
			Audit						40%
			Parochial						100%
St Augustine of Canterbury	Aiken	Mission	80%	Pledge	\$ 28,150	100%	107%	\$ (0)	100%
			Audit						40%
			Parochial						100%
St Thaddeus Episcopal Church	Aiken	Parish	96%	Pledge	\$ 114,104	87%	95%	\$ 14,595	87%
			Audit						100%
			Parochial						100%
Grace Episcopal Church	Anderson	Parish	93%	Pledge	\$ 58,091	100%	100%	\$ (0)	100%
			Audit						80%
			Parochial						100%
St George Episcopal Church	Anderson	Parish	100%	Pledge	\$ 11,560	100%	100%	\$ (7)	100%
			Audit						100%
			Parochial						100%
All Saints Episcopal Church	Beech Island	Mission	33%	Pledge	\$ 4,300	40%	#NAME?	\$ 2,580	40%
			Audit						0%
			Parochial						60%
St Margarets Episcopal Church	Boiling Springs	Parish	67%	Pledge	\$ 19,079	42%	80%	\$ 10,973	42%
			Audit						60%
			Parochial						100%
Grace Episcopal Church	Camden	Parish	76%	Pledge	\$ 57,261	87%	125%	\$ 7,508	87%
			Audit						40%
			Parochial						100%
All Saints Episcopal Church	Cayce	Parish	90%	Pledge	\$ 18,337	71%	102%	\$ 5,237	71%
			Audit						100%
			Parochial						100%
St Francis of Assisi	Chapin	Parish	84%	Pledge	\$ 49,755	71%	100%	\$ 14,277	71%
			Audit						100%
			Parochial						80%
St Marks Episcopal Church	Chester	Mission	31%	Pledge	\$ 5,119	33%	#NAME?	\$ 3,454	33%
			Audit						0%
			Parochial						60%
Holy Trinity Episcopal Parish	Clemson	Parish	100%	Pledge	\$ 85,420	101%	100%	\$ (482)	101%
			Audit						100%
			Parochial						100%
All Saints Episcopal Church	Clinton	Parish	80%	Pledge	\$ 23,162	100%	97%	\$ 0	100%
			Audit						40%
			Parochial						100%
Church of the Cross	Columbia	Mission	93%	Pledge	\$ 8,396	98%	100%	\$ 165	98%
			Audit						100%
			Parochial						80%
Church of the Good Shepherd	Columbia	Parish	93%	Pledge	\$ 69,180	79%	100%	\$ 14,738	79%
			Audit						100%
			Parochial						100%

EDUSC Congregational Health Report

Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2018-2022

St Davids Episcopal Church	Columbia	Parish	73%	Pledge	\$ 57,596	100%	100%	\$ (0)	100%
				Audit					20%
				Parochial					100%
St Johns Episcopal Church	Columbia	Parish	100%	Pledge	\$ 150,345	100%	100%	\$ 0	100%
				Audit					100%
				Parochial					100%
St Lukes Episcopal Church	Columbia	Parish	87%	Pledge	\$ 34,115	81%	102%	\$ 6,422	81%
				Audit					80%
				Parochial					100%
St Martins in the Fields	Columbia	Parish	74%	Pledge	\$ 151,571	101%	100%	\$ (2,164)	101%
				Audit					20%
				Parochial					100%
St Marys Episcopal Church	Columbia	Parish	78%	Pledge	\$ 68,704	73%	100%	\$ 18,372	73%
				Audit					60%
				Parochial					100%
St Michael and All Angels	Columbia	Mission	78%	Pledge	\$ 53,267	34%	#NAME?	\$ 34,990	34%
				Audit					100%
				Parochial					100%
St Timothys Episcopal Church	Columbia	Parish	91%	Pledge	\$ 22,372	74%	100%	\$ 5,719	74%
				Audit					100%
				Parochial					100%
Trinity Cathedral Church	Columbia	Parish	68%	Pledge	\$ 471,398	84%	101%	\$ 76,835	84%
				Audit					20%
				Parochial					100%
St Michaels Episcopal Church	Easley	Parish	69%	Pledge	\$ 34,503	67%	100%	\$ 11,373	67%
				Audit					40%
				Parochial					100%
St Thomas Church	Eastover	Mission	27%	Pledge	\$ 3,680	62%	#NAME?	\$ 1,398	62%
				Audit					0%
				Parochial					20%
St Pauls Episcopal Church	Fort Mill	Parish	85%	Pledge	\$ 34,075	56%	100%	\$ 14,902	56%
				Audit					100%
				Parochial					100%
Episcopal Church of the Incarnatio	Gaffney	Parish	62%	Pledge	\$ 22,131	25%	100%	\$ 16,650	25%
				Audit					60%
				Parochial					100%
Calvary Episcopal Church	Glenn Springs	Mission	58%	Pledge	\$ 7,345	75%	100%	\$ 1,810	75%
				Audit					0%
				Parochial					100%
St Pauls Episcopal Church	Graniteville	Parish	50%	Pledge	\$ 8,340	29%	100%	\$ 5,926	29%
				Audit					20%
				Parochial					100%
St Peters Episcopal Church	Great Falls	Mission	93%	Pledge	\$ 2,982	100%	100%	\$ (0)	100%
				Audit					80%
				Parochial					100%
Christ Episcopal Church	Greenville	Parish	63%	Pledge	\$ 457,936	68%	100%	\$ 145,327	68%
				Audit					20%
				Parochial					100%
Church of the Redeemer	Greenville	Parish	86%	Pledge	\$ 43,439	97%	98%	\$ 1,307	97%
				Audit					60%
				Parochial					100%

EDUSC Congregational Health Report

Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2018-2022

St Andrews Episcopal Church	Greenville	Parish	97%	Pledge	\$ 34,559	92%	100%	\$ 2,755	92%
				Audit					100%
				Parochial					100%
St Francis Episcopal Church	Greenville	Parish	34%	Pledge	\$ 5,162	3%	#NAME?	\$ 4,997	3%
				Audit					0%
				Parochial					100%
St James Episcopal Church	Greenville	Parish	71%	Pledge	\$ 97,140	93%	100%	\$ 6,800	93%
				Audit					40%
				Parochial					80%
St Peters Episcopal Church	Greenville	Parish	100%	Pledge	\$ 93,762	100%	100%	\$ (0)	100%
				Audit					100%
				Parochial					100%
St Philips Church	Greenville	Mission	88%	Pledge	\$ 8,409	103%	100%	\$ (277)	103%
				Audit					60%
				Parochial					100%
Church of the Resurrection	Greenwood	Parish	100%	Pledge	\$ 62,376	100%	100%	\$ (0)	100%
				Audit					100%
				Parochial					100%
Church of the Good Shepherd	Greer	Parish	89%	Pledge	\$ 21,644	87%	100%	\$ 2,758	87%
				Audit					80%
				Parochial					100%
St Johns Episcopal Church	Hopkins	Parish	100%	Pledge	\$ 20,751	100%	100%	\$ (0)	100%
				Audit					100%
				Parochial					100%
Epis Ch of St Simon & St Jude	Irmo	Parish	81%	Pledge	\$ 38,788	83%	108%	\$ 6,595	83%
				Audit					60%
				Parochial					100%
St Barnabas Episcopal Church	Jenkinsville	Mission	101%	Pledge	\$ 6,386	104%	100%	\$ (231)	104%
				Audit					100%
				Parochial					100%
Christ Episcopal Church	Lancaster	Parish	74%	Pledge	\$ 19,642	22%	161%	\$ 15,381	22%
				Audit					100%
				Parochial					100%
Church of the Epiphany	Laurens	Parish	39%	Pledge	\$ 12,348	37%	#NAME?	\$ 7,794	37%
				Audit					0%
				Parochial					80%
St Albans Episcopal Church	Lexington	Parish	99%	Pledge	\$ 37,253	98%	93%	\$ 721	98%
				Audit					100%
				Parochial					100%
St Lukes Episcopal Church	Newberry	Mission	48%	Pledge	\$ 11,951	23%	#NAME?	\$ 9,173	23%
				Audit					40%
				Parochial					80%
St Bartholomews Episcopal Church	North Augusta	Mission	58%	Pledge	\$ 53,053	13%	84%	\$ 46,162	13%
				Audit					60%
				Parochial					100%
St Stephens Episcopal Church	Ridgeway	Mission	80%	Pledge	\$ 13,145	100%	100%	\$ (0)	100%
				Audit					100%
				Parochial					40%
Episcopal Church of Our Saviour	Rock Hill	Parish	89%	Pledge	\$ 65,040	88%	100%	\$ 8,055	88%
				Audit					80%
				Parochial					100%

EDUSC Congregational Health Report
Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2018-2022

Church of the Ascension	Seneca	Parish	43%	Pledge	\$ 19,115	9%	#NAME?	\$ 17,304	9%
				Audit					20%
				Parochial					100%
Holy Cross Episcopal Church	Simpsonville	Parish	63%	Pledge	\$ 79,502	30%	72%	\$ 55,680	30%
				Audit					60%
				Parochial					100%
Episcopal Church of the Advent	Spartanburg	Parish	92%	Pledge	\$ 302,564	97%	96%	\$ 10,028	97%
				Audit					80%
				Parochial					100%
Episcopal Church of the Epiphany	Spartanburg	Mission	32%	Pledge	\$ 5,332	15%	#NAME?	\$ 4,509	15%
				Audit					0%
				Parochial					80%
St Christophers Church Episcopal	Spartanburg	Mission	68%	Pledge	\$ 34,946	25%	100%	\$ 26,149	25%
				Audit					80%
				Parochial					100%
St Matthews Episcopal Church	Spartanburg	Parish	73%	Pledge	\$ 64,447	80%	#NAME?	\$ 12,889	80%
				Audit					40%
				Parochial					100%
Episcopal Church of the Ridge	Trenton	Mission	87%	Pledge	\$ 22,839	101%	100%	\$ (119)	101%
				Audit					60%
				Parochial					100%
Church of the Nativity	Union	Mission	46%	Pledge	\$ 7,873	57%	100%	\$ 3,365	57%
				Audit					0%
				Parochial					80%
St Johns Episcopal Church	Winnsboro	Parish	74%	Pledge	\$ 7,959	103%	100%	\$ (250)	103%
				Audit					20%
				Parochial					100%
Church of the Good Shepherd	York	Parish	100%	Pledge	\$ 29,191	100%	98%	\$ 0	100%
				Audit					100%
				Parochial					100%

Pledge Acceptance Total	\$ 3,359,636	81%	\$ 652,324	Unaccepted Pledge Total
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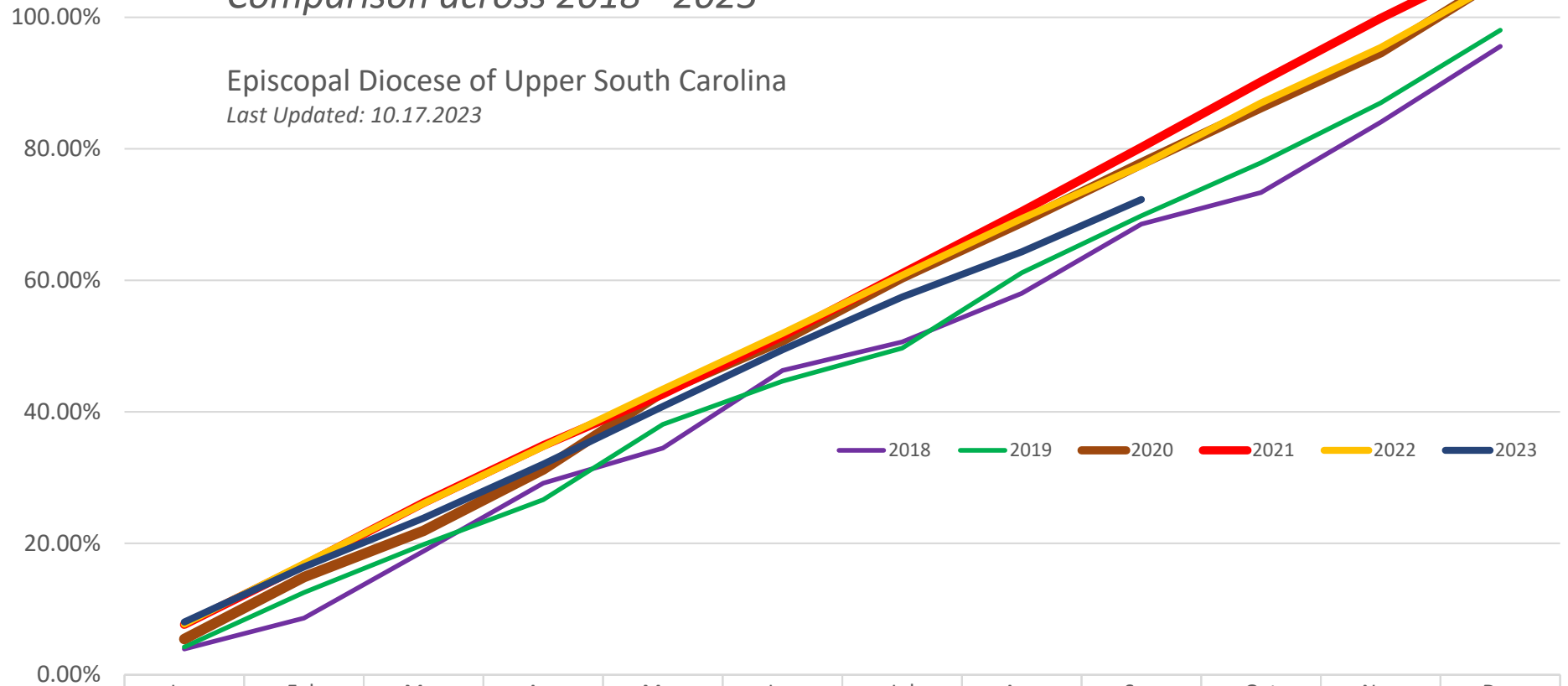
HISTORICAL PLEDGE ANALYSIS

Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2018 - 2023

Episcopal Diocese of Upper South Carolina

Last Updated: 10.17.2023

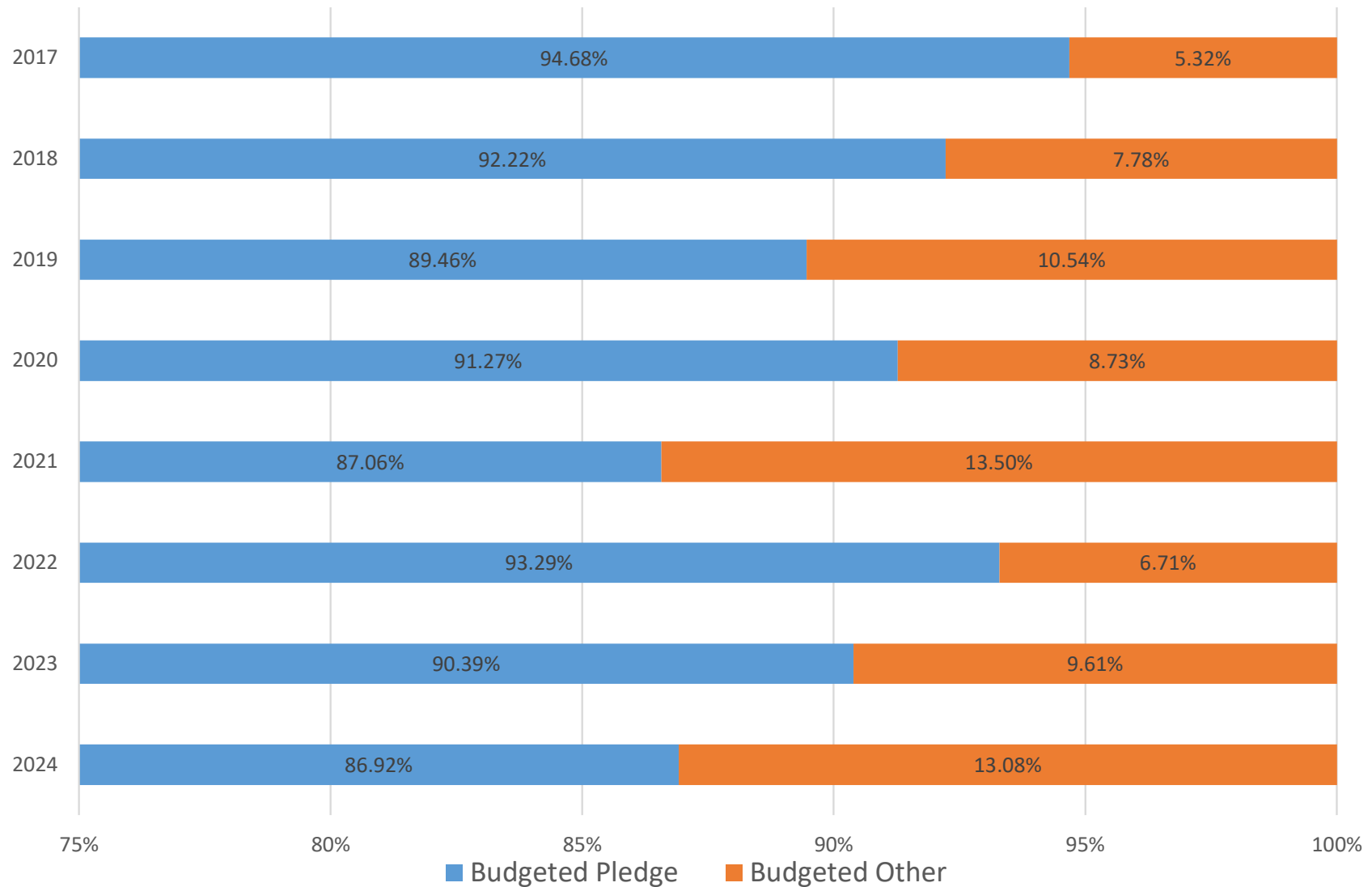


	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2018	3.93%	8.63%	18.81%	29.15%	34.48%	46.29%	50.63%	58.02%	68.55%	73.35%	84.04%	95.58%
2019	4.24%	12.52%	19.83%	26.63%	38.09%	44.66%	49.69%	61.15%	69.81%	77.88%	86.98%	98.04%
2020	5.44%	14.87%	21.91%	31.24%	43.05%	50.87%	60.47%	68.89%	77.77%	86.35%	94.71%	105.98%
2021	7.65%	16.69%	26.17%	34.87%	42.68%	51.53%	61.04%	70.46%	80.23%	90.21%	99.86%	108.82%
2022	7.70%	16.91%	26.06%	34.72%	43.44%	51.94%	60.77%	69.39%	77.45%	86.99%	95.40%	105.56%
2023	8.03%	16.41%	23.84%	32.04%	40.82%	49.44%	57.46%	64.33%	72.29%			

Pledge Income to Total Resources Budgeted and Expended

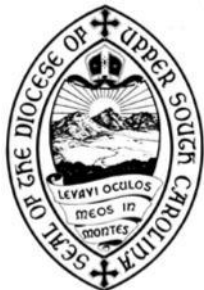
	Budgeted Pledge	Budgeted Other	Total Budgeted	Actual Pledge	Actual Other	Total Actual
2024	86.92%	13.08%	\$ 3,305,300			
2023	90.39%	9.61%	\$ 3,097,600			
2022	93.29%	6.71%	\$ 2,845,890	97.64%	2.36%	\$ 2,876,864
2021	87.06%	13.50%	\$ 2,905,479	99.77%	0.23%	\$ 2,762,728
2020	91.27%	8.73%	\$ 2,870,508	99.64%	0.36%	\$ 2,781,559
2019	89.46%	10.54%	\$ 3,052,294	96.71%	4.66%	\$ 2,808,137
2018	92.22%	7.78%	\$ 2,954,835	99.32%	0.68%	\$ 2,622,326
2017	94.68%	5.32%	\$ 2,799,130	99.65%	0.35%	\$ 2,630,819
2016	93.42%	6.58%	\$ 2,821,639	99.25%	0.75%	\$ 2,633,050
2015	99.29%	0.71%	\$ 2,629,243	94.24%	5.76%	\$ 2,802,318

Pledge Income to Total Income 2018 - 2024





PROPOSED RESOLUTIONS



PROPOSED RESOLUTION

**The 101st Convention of the Diocese of Upper South Carolina
CHRIST CHURCH PARISH
GREENVILLE, SOUTH CAROLINA
NOVEMBER 10-11, 2023**

Please return completed forms on or before September 10, 2023

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as “special” resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: May 8, 2023

Offered by: Standing Committee of the Episcopal Diocese of Upper South Carolina

Subject: Serving of Alcoholic Beverages in the Episcopal Diocese of Upper South Carolina

PROPOSED RESOLUTIONS:

Please see attached Proposed Resolutions.



**THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA
STANDING COMMITTEE**

**STANDING RESOLUTION RELATING TO THE
SERVING OF ALCOHOLIC BEVERAGES IN THE
EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA**

WHEREAS, in 1985, the Sixty-third Annual Convention of The Episcopal Diocese of Upper South Carolina adopted the following Standing Resolution relating to the serving of alcoholic beverages (the “1985 Resolution”):

RESOLVED, that the Sixty-third Annual Convention of the Diocese of Upper South Carolina discourage the serving of alcoholic beverages at church-sponsored social functions on church property.

and,

WHEREAS, in 2015, the 78th General Convention of The Episcopal Church adopted Resolution A158, establishing a policy relating to the serving of alcoholic beverages (the “TEC Policy”), and encouraged dioceses, congregations, seminaries, schools, young adult ministries, and affiliated institutions to update their policies on the use of alcohol and other substances with the potential for misuse, taking into consideration 14 enumerated factors; and

WHEREAS, the Standing Committee of The Episcopal Diocese of Upper South Carolina, pursuant to its interim legislative authority as set forth in Title III, Canon 2, Section 3 of the Canons of The Episcopal Diocese of Upper South Carolina, has determined that it is appropriate to repeal the 1985 Resolution, and, as encouraged by the 78th General Convention of The Episcopal Church, to adopt in its stead a Standing Resolution that substantially takes into consideration the 14 factors outlined in the TEC Policy, to be effective immediately and continue in effect until ratification, amendment or repeal of such Resolution at the 101st Convention of the Diocese of Upper South Carolina.

NOW, THEREFORE, BE IT RESOLVED, that the Standing Resolution adopted in 1985 by the Sixty-third Annual Convention of the Episcopal Diocese of Upper South Carolina relating to the serving of alcoholic beverages (the “1985 Resolution”) be, and it hereby is, repealed; and, further,

RESOLVED, that the following Standing Resolution (the “2022 Resolution”), which substantially takes into consideration the factors outlined in the policy relating to serving of alcoholic beverages adopted in 2015 by the 78th General Convention of The Episcopal Church, be, and it hereby is, adopted:

STANDING RESOLUTION RELATING TO THE SERVING OF ALCOHOLIC BEVERAGES

1. The Church must provide a safe and welcoming environment for all people, including people in recovery.
2. All applicable federal, state and local laws should be obeyed, including those governing the serving of alcoholic beverages to minors.
3. Some congregations, schools, young adult ministries, and affiliated institutions of the Episcopal Diocese of Upper South Carolina may decide not to serve alcohol at events or gatherings. Others may decide to permit a limited use of alcoholic beverages at church-sponsored events. Both can be appropriate if approached mindfully.
4. When alcohol is served, it must be monitored and those showing signs of intoxication must not be served. Whenever alcohol is served, the rector, vicar, priest-in-charge, or person in charge of another organization must appoint an adult to oversee its serving. That adult must not drink alcoholic beverages during the time of his or her execution of his or her responsibilities. If hard liquor is served, a server who has successfully completed a training program recognized by the South Carolina Department of Revenue is required.
5. Serving alcoholic beverages at congregational events where minors are present is strongly discouraged. If minors are present, alcohol must be served at a separate station that is monitored at all times to prevent underage drinking.
6. Alcoholic and non-alcoholic beverages must be clearly labeled as such. Food prepared with alcohol does not need to be labeled provided the alcohol is completely evaporated by the cooking process; however, it is recommended that even in this case the use of alcohol in cooking be noted on a label.
7. Whenever alcohol is served, equally appealing non-alcoholic alternatives must always be offered with equal prominence and accessibility.
8. Ministries inside or outside of congregations will make certain that alcohol consumption is not the focus of the ministry and that drinking alcohol is not an exclusively normative activity.
9. Food must be served when alcohol is present.
10. The groups or organizations sponsoring the activity or event at which alcoholic beverages are served must have permission from the clergy, the vestry, or other person in charge. Such groups or organizations must also assume responsibility for those persons who might become intoxicated and must provide alternative transportation for anyone whose capacity to drive may be impaired. Consulting with liability insurance carriers is advised.
11. Recognizing the effects of alcohol as a mood-altering drug, alcoholic beverages shall not be served when the business of the Church is being conducted.
12. Clergy shall consecrate an appropriate amount of wine when celebrating the Eucharist and perform ablutions in a way that does not foster or model misuse.

and, further,

RESOLVED, that congregations, schools, young adult ministries, and affiliated institutions of the Episcopal Diocese of Upper South Carolina are encouraged to update their policies on the use of alcohol and other substances with the potential for misuse consistent with the 2022 Resolution; and, further,

RESOLVED, that the Standing Committee submit repeal of the 1985 Resolution to the 101st Annual Convention of the Episcopal Diocese of Upper South Carolina (the "101st Convention") for ratification, amendment or repeal; and, further,

RESOLVED, that the Standing Committee submit the 2022 Resolution to the 101st Convention for ratification, amendment or repeal; and, further,

RESOLVED, that repeal of the 1985 Resolution and adoption of the 2022 Resolution be, and they hereby are, effective immediately and shall continue in effect until ratification, amendment or repeal at the 101st Convention; and, further,

RESOLVED, that the President of the Standing Committee serving at the time for proposal of Standing Resolutions at the 101st Convention be, and hereby is, authorized, empowered and directed on behalf of the Standing Committee to take all such actions as are necessary or appropriate to submit repeal of the 1985 Resolution and adoption of the 2022 Resolution to the 101st Convention for ratification, amendment or repeal.

Resolutions adopted by the Standing Committee of the Episcopal Diocese of Upper South Carolina as of December 10, 2022.



2024 PROPOSED STATEMENT OF MISSION

	<i>Approved 2024 SOM</i> Approved for Convention by via Standing Committee on 09.9.2023	Notes	2023 SOM Approved by Convention	2024 SOM Adjusted Allocations	2023 vs. 2024 SOM
	DIOCESAN RESOURCES				
1	Episcopal Pledge Assessments		\$3,360,000	\$3,504,000	\$144,000
2	Less: Allowance for Unaccepted Pledge Assessments		(\$560,000)	(\$631,000)	(\$71,000)
3	Episcopal Pledge Income		\$2,800,000	\$2,873,000	\$73,000
4	Support for Theological Ed. (Endowment)		\$5,500	\$24,000	\$18,500
5	Continuing Ed. for Clergy (Endowment)		\$930	\$4,000	\$3,070
6	Transfer from Diocesan Endowment Portfolio		\$155,269.50	\$264,500.00	\$109,231
7	Transfer of 30% of 2022 projected surplus		\$88,000	\$93,000	\$5,000
8	Transfer from Canterbury Funds for Young Adult Ministry		\$47,900	\$46,800	(\$1,100)
9	Total Resources		\$3,097,600	\$3,305,300.0	\$207,701
	DIOCESAN EXPENSES				
21	Commission on Ministry		\$57,050	\$59,050	\$2,000
25	Commission on Christian Formation		\$109,104	\$112,180	\$3,076
39	Commission for Congregations		\$176,200	\$142,500	(\$33,700)
51	Commission on Convocations		\$0	\$0	\$0
84	Commission on the Diocese		\$2,334,779	\$2,558,886	\$224,107
89	Comm. on The Episcopal Church & The Anglican Communion		\$327,566	\$320,901	(\$6,665)
102	Commission on Mission & International Concerns		\$92,900	\$111,783	\$18,883
103	Total Expenses		\$3,097,599	\$3,305,300	\$207,701
104	Net (Deficit) / Surplus		\$0	\$0	(\$0)

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2024 SOM

Last Updated: 10.30.2023

	<i>Approved 2024 SOM</i> Approved for Convention by via the Standing Committee/Reviewed by DEC	Notes	2023 SOM Approved by Convention	2023 SOM Approved by Convention adjusted	2024 SOM Adjusted Allocations	2023 original vs. 2024 SOM
	DIOCESAN RESOURCES					
3	Episcopal Pledge Income		\$2,800,000	\$2,800,000	\$2,873,000	\$73,000
4	Support for Theological Ed. (Endowment)		\$5,500	\$5,500	\$24,000	\$18,500
5	Continuing Ed. for Clergy (Endowment)		\$930	\$930	\$4,000	\$3,070
6	Income from Diocesan Endowment Portfolio		\$155,269.00	\$155,269.00	\$264,500	\$109,231.00
7	30% Surplus		\$88,000	\$88,000	\$93,000	\$5,000
8	Transfer from Canterbury Funds for Young Adult Ministry	A	\$47,900	\$47,900	\$46,800	(\$1,100)
9	Total Resources		\$3,097,599	\$3,097,599	\$3,305,300	\$207,701
Notes:						
Investment Funds						

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2024 SOM

Last Updated: 10.30.2023

	<i>Approved 2024 SOM</i> Approved for Convention by via the Standing Committee/Reviewed by DEC	Notes	2023 SOM Approved by Convention	2023 SOM Approved by Convention <i>adjusted</i>	2024 SOM Adjusted Allocations	2023 original vs. 2024 SOM
	DIOCESAN EXPENSES					
	<u>Commission on Ministry</u>					
10	COM: Leadership Development		\$500	\$500	\$500	\$0
	<i>Clergy Continuing Education and Development</i>					
11	Clergy Continuing Education and Development (Priest and Deacons)		\$18,000	\$18,000	\$18,000	\$0
12	Ministry of Clergy Spouses		\$3,800	\$3,800	\$3,800	\$0
13	Ministry to Retired Clergy/Spouses		\$2,500	\$2,500	\$2,500	\$0
	<i>Discernment & Theological Ed.</i>					
14	Vocational and Ministry Discernment Program		\$2,000	\$2,000	\$2,000	\$0
15	Diaconate Formation Program		\$1,000	\$1,000	\$2,000	\$1,000
16	Theological Education Assistance		\$8,000	\$8,000	\$8,000	\$0
17	Seminarian Retreat		\$6,000	\$6,000	\$7,000	\$1,000
18	Support of Theological Education		\$5,000	\$5,000	\$5,000	\$0
19	Discernment Retreat		\$10,000	\$10,000	\$10,000	\$0
20	Licensed Lay Ministry		\$250	\$250	\$250	\$0
21	Commission on Ministry		\$57,050	\$57,050	\$59,050	\$2,000
	<u>Commission on Christian Formation</u>					
22	Diocesan Formation Retreats		\$55,324	\$55,324	\$62,000	\$6,676
23	Lay Leadership Development		\$49,800	\$49,800	\$45,380	(\$4,420)
24	Ministry Education and Training		\$3,980	\$3,980	\$4,800	\$820
25	Commission on Christian Formation		\$109,104	\$109,104	\$112,180	\$3,076

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2024 SOM

Last Updated: 10.30.2023

	<i>Approved 2024 SOM</i> Approved for Convention by via the Standing Committee/Reviewed by DEC	Notes	2023 SOM Approved by Convention	2023 SOM Approved by Convention <i>adjusted</i>	2024 SOM Adjusted Allocations	2023 original vs. 2024 SOM
	Commission for Congregations					
	Hispanic Ministries					
26	Holy Cross, Simpsonville - Hispanic Ministries		\$21,700	\$21,700	\$15,000	(\$6,700)
27	St. Francis, Greenville - Hispanic Ministries		\$20,000	\$20,000	\$1,600	(\$18,400)
	African American Ministries					
28	St. Thomas, Eastover		\$4,000.00	\$4,000.00	\$4,000	\$0
	New Ways of Being Church					
29	Church of the Cross, Columbia		\$12,000	\$12,000	\$15,000	\$3,000
30	Episcopal Service Corps		\$0	\$0		\$0
	Continuing Support					
31	Ascension, Seneca		\$20,000	\$20,000	\$20,000	\$0
32	St. Christopher's, Spartanburg		\$10,000	\$10,000	\$11,500	\$1,500
	St. Bartholomew's, North Augusta (Removed after convention)		\$18,000	\$0		
33	Epiphany, Spartanburg		\$5,000	\$5,000	\$18,000	\$13,000
	St. Francis, Chapin (Removed after convention)		\$25,000	\$0	\$0	
34	St. Mark's, Chester		\$30,000	\$30,000	\$25,700	(\$4,300)
35	St. Luke's Newberry (New 2024)		\$0	\$0	\$20,000	\$20,000
	Congregational & Stewardship Development					
36	Congregational Workshops		\$4,000	\$4,000	\$5,000	\$1,000
37	Congregational Vitality and Sustainability		\$5,000	\$5,000	\$5,000	\$0
38	Stewardship Workshops (TENS membership)		\$1,500	\$1,500	\$1,700	\$200
39	Commission for Congregations		\$176,200.00	\$133,200.00	\$142,500	\$9,300
	Commission on Convocations					
40			\$0	\$0		\$0

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2024 SOM

Last Updated: 10.30.2023

	<i>Approved 2024 SOM</i> Approved for Convention by via the Standing Committee/Reviewed by DEC	Notes	2023 SOM Approved by Convention	2023 SOM Approved by Convention <i>adjusted</i>	2024 SOM Adjusted Allocations	2023 original vs. 2024 SOM
	<u>Commission on the Diocese</u>					
	<u>Clergy Insurance</u>					
41	Group Long-Term Disability		\$25,000	\$25,000	\$25,000	\$0
42	Group Insurance - Active Clergy		\$732,000	\$732,000	\$821,000	\$89,000
43	Group Insurance - Retired		\$25,000	\$25,000	\$25,000	\$0
	Subtotal - Clergy Insurance		\$782,000	\$782,000	\$871,000	\$89,000
	<u>Office of the Bishop</u>					
44	Bishop Stipend		\$185,000	\$185,000	\$190,550	\$5,550
45	Bishop Pension		\$33,300	\$33,300	\$34,299	\$999
46	Bishop Insurance		\$43,679	\$43,679	\$47,179	\$3,500
47	Bishop's Staff Stipends & Benefits		\$825,000	\$825,000	\$936,058	\$111,058
48	Staff FICA		\$26,000	\$26,000	\$28,000	\$2,000
49	Short-term disability		\$2,400	\$2,400	\$2,400	\$0
50	Episcopal Visitations (Removed in 2024)		\$1,500	\$1,500	\$0	(\$1,500)
51	Diocesan House Admin. (utilities, phones, computers, postage, supplies, etc.)		\$133,000	\$133,000	\$122,500	(\$10,500)
52	Bishop's Accountable Plan for business expenses, travel, hospitality		\$34,000	\$34,000	\$35,000	\$1,000
53	Canon Staff Accountable Plan for business expenses, travel, hospitality		\$30,000	\$30,000	\$30,000	\$0
54	Non-Canon Staff Accountable Plan for business expenses, travel, hospitality		\$20,000	\$20,000	\$20,000	\$0
55	Property manager shared with Trinity		\$12,000	\$12,000	\$12,000	\$0
56	DH Capital Maintenance Fund		\$10,000	\$10,000	\$10,000	\$0
57	DH Capital Maintenance Future		\$25,000	\$25,000	\$25,000	\$0
58	Communications (e-DUSC, Web, on-line registrations)		\$25,000	\$25,000	\$25,000	\$0
59	Bishop Search Expenditures		\$5,000	\$5,000	\$5,000	\$0
	<u>Support for Holy Orders Process</u>					
60	Seminarian Insurance		\$12,000	\$12,000	\$12,000	\$0
61	Curacy Program		\$30,000	\$30,000	\$40,000	\$10,000
62	DOK Daughters of the King (New 2024)		\$0	\$0	\$1,000	\$1,000
	Subtotal - Office of the Bishop		\$1,452,879	\$1,452,879	\$1,575,986	\$122,107

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2024 SOM

Last Updated: 10.30.2023

	<i>Approved 2024 SOM</i> Approved for Convention by via the Standing Committee/Reviewed by DEC	Notes	2023 SOM Approved by Convention	2023 SOM Approved by Convention <i>adjusted</i>	2024 SOM Adjusted Allocations	2023 original vs. 2024 SOM
	<i>Bishop's Events:</i>					
63	Clergy Business Day		\$1,000	\$1,000	\$1,000	\$0
64	Ordinations - Diaconate		\$1,000	\$1,000	\$1,000	\$0
65	Ordinations - Priesthood		\$1,000	\$1,000	\$1,000	\$0
66	Ordinations - Transitional Diaconate		\$1,000	\$1,000	\$1,000	\$0
67	Renewal of Vows		\$1,000	\$1,000	\$1,000	\$0
68	Celebrations of New Ministries		\$1,000	\$1,000	\$1,000	\$0
	Subtotal - Bishop's Events		\$6,000	\$6,000	\$6,000	\$0
	<i>Diocesan Institutions</i>					
69	All Saints', Clinton for facilities use		\$4,000	\$4,000	\$4,000	\$0
70	Still Hopes		\$1,000	\$1,000	\$1,000	\$0
71	Finlay House		\$500	\$500	\$500	\$0
72	Gravatt		\$1,000	\$1,000	\$1,000	\$0
73	Univ. of the South School of Theology (Sewanee)		\$4,000	\$4,000	\$4,000	\$0
74	Voorhees		\$1,500	\$1,500	\$1,500	\$0
75	Heathwood Hall Episcopal School		\$1,000	\$1,000	\$1,000	\$0
	Subtotal - Diocesan Institutions		\$13,000	\$13,000	\$13,000	\$0
	<i>Diocesan Convention</i>					
76	Diocesan Convention - Leadership Day & Business Day		\$20,000	\$20,000	\$25,000	\$5,000
77	Convention Secretary		\$2,400	\$2,400	\$2,400	\$0
	Subtotal - Diocesan Convention		\$22,400	\$22,400	\$27,400	\$5,000
	<i>Diocesan Executive Council</i>					
78	Diocesan Executive Council		\$1,500	\$1,500	\$2,000	\$500
79	D.E.C. Orientation & Planning		\$4,000	\$4,000	\$3,500	(\$500)
80	Audit & Accounting Services		\$25,000	\$25,000	\$25,000	\$0
81	Insurance - Property, Liability, Bond		\$20,000	\$20,000	\$27,000	\$7,000
82	Real Property Expenses		\$5,000	\$5,000	\$5,000	\$0
83	Diocesan Chancellors		\$3,000	\$3,000	\$3,000	\$0
	Subtotal - Diocesan Executive Council		\$58,500	\$58,500	\$65,500	\$7,000
84	Commission on the Diocese		\$2,334,779	\$2,334,779	\$2,558,886	\$223,107

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2024 SOM

Last Updated: 10.30.2023

	<i>Approved 2024 SOM</i> Approved for Convention by via the Standing Committee/Reviewed by DEC	Notes	2023 SOM Approved by Convention	2023 SOM Approved by Convention adjusted	2024 SOM Adjusted Allocations	2023 original vs. 2024 SOM
Notes:						
	<u>Comm. on The Episcopal Church & The Anglican Communion</u>					
85	Province IV Pledge		\$2,000	\$2,490	\$2,500	\$500
86	Diocesan Pledge to The Episcopal Church		\$305,566	\$305,566	\$298,401	(\$7,165)
87	Deputies to General & Synod Convention		\$15,000	\$15,000	\$15,000	\$0
88	Lambeth Conference		\$5,000	\$5,000	\$5,000	\$0
89	Comm. on The Episcopal Church & The Anglican Communion		\$327,566	\$328,056	\$320,901	(\$6,665)
	<u>Commission on Mission & International Concerns</u>					
90	Episcopal Relief & Development		\$500	\$500	\$250	(\$250)
91	Sustainable Development (Millennium) Goals	B	\$19,900	\$19,900	\$19,900	\$0
92	World Mission Committee - Cange		\$15,000	\$35,000	\$35,000	\$20,000
93	Ecuador Missionary Support		\$15,000	\$15,000	\$15,000	\$0
94	SC Bishops' Public Education Initiative		\$15,000	\$15,000	\$15,000	\$0
95	Camp AIR (Adventures in Reading)		\$1,000	\$1,000	\$1,000	\$0
96	Matthew 25 Outreach Grants		\$15,000	\$15,000	\$15,000	\$0
97	Racial Reconciliation		\$2,000	\$2,000	\$1,383	(\$617)
98	HIV/AIDS Committee		\$2,000	\$2,000	\$2,000	\$0
99	Voorhees Scholars Program		\$5,000	\$5,000	\$5,000	\$0
100	Environmental Stewardship and Justice		\$2,000	\$2,000	\$2,000	\$0
101	New - SC Christian Action Council		\$500	\$500	\$250	(\$250)
102	Commission on Mission & International Concerns		\$92,900	\$112,900	\$111,783	\$18,883
Notes:						
	B Scholarships for students in Ecuador and Haiti.					
103	Total Expenses		\$3,097,599	\$3,075,089	\$3,305,300	\$249,701
104	Net (over)/under		\$0	\$22,510	\$0	



MINUTES FROM THE 100TH ANNUAL CONVENTION



The
**EPISCOPAL
DIOCESE OF**
UPPER SOUTH CAROLINA

**Minutes of the
100th Diocesan Convention – Business Session
Trinity Cathedral, Columbia**

November 11 - 12, 2022

Convention Call to Order: The 100th Convention of The Episcopal Diocese of Upper South Carolina was called to order at 5 p.m. by **The Rt. Rev. Daniel P. Richards**, using the *“Collect for a Church Convention.”*

Almighty and everliving God, source of all wisdom and understanding, be present with us who take counsel in The Episcopal Diocese of Upper South Carolina for the renewal and mission of your Church. Teach us in all things to seek first your honor and glory. Guide us to perceive what is right, and grant us both the courage to pursue it and the grace to accomplish it; through Jesus Christ our Lord. Amen.

Bishop Richards recognized **The Very Rev. Dane Boston, Dean of Trinity Cathedral**, who welcomed everyone to the Cathedral. The Bishop then provided some instructions for the conduct of the Business of Convention.

Certification of Quorum: The Bishop recognized **Mr. Robert Moderhack from Vistacom Information Systems, Inc.** to lead participants through the process for Certification of Quorum. **The Bishop** then recognized **Dr. Norah Grimbball, Secretary of Convention**, who certified that a quorum was present.

Acceptance of Agenda: **Bishop Richards** recognized **The Rev. Canon Stephen Rhoades, Bishop’s Convention Officer**, who moved acceptance of the agenda. Since the motion came from committee, a second was not required and the motion carried.

The Bishop then recognized **The Rev. Dan Wagner, Chair of the Credentials Committee**, who certified that there were 53 clergy and 143 lay delegates in attendance, who have seat, voice, and vote.

In accordance with TITLE I, CANON 1, SECTION 1. (a) (2), Father Wagner requested that the Convention grant seat, voice and vote to non-canonically resident clergy currently placed in the

Diocese:

The Rev. Paul Abernathy, St. Matthew's Spartanburg
The Rev. Kelly Ayer, Epiphany, Laurens
The Rev. Amy Blizzard, St. Thomas, Eastover
The Rev. Deacon Pam Crossley, St. Bartholomew's, North Augusta
The Rev. Deacon Nelson "Rocky" Dworak, St. David's, Columbia
The Rev. Phil Emanuel, Christ Church, Lancaster
The Rev. Deacon Christine Gregory, Church of the Ridge, Trenton
The Rev. Joel Hafer, Church of the Ascension, Seneca
The Rev. Mark Moline, All Saints', Clinton

On behalf of the committee, he moved for seat, voice, and vote for these clergy. The motion carried.

In accordance with TITLE I, CANON 1, SECTION 3 (a), Father Wagner requested that the Convention grant seat and voice to non-canonically resident clergy who are licensed to serve in Upper South Carolina:

The Rev. Carol Andrew, OSH
The Rev. Lloyd Angus
The Rev. Miriam Elizabeth, OSH
The Rev. Stephen Bolle
The Rev. Walter Bryant
The Rev. Alan French
The Rev. Douglas Graul (Pastor)
The Rev. Dale C. Hathaway
The Rev. Linda Hawkins
The Rev. Christina Jillard
The Rev. Martin Lopez Vega (Pastor)
The Rev. William C. Lutz
The Rev. Donald S. McPhail
The Rev. Gregory C. Moore (Pastor)
The Rev. Margaret A. Muncie
The Rev. James H. Nichols (Pastor)
The Rev. Thomas Nicoll
The Rev. Glenn Palmer
The Rev. David W. Pittman
The Rev. Sara Putnam
The Rev. Douglas M. Renegar
The Rev. Lynn Sanders
The Rev. Ames Swartsfager
The Rev. Arthur W. Turfa (Pastor)

The Rev. Erwin Veale
The Rev. Raymond Jay Waldon
The Rev. Bruce Walker

On behalf of the committee, he moved for seat and voice for these clergy. The motion carried.

On behalf of the committee, Father Wagner moved that the Convention grant seat and voice to the representatives from St. Paul's, Batesburg. The motion carried.

On behalf of the committee, Father Wagner moved that the Convention grant seat and voice to Young Adult Peer Campus Ministers present. The motion carried.

On behalf of the committee, Father Wagner moved that the Convention grant seat and voice for the members of the Diocesan Youth Leadership Committee present. The motion carried.

On behalf of the committee, Father Wagner moved that the Convention grant seat and voice to third-year seminarians present. The motion carried.

Father Wagner stated that the Report of the Committee on Credentials was concluded.

Election of Diocesan Convention Secretary: The Bishop recognized **Ms. Janet Rippy**, Secretary of Diocesan Executive Council, who placed the name of **Dr. Norah Grimball** for approval as Secretary to Convention, as nominated by Bishop Richards and approved by the Standing Committee.

As there were no other nominees, Dr. Grimball was elected by acclamation.

Election of Treasurer: **Ms. Janet Rippy**, then placed the name of **Dr. Bill Sandberg**, as nominated by the Bishop and approved by the Standing Committee, on the floor for approval as Treasurer.

As there were no other nominees, Dr. Sandberg was elected by acclamation.

Convention Manual: Bishop Richards recognized **Dr. Norah Grimball**, Secretary of Convention, who informed those present that the materials for this Convention could be found in the Convention Manual available on the diocesan website and that the Manual includes the proposed amendments to the Constitution and Canons of the Episcopal Church which will have their second reading at the 81st General Convention of the Episcopal Church in 2024.

Report of Nominations Committee and Receipt of Nominations from the Floor: The Bishop

recognized **The Rev. Catherine Tatum, Chair of the Nominations Committee**, to present the nominations for positions to be filled by election. She reported that the following nominations had been received:

ELECTION #1

Diocesan Executive Council (DEC) – Clergy Order

Elect three (3) for a term of three (3) years.

The Rev. Scott Fleischer, Christ Church, Greenville (Foothills Convocation)

The Rev. Dianna Deaderick, St. Martin's-in-the-Fields, Columbia (Midlands Convocation)

The Rev. Beth Hendrix (Midlands Convocation)

The Rev. Raphiell Ashford, St. Luke's, Columbia (Midlands Convocation)

There being no further nominations, Rev. Tatum moved that the nominations be closed. A second came from the floor and the motion carried.

ELECTION #2

Diocesan Executive Council (DEC) – Lay Order

Elect three (3) for a term of three (3) years.

Rev. Tatum reported that the following nominations had been received.

Ms. Chris Lynn, Church of the Advent, Spartanburg (Piedmont Convocation)

Dr. Norma Givens, Christ Church, Greenville (Foothills Convocation)

Ms. Grace Keller, St. Matthew's, Spartanburg (Piedmont Convocation)

Mr. Hampton Saussy, Good Shepherd, Columbia (Midlands Convocation)

There being no further nominations, Rev. Tatum moved that the nominations be closed. A second came from the floor and the motion carried.

ELECTION #3

Ecclesiastical Disciplinary Board – Clergy Order

Elect three (3) for a term of three (3) years.

Rev. Tatum reported that the following nominations had been received.

The Rev. Patricia Sexton, All Saints, Cayce

The Rev. Debbie Apoldo, St. Christopher's, Spartanburg

The Rev. Marie Cope, St. Peter's, Greenville

There being no further nominations, Rev. Tatum moved that the nominations be closed. A

second came from the floor and the motion carried.

ELECTION #4

Ecclesiastical Disciplinary Board – Lay Order

Elect one (1) for a term of three (3) years.

Rev. Tatum reported that no nominations had been received.

Bishop Richards then asked if there were nominations from the floor. **Robert Clawson, Good Shepherd, Columbia**, was nominated and provided the necessary materials to the Secretary of Convention

There being no further nominations, Rev. Tatum moved that the nominations be closed. A second came from the floor and the motion carried.

ELECTION #5

Trustee of the University of the South – Lay Order

One (1) to be elected.

Rev. Tatum reported that the following nominations had been received.

Mr. Jim Knubel
Ms. Kirby Colson

There being no further nominations, Rev. Tatum moved that the nominations be closed. A second came from the floor and the motion carried.

ELECTION #6

Deputy to General Convention – Lay Order

Four (4) to be elected for two (2) years.

Rev. Tatum reported that the following nominations had been received.

Dr. Norah Grimball, Trinity Cathedral, Columbia
Ms. Whitney Evans, St. Timothy's Columbia
Ms. Angela Daniel, St. John's, Columbia (Shandon)
Ms. Melissa Langford, Grace, Anderson
Ms. Rebecca Ann Maitland, St. Michael-and-all-Angels, Columbia

There being no further nominations, Rev. Tatum moved that the nominations be closed. A second came from the floor and the motion carried.

ELECTION #7

**Deputy to General Convention – Clergy Order
Four (4) to be elected for two (2) years.**

Rev. Tatum reported that the following nominations had been received.

The Rev. Jack Hardaway, Grace, Anderson
The Rev. Kellie Wilson, Christ Church, Greenville
The Rev. Marie Cope, St. Peter's, Greenville
The Rev. Dorian Del Priore, Holy Cross, Simpsonville
The Rev. Mitchell Smith, St. Martin's-in-the-Fields, Columbia
The Rev. Gary Eichelberger, St. Andrew's, Greenville
The Rev. Mia McDowell, Trinity Cathedral, Columbia
The Rev. Raphiell Ashford, St. Luke's, Columbia

There being no further nominations, Rev. Tatum moved that the nominations be closed. A second came from the floor and the motion carried.

CONFIRMATION

Board of Directors – Still Hopes

Rev. Tatum reported that the following persons had been nominated by the Board of Directors at Still Hopes:

Mr. Gus Chapman
Mr. John Moorman
Major General Eli Wishart

Bishop Richards noted that the vote on confirming the new members of the Still Hopes Board of Directors would take place the following day.

RATIFICATION

Finlay House – Board of Directors

Rev. Tatum reported that the following persons had been presented by the Finlay House Board of Directors for ratification by the Convention:

The Rev. Margaret Jennings Todd
Ms. Katie Owens
Mr. Chris Kirk

Bishop Richards noted that the vote on confirming the new members of the Still Hopes Board of Directors would take place the following day.

Report of the Committee on Constitution and Canons: The Bishop recognized **Ms. Suzanne Hulst Clawson, President of the Standing Committee and Chair of the Committee on Constitution and Canons**, who presented proposed amendments to the Diocesan Canons with thumbnail sketches of each. Since these amendments were proposed by committee, no second was needed. The proposed amendments are at the end of the Journal

Proposed Amendment #1

Title I, Canon 4, Section 1(d), Episcopal Elections.

See attached.

Proposed Amendment #2

Title I, Canon 3, Section 1(a), Notices.

See attached.

Proposed Amendment #3

Title III, Canon 1, Section 2(b), Other Diocesan Executive Council Members.

See attached.

Proposed Amendment #4

Title III, Canon 2, Section 3, Diocesan Executive Council Responsibilities.

See attached.

Proposed Amendment #5

Title III, Canon 2, Section 3, Interim Legislative Authority of Standing Committee between Conventions.

See attached.

Proposed Amendment #6

Title III, Canon 2, Section 3 and Title VIII, Canon 10, Section 1, Parish/Mission Status.

See attached.

Proposed Amendment #7

Title VIII, Canon 9, Section 3, Duty to Send Delegates to Convention.

See attached.

Ms. Clawson reported that the report of the Committee on Constitution and Canons was complete.

Treasurer's Report: Bishop Richards recognized **Dr. Bill Sandberg** who presented the 2022 Diocesan Treasurer's Report. The Treasurer's Report is at the end of the Journal
See attached.

Adjournment: Following the Treasurer's Report, the Bishop asked for a motion to adjourn

until Saturday, November 12, at 9 am. The motion was made, seconded and carried.

Convention Call to Order: At 9 am on Saturday, November 12, **Bishop Richards** reconvened Diocesan Convention and offered the following prayer:

Almighty and everliving God, source of all wisdom and understanding, be present with us who take counsel in The Episcopal Diocese of Upper South Carolina for the renewal and mission of your Church. Teach us in all things to seek first your honor and glory. Guide us to perceive what is right, and grant us both the courage to pursue it and the grace to accomplish it, through Jesus Christ our Lord. Amen.

Electronic Voting: **Bishop Richards** gave some opening remarks and then recognized Mr. **Robert Moderhack** of Vistacom who re-introduced the electronic voting procedure and conducted a practice vote.

Certification of Quorum: The Bishop recognized **Dr. Norah Grimball**, Secretary to Convention, who certified that a quorum was present.

Report of the Credentials Committee: The Bishop then recognized **The Rev. Dan Wagner**, Chair of the Credentials Committee who reported that there were 51 clergy delegates and 155 lay delegates in attendance who have seat, voice and vote.

Bishop's Convention Address: Bishop Richards recognized **Ms. Suzanne Hulst Clawson**, President of the Standing Committee, who assumed the Chair of Convention while the Bishop delivered his Convention Address.

Report of the Committee on Resolutions: After resuming the Chair, the Bishop recognized **Ms. Angela Daniel, Chair of the Committee on Resolutions**. Ms. Daniel indicated that the Committee recommends approval of the recommended Amendments to the Canons #1 – #7 which were presented yesterday. Since these came from a committee, no second was needed and these were approved by a voice vote.

She then presented Resolution #8 from the Standing Committee, indicating the Committee on Resolutions recommends approval. Since the Resolution was submitted by a committee, no second was needed, and Resolution #8 was approved by a voice vote. See attached.

Next she presented Resolution #9, submitted by Katherine Robinson on behalf of the Diocesan Committee on Environmental Stewardship and Justice, and indicated that the Committee on Resolutions recommends approval. Since the Resolution was submitted by a committee, no second was needed, and Resolution 9 was approved by a voice vote.

INSERT RESOLUTION #9

Ms. Daniel then presented Resolution #10, submitted by the Gravatt Convocation, and indicated that the Committee on Resolutions had no recommendation. After some discussion, a motion to end discussion was made, seconded and passed by a 2/3 voice vote. Since the Resolution was submitted by a committee, no second was needed, and Resolution 10 was approved using electronic voting (132 yes; 111 no).
See attached.

Bishop Richards called for resolutions from the floor and, there being none, this concluded the business of the Committee on Resolutions.

Diocesan Elections: The Bishop called on **The Rev. Raphiell Ashford**, Head Teller, to conduct the elections for those who were nominated the previous day. With the exception of Election #4, which was conducted using voice vote, the voting took place electronically. The following individuals were elected:

ELECTION #1: Diocesan Executive Council (DEC) – Clergy Order

The Rev. Scott Fleischer, Christ Church, Greenville

The Rev. Dianna Deaderick, St. Martin's-in-the-Fields, Columbia

The Rev. Raphiell Ashford, St. Luke's, Columbia

ELECTION #2: Diocesan Executive Council (DEC) – Lay Order

Ms. Chris Lynn, Church of the Advent, Spartanburg

Dr. Norma Givens, Christ Church, Greenville

Ms. Grace Keller, St. Matthew's, Spartanburg

ELECTION #3: Ecclesiastical Disciplinary Board – Clergy Order

The Rev. Patricia Sexton, All Saints, Cayce

The Rev. Debbie Apoldo, St. Christopher's, Spartanburg

The Rev. Marie Cope, St. Peter's, Greenville

ELECTION #4: Ecclesiastical Disciplinary Board - Lay Order

Mr. Robert Clawson, Good Shepherd, Columbia (elected by acclamation)

ELECTION #5: Trustee of the University of the South – Lay Order

Ms. Kirby Colson

ELECTION #6: Deputy to General Convention – Lay Order

Ms. Melissa Langford, Grace, Anderson

Ms. Whitney Evans, St. Timothy's Columbia

Ms. Angela Daniel, St. John's, Columbia (Shandon)

Dr. Norah Grimball, Trinity Cathedral, Columbia

Alternate: Ms. Rebecca Ann Maitland, St. Michael-and-all-Angels, Columbia

ELECTION #7: Deputy to General Convention – Clergy Order

The Rev. Mia McDowell, Trinity Cathedral, Columbia

The Rev. Jack Hardaway, Grace, Anderson

The Rev. Dorian Del Priore, Holy Cross, Simpsonville

The Rev. Kellie Wilson, Christ Church, Greenville

1st Alternate: The Rev. Marie Cope, St. Perer's, Greenville

2nd Alternate: The Rev. Raphiell Ashford, St. Luke's, Columbia

3rd Alternate: The Rev. Gary Eichelberger, St. Andrew's, Greenville

4th Alternate: The Rev. Mitchell Smith, St. Martin's-in-the-Fields, Columbia

Confirmation of Still Hopes Board of Directors: Rev. Ashford then called for a voice vote to confirm the new members of the Still Hopes Board of Directors, who were presented yesterday. A motion to confirm was made, seconded and passed.

Ratification of Finlay House Board of Directors: Rev Ashford called for a voice vote to ratify the new members of the Finlay House Board of Directors, who were presented yesterday. A motion to ratify was made, seconded and passed.

Amendments to the Canons: Rev. Ashford next called for a vote to approve the Amendments to the Canons that were presented yesterday. It was moved to conduct a voice vote on all seven amendments together. The motion was seconded and carried and the Amendments to the Canons were approved by acclamation.

2023 Statement of Mission: Next, Dr. Sandberg presented the **2023 Statement of Mission** and moved that it be adopted. Since the SOM is presented from the Standing Committee, no second is needed, and the 2023 Statement of Mission was approved by acclamation. See attached.

Invitation to the 101st Diocesan Convention: Bishop Richards recognized **The Rev. Harrison McLeod, Rector of Christ Church, Greenville**, who invited the 101st Diocesan Convention to assemble at Christ Church, Greenville, the weekend of November 10-11, 2023. On behalf of the convention, Bishop Richards accepted the invitation with thanks.

Dispatch of Business: Bishop Waldo then recognized **The Rev. Canon Stephen Rhoades**, Bishop's Convention Officer, who reported that all business on the agenda for the 100th Diocesan Convention had been dispatched.

Blessing and Dismissal: Bishop Richards closed with a blessing and adjourned the 100th Convention of the Diocese of Upper South Carolina at 11:35 am.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

Please return completed forms on or before September 11, 2022

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as "special" resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Fax: 803-799-5119

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the "Committee")

Subject: Amendment of Title I, Canon 4, Section 1(d) – Episcopal Elections -- of the Canons of the Episcopal Diocese of Upper South Carolina (the "Canons")

WHEREAS, the Diocese had difficulty in establishing a clergy quorum for the 2021 Special Convention to Elect the Ninth Bishop of the Episcopal Diocese of Upper South Carolina; and

WHEREAS, the current canonical requirement in Title I, Canon 4, Section 1(d) of the Canons to establish a clergy quorum for an episcopal election is two-thirds of all clergy canonically resident in the Diocese and entitled to vote, including retired clergy; and

WHEREAS, in recent years, an increasing number of retired diocesan clergy are in poor health, have mobility issues, or have moved out of the Diocese, which makes their ability to attend diocesan Conventions more difficult; and

WHEREAS, in light of the aging population of clergy canonically resident in the Diocese, the number of retired clergy is likely to increase substantially over the next five to ten years, making it even more difficult to achieve the requisite quorum for future episcopal election conventions; and

WHEREAS, the Committee, therefore recommends amending Title I, Canon 4, Section 1(d) of the Canons relating to clergy quorum for an episcopal election by reducing such quorum from two-thirds to a majority of clergy canonically resident in the Diocese without reducing the number of total clergy who must vote in favor of a nominee for such nominee to be elected.

NOW, THEREFORE, BE IT RESOLVED, that Title I, Canon 4, Section 1(d) of the Canons of the Episcopal Diocese of Upper South Carolina be, and it hereby is, amended to read as follows:

(d) Episcopal Elections. In the election of a Bishop, Bishop Coadjutor or Bishop Suffragan, the vote shall be by secret ballot, and by orders. At least a majority of all Clergy canonically resident in the Diocese and entitled to vote and Lay delegates from at least two-thirds of the Parishes and Missions of the Diocese entitled to representation and to vote shall constitute a quorum. The vote of each Lay delegate and of each Clergy member of Convention entitled to vote shall be counted as one vote. A concurrent majority of the two orders counted separately shall be necessary to elect, but in no case shall the Clergy vote constitute fewer than one-third of the total number of Clergy canonically resident in the Diocese. Nominations of any qualified Clergy may be made at any time during the balloting from the floor by process of writing in such name on a ballot.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

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PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the "Committee")

Subject: Amendment of Title I, Canon 3, Section 1(a) – Notices – of the Canons of the Episcopal Diocese of Upper South Carolina (the "Canons")

WHEREAS, Title I, Canon 3, Section 1(a) of the Canons requires the Secretary of Convention to give notice of Annual and Special Conventions, but it does not currently state the notice periods; and

WHEREAS, these notice periods are set forth in Title II, Canon 4, Section 3 under the duties of the Secretary; and

WHEREAS, for ease of reference, the Committee recommends amending Title I, Canon 3, Section 1(a) of the Canons to also state these notice periods; and

WHEREAS, for consistency, the Committee also recommends that the references to clergy, parish and mission used in Title I, Canon 3, Section 1(a) of the Canons be conformed to the language used in Title II, Canon 4, Section 3 of the Canons.

NOW, THEREFORE IT BE RESOLVED, that Title I, Canon 3, Section 1(a) of the Canons of the Episcopal Diocese of Upper South Carolina be, and it hereby is, amended to read as follows:

SECTION 1. CALLING AND ORGANIZATION OF CONVENTION.

(a) Notices. Notice of the meeting of any Convention shall be given by the Secretary of Convention in a letter transmitted by mail to all Clergy canonically resident in the Diocese and to every Parish vestry and Mission committee in the Diocese in union

with Convention. These letters shall contain a notice of the time and place of Convention and, if it is a Special Convention called as provided in these Canons for a particular purpose, the letters shall specify that purpose. Notice of an Annual Convention shall be given at least seven months prior thereto, and notice of a Special Convention shall be given at least six weeks prior thereto. The letter to Clergy responsible for the administration of a Parish or Mission shall also contain the form of parochial reports and the form of certification for delegates and alternates, and such extracts from the Constitution, Canons and Standing Resolutions of the Diocese as relate to the election of delegates and alternates. The completed form of certification for delegates and alternates shall be filed with the Secretary of Convention not later than six months prior to the Annual Convention date, or thirty calendar days prior to a Special Convention date.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

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PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the "Committee")

Subject: Amendment of Title III, Canon 1, Section 2(b) of the Canons of the Episcopal Diocese of Upper South Carolina

WHEREAS, it is not clear in Title III, Canon 1, Section 2(b) of the Canons that the members of Diocesan Executive Committee who are not elected by Convention serve in an *ex officio* status; and

WHEREAS, to clarify the status of such members, the Committee recommends amending Title III, Canon 1, Section 2(b) of the Canons to include the term *ex officio*.

NOW, THEREFORE, BE IT RESOLVED, that Title III, Canon 1, Section 2(b) of the Canons of the Episcopal Diocese of Upper South Carolina be, and it hereby is, amended to read as follows:

(b) Other Diocesan Executive Council Members. The Bishop, Chancellor, Vice Chancellor, Treasurer, Assistant Treasurer, and the Deans and Lay wardens of the Convocations shall serve as *ex officio* members of the Diocesan Executive Council for the term during which they serve in such offices.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

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PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the “Committee”)

Subject: Amendment of Title III, Canon 2, Section 2 of the Canons of the Episcopal Diocese of Upper South Carolina (the “Canons”) – Responsibilities of the Diocesan Executive Council

WHEREAS, adoption of bylaws is set forth in Title III, Canon 2, Section 2 of the Canons under the responsibilities of the Diocesan Executive Council (4th bullet of Section 2) and in Title III, Canon 2, Section 3 of the Canons under the responsibilities of the Standing Committee (last bullet of Section 3); and

WHEREAS, only the Standing Committee has authority to adopt Bylaws for Diocesan Executive Council and Standing Committee; and

WHEREAS, the Committee, therefore, recommends amending Title III, Canon 2, Section 2 of the Canons to delete the fourth bullet thereof.

NOW, THEREFORE BE IT RESOLVED, that the fourth bullet of Title III, Canon 2, Section 2 of the Canons of the Episcopal Diocese of Upper South Carolina that refers to adoption of bylaws by Diocesan Executive Council be, and it hereby is, deleted.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

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PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the “Committee”)

Subject: Amendment of Title III, Canon 2, Section 3 of the Canons of the Episcopal Diocese of Upper South Carolina (the “Canons”) – Interim Legislative Authority

WHEREAS, the third bullet point of Title III, Canon 2, Section 3 of the Canons provides that one of the responsibilities of the Standing Committee of the Episcopal Diocese of Upper South Carolina (the “Standing Committee”) is as follows:

- To function as an interim legislative authority of Convention, performing such specific functions as are delegated to it by Convention, the Constitution, and these Canons. Such duties shall include administering the budget and financial resources of the Diocese as described in the Statement of Mission described in Title V, Canon 1.

and,

WHEREAS, this provision has historically been interpreted and applied somewhat more broadly than it is written to authorize the Standing Committee to take necessary action to ensure that the business of the Diocese can continue to be conducted efficiently when unexpected matters requiring approval of Convention arise between Conventions; and,

WHEREAS, the Committee, therefore, recommends amending this provision to clarify and memorialize the broader interpretation, and to ensure checks and balances are in place to prevent improper use of such authority.

NOW, THEREFORE BE IT RESOLVED, that the third bullet point of Title III, Canon 2, Section 3 of the Canons of the Episcopal Diocese of Upper South Carolina be, and it hereby is, amended to read as follows:

- To function as an interim legislative authority of Convention, performing such specific functions as are delegated to it by Convention, the Constitution, and these Canons. Such duties shall include, but not be limited to, administering the business, and the budget and financial resources of the Diocese as described in the Statement of Mission described in Title V, Canon 1; *provided, however*, the Standing Committee shall have no authority to legislate with respect to any matter exclusively reserved by the Constitution or Canons to the legislative authority of Convention.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

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PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the “Committee”)

Subject: Amendment of Title III, Canon 2, Section 3 and Title VIII, Canon 10, Section 1 of the Canons of the Episcopal Diocese of Upper South Carolina (the “Canons”) – Interim authority of Standing Committee to authorize the Ecclesiastical Authority to convert a Parish to Mission status

WHEREAS, Title III, Canon 2, Section 3 sets forth the responsibilities of the Standing Committee of the Episcopal Diocese of Upper South Carolina (the “Standing Committee”); and

WHEREAS, Title VIII, Canon 10, Section 1 of the Canons sets out the requirements for converting a Parish to Mission status, which include approval of Convention of the Episcopal Diocese of Upper South Carolina; and

WHEREAS, there have been a number of occasions when, for the health of the congregation concerned, the Ecclesiastical Authority has deemed it prudent to convert a Parish to Mission status on an emergency basis without the prior approval of Convention required by Title VIII, Canon 10, Section 1; and

WHEREAS, in such instances, the Ecclesiastical Authority has convened a special meeting of the Standing Committee to seek interim approval to take such action, and the action has then been submitted for ratification or reversal to the next immediately succeeding Convention; and

WHEREAS, the Canons do not currently expressly provide for this procedure among the responsibilities of the Standing Committee, though the authority seems implied; and

WHEREAS, the Committee, therefore, recommends amending Title III, Canon 2, Section 3 to formally provide for such a procedure among the responsibilities of the Standing Committee, and to ensure that there are appropriate checks and balances on both the actions of the Ecclesiastical Authority and the Standing Committee in the case of such emergency action; and

WHEREAS, if Title III, Canon 2, Section 3 is amended to include the procedure for emergency action as set forth above, the Committee recommends also amending Title VIII, Canon 10, Section 1 to include a parallel provision.

NOW, THEREFORE BE IT RESOLVED, that a new bullet point be, and hereby is, added to Title III, Canon 2, Section 3 of the Canons of the Episcopal Diocese of Upper South Carolina, which shall read as follows:

- Upon the failure on the part of a Parish to maintain the conditions for status as a Parish, to approve, on an interim basis, the Ecclesiastical Authority's placing the Parish in Mission status; *provided, however*, such action shall be submitted for ratification or reversal to the next immediately succeeding Convention.

And, further,

RESOLVED, that Title VIII, Canon 10, Section 1 of the Canons of the Episcopal Diocese of Upper South Carolina be, and it hereby is, amended to read as follows:

SECTION 1. FAILURE TO MAINTAIN CONDITIONS.

Failure on the part of a Parish to maintain the conditions for status as a Parish shall warrant the Ecclesiastical Authority, with the approval of Convention, in placing said Parish in the status of Mission. Under such conditions the Ecclesiastical Authority shall have the right to appoint a vicar. The Ecclesiastical Authority's placing a Parish in Mission status may be approved by the Standing Committee on an interim basis; *provided, however*, such action shall be submitted for ratification or reversal to the next immediately succeeding Convention.

And, further,

RESOLVED, that adoption of each of the two foregoing resolutions be, and hereby is, contingent upon adoption of the other, and neither resolution shall be adopted unless both resolutions are adopted.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

Please return completed forms on or before September 11, 2022

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as "special" resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Fax: 803-799-5119

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: August 25, 2022

Offered by: Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina (the "Committee")

Subject: Amendment of Title VIII, Canon 9, Section 3 of the Canons of the Episcopal Diocese of Upper South Carolina (the "Canons")

WHEREAS, Title VIII, Canon 9, Section 3 of the Canons currently only gives the deadline for certification of delegates to an Annual Convention; and

WHEREAS, for convenience of reference, the Committee recommends amending Title VIII, Canon 9, Section 3 of the Canons also to add the deadline for certification of delegates to a Special Convention as set forth in Title I, Canon 3, Section 1(a) of the Canons.

NOW, THEREFORE BE IT RESOLVED, that Title VIII, Canon 9, Section 3 of the Canons of the Episcopal Diocese of Upper South Carolina be, and it hereby is, amended to include the deadline for certification of delegates to a Special Diocesan Convention, and thereby to read as follows:

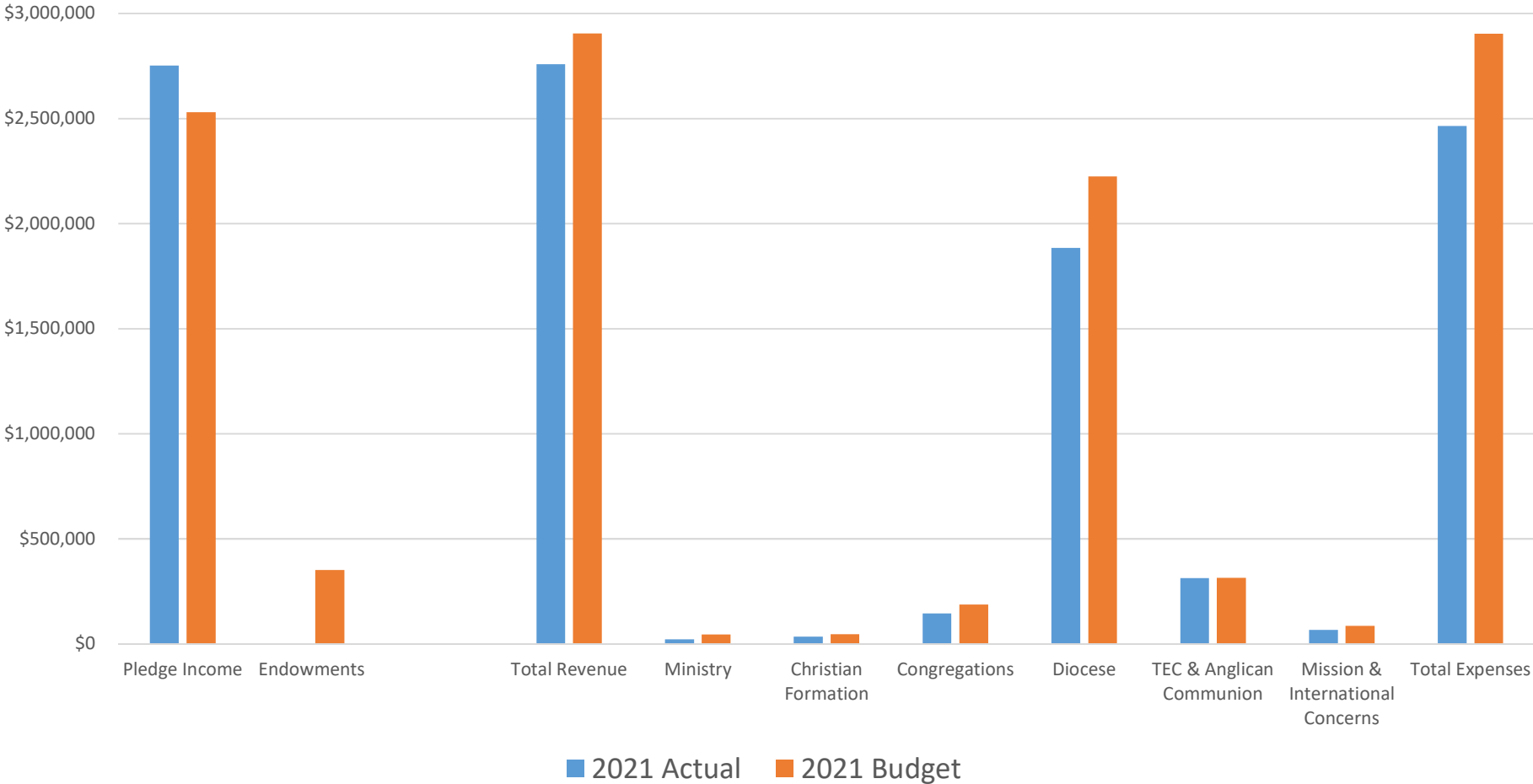
SECTION 3. DUTY TO SEND DELEGATES TO CONVENTION.

It shall be the duty of every Parish or Mission in union with Convention to send delegates to every Convention. It shall be the duty of every Vestry and Mission Committee to forward to the Secretary of Convention, not later than six months prior to an Annual Convention date or thirty days prior to a Special Convention date, a certified list of the delegates and alternates elected to represent the Parish or Mission, in order to aid in preparing a list of members of Convention. Such list of delegates and alternates shall be accompanied by a certification, signed by the rector, vicar, secretary of the Vestry, or one of the wardens, in the following form: *[The remainder of this section shall remain unchanged.]*

Overview of 2021 Actual Expenditures Compared to 2021 SOM

		2021 Actual	2021 Budget	% of Budget
	<u>Diocesan Resources (Income)</u>			
3	Episcopal Pledge Income (16%)	\$2,752,535	\$2,529,465	108.82%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$351,014	0.00%
9	Total Revenue	\$2,758,961	\$2,905,479	94.96%
	<u>Expenses:</u>			
26	Commission on Ministry	\$21,625	\$44,000	49.15%
35	Commission on Christian Formation	\$34,163	\$45,850	74.51%
52	Commission on Congregations	\$144,697	\$188,248	76.87%
101	Commission on the Diocese	\$1,883,663	\$2,223,626	84.71%
107	Commission on TEC & Anglican Communion	\$312,907	\$315,019	99.33%
119	Commission on Mission & International Concerns	\$67,092	\$86,500	77.563%
120	Total Expenses	\$2,464,146	\$2,903,243	84.88%
121	Net (Deficit) / Surplus	\$294,815	\$2,236	

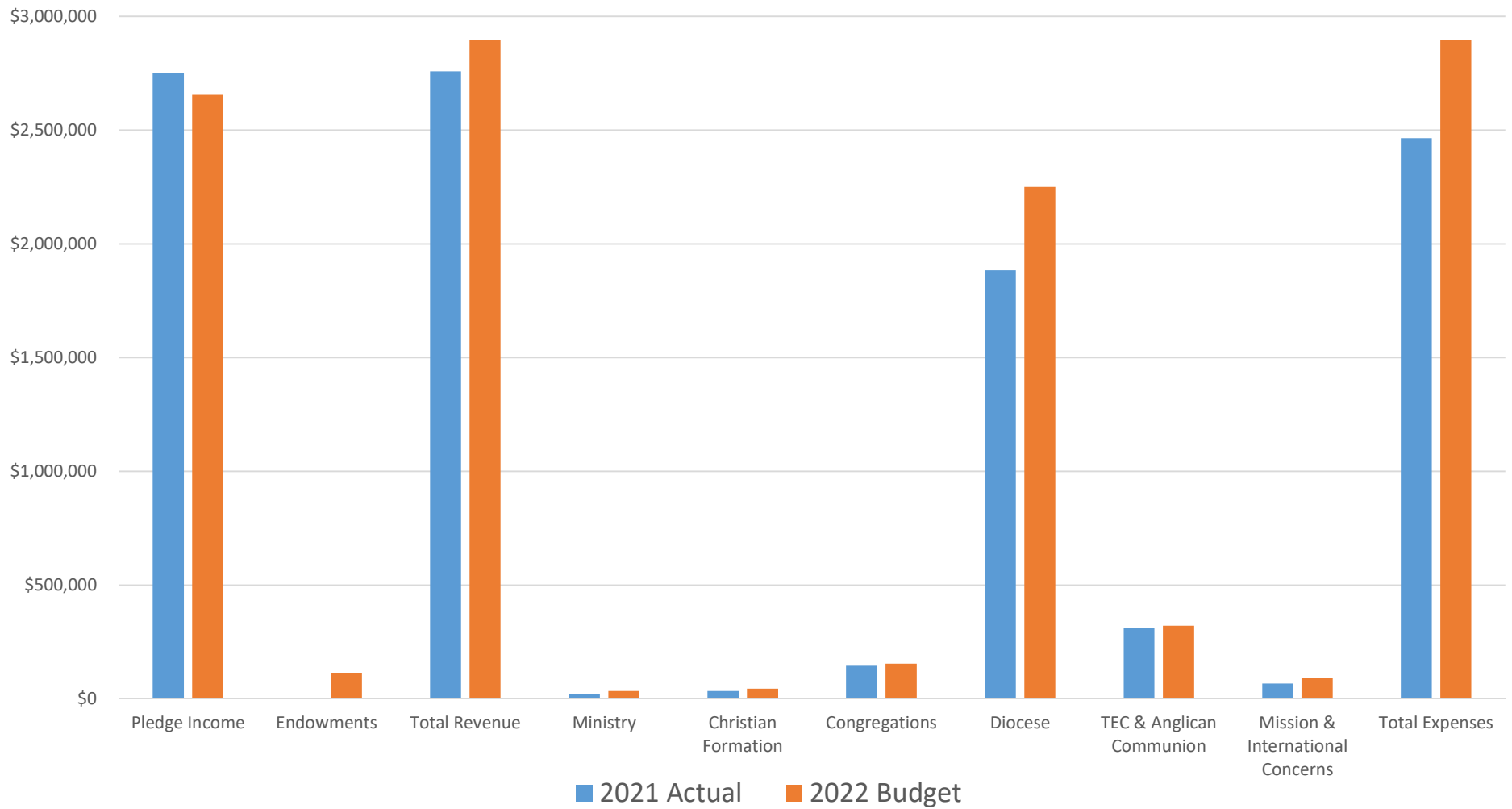
Overview of 2021 Actual Expenditures
Compared to 2021 SOM



Overview of 2021 Actual Expenditures Compared to 2022 SOM

		2021 Actual	Actual / Actual Total	2022 Budget	Budget / Budget Total
	<u>Diocesan Resources (Income)</u>				
	Episcopal Pledge Income (16%)	\$2,752,535	99.77%	\$2,655,000	91.71%
	Support for Theological Ed. (Endowment)	\$5,495	0.20%	\$8,400	0.29%
	Continuing Ed. for Clergy (Endowment)	\$931	0.03%	\$1,400	0.05%
	Withdrawals from Diocesan Endowment Portfolio	\$0	0.00%	\$115,090	3.98%
	30% Surplus from 2021 (2022)	\$0	0.00%	\$75,000	2.59%
	Episcopal Diocese Grant (2022)	\$0	0.00%	\$40,000	1.38%
	Emergency Congregational Support (2021)	\$0	0.00%	\$0	0.00%
	Total Revenue	\$2,758,961		\$2,894,890	
	<u>Expenses:</u>				
	Commission on Ministry	\$21,625	0.78%	\$34,000	1.17%
	Commission on Christian Formation	\$34,163	1.24%	\$44,400	1.53%
	Commission on Congregations	\$144,697	5.24%	\$154,200	5.33%
	Commission on the Diocese	\$1,883,663	68.27%	\$2,250,076	77.73%
	Commission on TEC & Anglican Communion	\$312,907	11.34%	\$321,364	11.10%
	Commission on Mission & International Concerns	\$67,092	2.43%	\$90,850	3.14%
	Total Expenses	\$2,464,146		\$2,894,890	
	Net (Deficit) / Surplus	\$294,815	10.69%	\$0	0.00%

Overview of 2021 Actual Compared to 2022 SOM



September 2022 SOM Summary Report

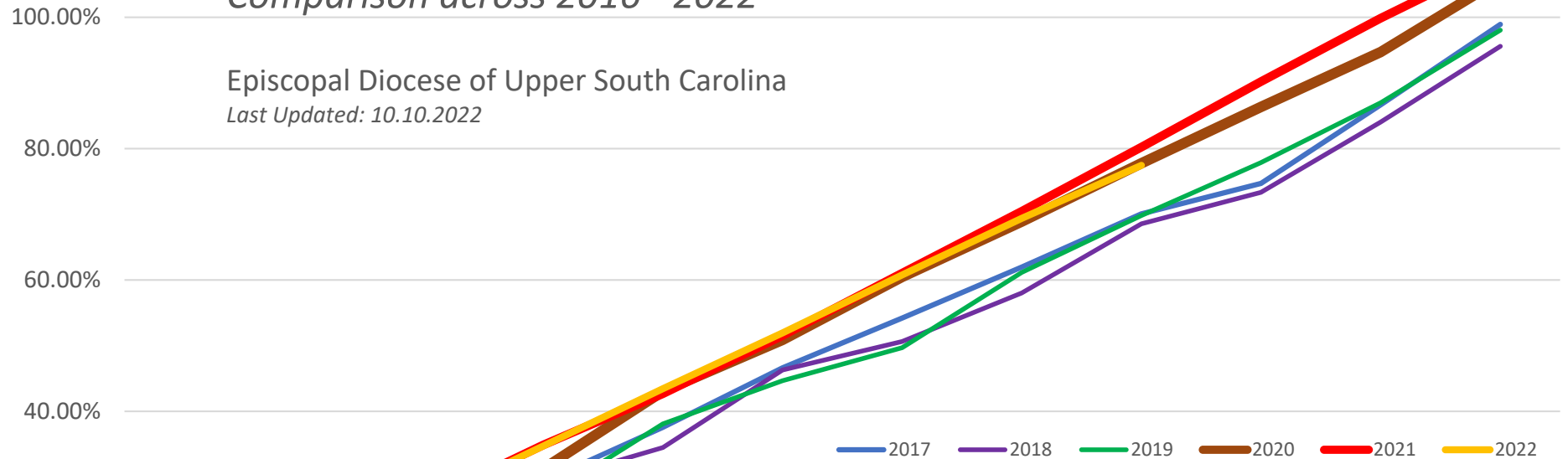
		September	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Diocesan Resources (Income)</u>							
3	Episcopal Pledge Income (16%)	\$214,212	\$221,250	\$2,056,412	\$1,991,250.00	103.27%	\$2,655,000	77.45%
	Prior Year Pledge Income	\$0	\$0	\$2,242	\$0	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$1,723	\$700	\$3,042	\$6,300	48.29%	\$8,400	36.22%
5	Continuing Ed. for Clergy (Endowment)	\$292	\$116.67	\$516	\$1,050	49.10%	\$1,400	36.83%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$9,591	\$0	\$86,318	0.00%	\$115,090	0.00%
7	30% Surplus from 2021	\$0	\$6,250	\$0	\$56,250	0.00%	\$75,000	0.00%
8	Episcopal Diocese Grant	\$0	\$3,333	\$40,000	\$30,000	133.33%	\$40,000	100.00%
9	Emergency Congregational Support	\$0	\$0	\$0	\$0	0.00%	\$0	0.00%
10	Total Revenue	\$216,226	\$241,241	\$2,102,211	\$2,171,168	96.82%	\$2,894,890	72.62%
	<u>Diocesan Expenses</u>							
26	Commission on Ministry	\$15,475	\$2,833	\$6,384	\$25,500	25.03%	\$34,000	18.78%
35	Commission on Christian Formation	(\$34)	\$3,700	\$12,144	\$33,300	36.47%	\$44,400	27.35%
50	Commission on Congregations	\$10,383	\$12,850	\$99,500	\$115,650	86.04%	\$154,200	64.53%
96	Commission on the Diocese	\$146,607	\$187,506	\$1,579,036	\$1,687,557	93.57%	\$2,250,076	70.18%
102	Commission on TEC & Anglican Communion	\$23,006	\$26,780	\$243,003	\$241,023	100.82%	\$321,364	75.62%
115	Commission on Mission & International Concerns	\$17,495	\$7,571	\$74,845	\$68,138	109.84%	\$90,850	82.38%
116	Total Expenses	\$212,932	\$241,241	\$2,014,912	\$2,171,168	92.80%	\$2,894,890	69.60%
117	Net (Deficit) / Surplus	\$3,294	\$0	\$87,299	\$0		\$0	

Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2016 - 2022

Episcopal Diocese of Upper South Carolina

Last Updated: 10.10.2022



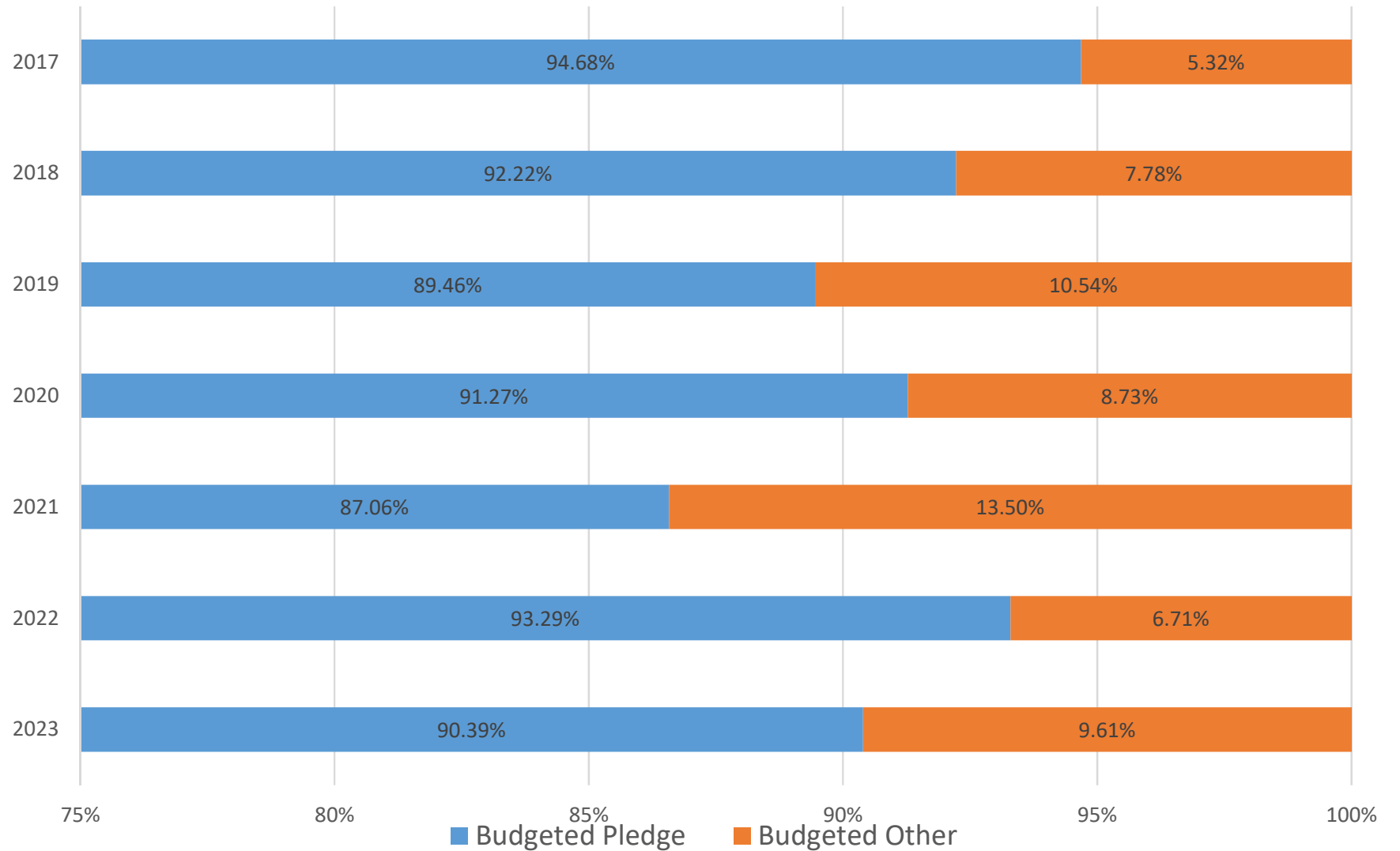
	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2017	2.37%	9.87%	18.27%	29.33%	37.56%	46.62%	54.20%	61.97%	70.07%	74.70%	86.67%	98.92%
2018	3.93%	8.63%	18.81%	29.15%	34.48%	46.29%	50.63%	58.02%	68.55%	73.35%	84.04%	95.58%
2019	4.24%	12.52%	19.83%	26.63%	38.09%	44.66%	49.69%	61.15%	69.81%	77.88%	86.98%	98.04%
2020	5.44%	14.87%	21.91%	31.24%	43.05%	50.87%	60.47%	68.89%	77.77%	86.35%	94.71%	105.79%
2021	7.65%	16.69%	26.17%	34.87%	42.68%	51.53%	61.04%	70.46%	80.23%	90.21%	99.86%	108.82%
2022	7.70%	16.91%	26.06%	34.72%	43.44%	51.94%	60.77%	69.39%	77.45%			

	<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022	Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
	DIOCESAN RESOURCES				
1	Episcopal Pledge Assessments		\$3,527,433	\$3,360,000	(\$167,433)
2	Less: Allowance for Unaccepted Pledge Assessments		(\$872,433)	(\$560,000)	\$312,433
3	Episcopal Pledge Income		\$2,655,000	\$2,800,000	\$145,000
4	Support for Theological Ed. (Endowment)		\$8,400	\$5,500	(\$2,900)
5	Continuing Ed. for Clergy (Endowment)		\$1,400	\$930	(\$470)
6	Transfer from Diocesan Endowment Portfolio		\$115,090	\$155,269.50	\$40,180
7	Transfer of 30% of 2022 projected surplus		\$75,000	\$88,000	\$13,000
8	Episcopal Diocese Grant (Only for 2022)		\$40,000	\$0	(\$40,000)
9	Transfer from Canterbury Funds for Young Adult Ministry		\$0	\$47,900	\$47,900
10	Total Resources		\$2,894,890	\$3,097,599.5	\$202,710
	DIOCESAN EXPENSES				
26	Commission on Ministry		\$34,000	\$57,050	\$23,050
35	Commission on Christian Formation		\$44,400	\$109,104	\$64,704
50	Commission for Congregations		\$154,200	\$176,200	\$22,000
51	Commission on Convocations		\$0	\$0	\$0
97	Commission on the Diocese		\$2,250,076	\$2,334,779	\$84,703
103	Comm. on The Episcopal Church & The Anglican Communion		\$321,364	\$327,566	\$6,202
116	Commission on Mission & International Concerns		\$90,850	\$92,900	\$2,050
118	Total Expenses		\$2,894,890	\$3,097,599	\$202,709
119	Net (Deficit) / Surplus		\$0	\$0	\$0

Pledge Income to Total Resources Budgeted and Expended

	Budgeted Pledge	Budgeted Other	Total Budgeted	Actual Pledge	Actual Other	Total Actual
2023	90.39%	9.61%	\$ 3,097,600			
2022	93.29%	6.71%	\$ 2,845,890			
2021	87.06%	13.50%	\$ 2,905,479	99.77%	0.23%	\$ 2,758,961
2020	91.27%	8.73%	\$ 2,870,508	99.64%	0.36%	\$ 2,781,559
2019	89.46%	10.54%	\$ 3,052,294	96.71%	4.66%	\$ 2,808,137
2018	92.22%	7.78%	\$ 2,954,835	99.32%	0.68%	\$ 2,622,326
2017	94.68%	5.32%	\$ 2,799,130	99.65%	0.35%	\$ 2,630,819

Pledge Income to Total Income 2017 - 2023



**The Episcopal Diocese of Upper South Carolina
Statement of Mission Summary Report
December 2021**

		December	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Diocesan Resources (Income)</u>							
3	Episcopal Pledge Income (16%)	\$226,537	\$210,789	\$2,752,535	\$2,529,465.00	108.82%	\$2,529,465	108.82%
4	Support for Theological Ed. (Endowment)	\$4,542	\$0	\$5,495	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$770	\$0	\$931	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$29,251	\$0	\$351,014	0.00%	\$351,014	0.00%
7	Expenditure of Restricted & Designated Funds	\$0	\$0	\$0	\$0	0.00%	\$0	0.00%
8	Emergency Congregational Support	\$0	\$2,083	\$0	\$25,000	0.00%	\$25,000	0.00%
9	Total Revenue	\$231,849	\$242,123	\$2,758,961	\$2,905,479	94.96%	\$2,905,479	94.96%
	Expenses:							
26	Commission on Ministry	\$8,500	\$3,667	\$21,625	\$44,000	49.15%	\$44,000	49.15%
35	Commission on Christian Formation	\$36,481	\$3,821	\$34,163	\$45,850	74.51%	\$45,850	74.51%
52	Commission on Congregations	\$9,608	\$15,687	\$144,697	\$188,248	76.87%	\$188,248	76.87%
101	Commission on the Diocese	\$97,698	\$185,302	\$1,883,663	\$2,223,626	84.71%	\$2,223,626	84.71%
107	Commission on TEC & Anglican Communion	\$26,073	\$26,252	\$312,907	\$315,019	99.33%	\$315,019	99.33%
119	Commission on Mission & International Concerns	\$5,714	\$7,208	\$67,092	\$86,500	77.56%	\$86,500	77.56%
120	Total Expenses	\$184,074	\$241,937	\$2,464,146	\$2,903,243	84.88%	\$2,903,243	84.88%
121	Net (over)/under	\$47,774	\$186	\$294,815	\$2,236		\$2,236	
	Note: Health Ins. Is prepaid a month in advance.							

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2021

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Resources (Income)								
3	Episcopal Pledge Income (16%)	\$226,537	\$210,789	107.47%	\$2,752,535	\$2,529,465	108.82%	\$2,529,465	108.82%
4	Support for Theological Ed. (Endowment)	\$4,542	\$0	0.00%	\$5,495	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$770	\$0	0.00%	\$931	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$29,251	0.00%	\$0	\$351,014	0.00%	\$351,014	0.00%
7	Expenditure of Restricted & Designated Funds	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
8	Emergency Congregational Support	\$0	\$2,083	0.00%	\$0	\$25,000	0.00%	\$25,000	0.00%
9	Total Revenue	\$231,849	\$242,123	95.76%	\$2,758,961	\$2,905,479	94.96%	\$2,905,479	94.96%
	Expenses:								
	Commission on Ministry								
10	COM: Leadership Development	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Ordained Ministry								
11	Clergy Pre-Lenten Retreat	\$6,000	\$556	0.00%	\$6,000	\$6,667	0.00%	\$6,667	0.00%
12	Fall Clergy Conference	\$0	\$647	0.00%	\$0	\$7,767	0.00%	\$7,767	0.00%
13	Ministry of Clergy Spouses	\$0	\$17	0.00%	\$0	\$200	0.00%	\$200	0.00%
14	Deacons	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
15	New Clergy Leadership Development	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
16	Clergy Continuing Education	\$0	\$100	0.00%	\$600	\$1,200	50.00%	\$1,200	50.00%
17	Committee for Retired Clergy/Spouses	\$500	\$125	400.00%	\$1,337	\$1,500	89.11%	\$1,500	89.11%
	Discernment and Theological Ed.								
18	Vocational Discernment	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
19	Deacon Formation Program	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
20	Seminarian Insurance	\$0	\$1,000	0.00%	\$3,696	\$12,000	30.80%	\$12,000	30.80%
21	Theological Education Assistance	\$0	\$667	0.00%	\$7,992	\$8,000	99.90%	\$8,000	99.90%
22	NEW - Seminarian Retreat	\$2,000	\$556	0.00%	\$2,000	\$6,667	0.00%	\$6,667	0.00%
23	Seminarian Travel	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
24	Seminarian Emergency Funds	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
25	New - Seminarian Book Funds								
26	Commission on Ministry	\$8,500	\$3,667	231.82%	\$21,625	\$44,000	49.15%	\$44,000	49.15%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2021

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission for Christian Formation</u>								
27	Order of the Daughters of the King	\$0	\$142	0.00%	\$1,700	\$1,700	100.00%	\$1,700	100.00%
28	Cursillo	\$0	\$558	0.00%	\$165	\$6,700	2.46%	\$6,700	2.46%
29	Children's Ministry	\$5,479	\$375	1460.95%	\$3,979	\$4,500	88.43%	\$4,500	88.43%
	General Children's Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	5th Grade Bridge Retreat	\$5,479	\$375	1460.95%	\$3,979	\$4,500	88.43%	\$4,500	88.43%
30	Youth Ministry	\$29,489	\$2,600	1134.19%	\$25,387	\$31,200	81.37%	\$31,200	81.37%
	Happening	\$23,981	\$1,850	1296.27%	\$18,325	\$22,200	82.55%	\$22,200	82.55%
	General Youth Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: Middle School Fall Lock-in	\$3,568	\$392	910.96%	\$4,087	\$4,700	86.95%	\$4,700	86.95%
	YM: New Beginnings	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: High School Spring Retreat	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: High School Fall Lock-in	\$1,940	\$183	1058.18%	\$2,200	\$2,200	100.00%	\$2,200	100.00%
	YM: EYE: Epis. Youth Event	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: PYE: Provincial Youth Event	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: PYNM: Provinc Youth Network Mtg	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: DYLC: Dioc. Youth Lead. Comm.	\$0	\$175	0.00%	\$775	\$2,100.00	36.89%	\$2,100	36.89%
31	Adult Formation Ministry	\$1,514	\$0	0.00%	\$1,182	\$0.00	0.00%	\$0	0.00%
	Safe Church Trainers	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Adult Formation Ministry	\$1,514	\$0	0.00%	\$1,182	\$0	0.00%	\$0	0.00%
	Safe Church Trainers <i>*Now included in Adult Formation*</i>								
32	Community of Hope	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
33	Education for Ministry	\$0	\$146	0.00%	\$1,750	\$1,750	100.00%	\$1,750	100.00%
34	Episcopal Church Women	\$0	\$0	0.00%	\$0	\$0.00	0.00%	\$0	0.00%
35	Commission on Christian Formation	\$36,481	\$3,821	954.80%	\$34,163	\$45,850	74.51%	\$45,850	74.51%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2021

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission on Congregations</u>								
	<i>Hispanic Ministries</i>								
36	Holy Cross, Simpsonville - Hispanic Ministries	\$2,400	\$1,469	163.33%	\$5,733	\$17,633	32.51%	\$17,633	32.51%
37	St. Francis, Greenville - Hispanic Ministries	\$1,260	\$2,927	43.06%	\$35,125	\$35,125	100.00%	\$35,125	100.00%
	<i>African American Ministries</i>								
38	St. Thomas, Eastover	\$172	\$450	38.23%	\$5,396	\$5,396	100.00%	\$5,396	100.00%
	<i>New Ways of Being Church</i>								
39	Church of the Cross, Columbia	\$688	\$965	71.23%	\$11,583	\$11,583	100.00%	\$11,583	100.00%
40	Diocesan Curate Support	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
41	Young Adult Communities: Campus Ministries	\$2,837	\$4,258	66.62%	\$19,447	\$51,098	38.06%	\$51,098	38.06%
	YAM: Canterbury Communities (General Expenses)	\$2,214	\$379	584.36%	\$2,274	\$4,547	50.02%	\$4,547	50.02%
	YAM: Clemson Canterbury	\$0	\$292	0.00%	\$3,503	\$3,500	100.08%	\$3,500	100.08%
	YAM: Furman Canterbury	\$0	\$167	0.00%	\$0	\$2,000	0.00%	\$2,000	0.00%
	YAM: Presbyterian Coll. Canterbury	\$0	\$167	0.00%	\$377	\$2,000	18.86%	\$2,000	18.86%
	YAM: Univ. S.C. Canterbury	\$576	\$375	153.70%	\$4,714	\$4,500	104.77%	\$4,500	104.77%
	YAM: Rock Hill Canterbury	\$0	\$988	0.00%	\$8,351	\$11,851	70.46%	\$11,851	70.46%
	YAM: Spartanburg Canterbury	\$47	\$292	15.95%	\$228	\$3,500	6.51%	\$3,500	6.51%
	YAM: Clemson Canterbury Stipend	\$1,600	\$267	600.00%	\$3,200	\$3,200	100.00%	\$3,200	100.00%
	YAM: Furman Canterbury Stipend	\$1,600	\$267	600.00%	\$3,200	\$3,200	100.00%	\$3,200	100.00%
	YAM: Presbyterian Coll. Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$3,200	50.00%	\$3,200	50.00%
	YAM: Univ. S.C. Canterbury Stipend	\$1,600	\$267	600.00%	\$3,200	\$3,200	100.00%	\$3,200	100.00%
	YAM: Rock Hill Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$3,200	50.00%	\$3,200	50.00%
	YAM: Spartanburg Canterbury Stipend	\$1,600	\$267	600.00%	\$3,200	\$3,200	100.00%	\$3,200	100.00%
43	Episcopal Service Corps	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	<i>Continuing Support</i>								
44	NEW - Ascension, Seneca	\$0	\$1,309	0.00%	\$15,708	\$15,708	100.00%	\$15,708	100.00%
45	All Saints', Beech Island	\$330	\$443	74.53%	\$5,313	\$5,313	100.00%	\$5,313	100.00%
46	St. Christopher's, Spartanburg	\$584	\$862	67.78%	\$10,346	\$10,346	100.00%	\$10,346	100.00%
47	New- St. Bartholomew's, North Augusta	\$1,005	\$1,005	100.00%	\$12,060	\$12,060	100.00%	\$12,060	100.00%
48	Epiphany, Spartanburg	\$332	\$1,999	16.62%	\$23,987	\$23,988	100.00%	\$23,988	100.00%
	<i>Congregational & Stewardship Development</i>								
49	Congregational Workshops	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
50	Congregational Vitality and Sustainability	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
51	Stewardship (TENS membership)	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
52	Commission on Congregations	\$9,608	\$15,687	61.25%	\$144,697	\$188,248	76.87%	\$188,248	76.87%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2021

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
Commission on Convocations									
53	Commission on Convocations	\$0	\$0		\$0	\$0		\$0	
Commission on the Diocese									
Clergy Insurance									
54	Group Long-Term Disability	\$1,279	\$1,750	73.06%	\$14,051	\$21,000	66.91%	\$21,000	66.91%
55	Group Insurance - Active Clergy	(\$29,619)	\$53,760	-55.09%	\$575,428	\$645,120	89.20%	\$645,120	89.20%
56	Group Insurance - Retired	(\$2,999)	\$10,417	-28.79%	\$103,404	\$125,000	82.72%	\$125,000	82.72%
57	Subtotal - Clergy Insurance	(\$31,339)	\$65,927	-47.54%	\$692,883	\$791,120	87.58%	\$791,120	87.58%
Office of the Bishop									
58	Bishop Stipend	\$13,267	\$13,267	100.00%	\$159,200	\$159,200	100.00%	\$159,200	100.00%
59	Bishop Pension	\$2,388	\$2,388	100.00%	\$28,656	\$28,656	100.00%	\$28,656	100.00%
60	Bishop Insurance	\$0	\$1,838	0.00%	\$23,124	\$22,050	104.87%	\$22,050	104.87%
61	Bishop's Staff Stipends & Benefits	\$39,595	\$58,875	67.25%	\$647,179	\$706,500	91.60%	\$706,500	91.60%
62	Staff FICA	\$2,190	\$2,167	101.06%	\$21,528	\$26,000	82.80%	\$26,000	82.80%
63	Short-term disability	\$0	\$200	0.00%	\$1,271	\$2,400	52.97%	\$2,400	52.97%
64	Episcopal Visitations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
65	Diocesan House Admin. Expenses	\$9,688	\$10,333.33	93.75%	\$78,294	\$124,000.00	63.14%	\$124,000	63.14%
66	Bishop Travel, Continuing Ed. & Hospitality	\$8,204	\$2,500	328.17%	\$17,380	\$30,000	57.93%	\$30,000	57.93%
67	Canon Staff Travel	\$1,522	\$2,500	60.87%	\$5,795	\$30,000	19.32%	\$30,000	19.32%
68	Non-Canon Staff Conferences/Continuing Ed/Travel	\$1,145	\$1,250	91.57%	\$3,072	\$15,000	20.48%	\$15,000	20.48%
69	Property manager shared with Trinity	\$1,000	\$1,000	100.00%	\$12,000	\$12,000	100.00%	\$12,000	100.00%
70	DH Capital Maintenance Fund	\$0	\$833	0.00%	\$2,370	\$10,000	23.70%	\$10,000	23.70%
71	New - Repayment of Diocean House Renovations Funds	\$0	\$1,650	0.00%	\$0	\$19,800	0.00%	\$19,800	0.00%
72	Communications (e-DUSC, Web, on-line registratons)	\$279	\$2,083	13.40%	\$10,138	\$25,000	40.55%	\$25,000	40.55%
73	Bishop Search Expenditures	\$25,619	\$12,500	204.95%	\$104,665	\$150,000	69.78%	\$150,000	69.78%
74	Subtotal - Office of the Bishop	\$104,895	\$113,384	92.51%	\$1,114,672	\$1,360,606	81.92%	\$1,360,606	81.92%
Bishop's Events:									
75	Clergy Business Day	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
76	Ordinations - Diaconate	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
77	Ordinations - Priesthood	\$0	\$0	0.00%	\$208	\$0	0.00%	\$0	0.00%
78	Ordinations - Transitional Diaconate	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
79	Renewal of Vows	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
80	Celebrations of New Ministries	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
81	Subtotal - Bishop's Events	\$0	\$42	0.00%	\$208	\$500	41.66%	\$500	41.66%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2021

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
Diocesan Institutions									
82	All Saints', Clinton for facilities use	\$83	\$83.33	100.00%	\$500	\$1,000	50.00%	\$1,000	50.00%
83	Still Hopes	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
84	Finlay House	\$0	\$42	0.00%	\$500	\$500	100.00%	\$500	100.00%
85	Gravatt	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
86	Univ. of the South School of Theology (Sewanee)	\$0	\$333	0.00%	\$4,000	\$4,000	100.00%	\$4,000	100.00%
87	Voorhees	\$0	\$125	0.00%	\$1,500	\$1,500	100.00%	\$1,500	100.00%
88	Heathwood Hall Episcopal School	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
89	Kanuga	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
90	Subtotal - Diocesan Institutions	\$83	\$833	10.00%	\$9,500	\$10,000	95.00%	\$10,000	95.00%
Diocesan Convention									
91	Diocesan Convention - Leadership & Business Days	\$8,530	\$1,250.00	682.38%	\$13,899	\$15,000.00	92.66%	\$15,000	92.66%
92	Convention Secretary	\$200	\$200	100.00%	\$2,400	\$2,400	100.00%	\$2,400	100.00%
93	Subtotal - Diocesan Convention	\$8,730	\$1,450	782.38%	\$16,299	\$17,400	192.66%	\$17,400	93.68%
Diocesan Executive Council									
94	Diocesan Executive Council	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
95	D.E.C. Orientation & Planning	\$1,529	\$42	3668.83%	\$2,411	\$500	482.14%	\$500	482.14%
96	Audit & Accounting Services	\$13,800	\$1,667	828.00%	\$27,150	\$20,000	135.75%	\$20,000	135.75%
97	Insurance - Property, Liability, Bond	\$0	\$1,250	0.00%	\$18,901	\$15,000	126.01%	\$15,000	126.01%
98	Real Property Expenses	\$0	\$417	0.00%	\$1,412	\$5,000	28.24%	\$5,000	28.24%
99	NEW - Diocesan Chancellors	\$0	\$250	0.00%	\$225	\$3,000	7.50%	\$3,000	7.50%
100	Subtotal - Diocesan Executive Council	\$15,329	\$3,667	418.05%	\$50,099	\$44,000	113.86%	\$44,000	113.86%
101	Commission on the Diocese	\$97,698	\$185,302	52.72%	\$1,883,663	\$2,223,626	84.71%	\$2,223,626	84.71%

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2021**

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
<u>Comm. on The Episcopal Church & the Anglican Communion</u>									
102	Province IV Pledge	\$173	\$296	58.33%	\$2,072	\$3,552	58.33%	\$3,552	58.33%
103	Diocesan Pledge to The Episcopal Church	\$24,236	\$24,206	100.13%	\$290,835	\$290,467	100.13%	\$290,467	100.13%
104	Deputies to General & Synod Convention	\$1,250	\$1,250	100.00%	\$15,000	\$15,000	100.00%	\$15,000	100.00%
105	Lambeth Conference	\$414	\$417	99.28%	\$5,000	\$5,000.00	100.00%	\$5,000	100.00%
106	Ecumenical Relations	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
107	Commission on TEC & Anglican Communion	\$26,073	\$26,252	99.32%	\$312,907	\$315,019	99.33%	\$315,019	99.33%
<u>Commission on Mission & International Concerns</u>									
108	Episcopal Relief & Development	\$2,819	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
109	Sustainable Development (Millennium) Goals	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
110	World Mission Committee - Cange	\$0	\$2,027	0.00%	\$10,000	\$24,325	41.11%	\$24,325	41.11%
111	Ecuador Programs	\$0	\$2,027	0.00%	\$24,100	\$24,325	99.08%	\$24,325	99.08%
112	SC Bishops' Public Education Initiative	\$2,895	\$1,196	242.11%	\$17,002	\$14,350	118.48%	\$14,350	118.48%
113	Camp AIR (Adventures in Reading)	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
114	Matthew 25 Outreach Grants	\$0	\$1,250	0.00%	\$15,000	\$15,000	100.00%	\$15,000	100.00%
115	Racial Reconciliation	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
116	HIV/AIDS Committee	\$0	\$83	0.00%	\$400	\$1,000	40.00%	\$1,000	40.00%
117	Voorhees Scholars Program	\$0	\$417	0.00%	\$590	\$5,000	11.80%	\$5,000	11.80%
118	Environmental Stewardship and Justice	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
119	Commission on Mission & International Concerns	\$5,714	\$7,208	79.27%	\$67,092	\$86,500	77.56%	\$86,500	77.56%
120	Total Expenses	\$184,074	\$241,937	76.08%	\$2,464,146	\$2,903,243	84.88%	\$2,903,243	84.88%
121	Net (over)/under	\$47,774	\$186		\$294,815	\$2,236		\$2,236	

2022 Episcopal Pledge Commitment Report

as of 8.26.2022

Church:	Church City:	2022 Lower Pledge Option	2022 Pledge Accepted	Acceptances / Lower Option
Trinity Episcopal Church	Abbeville	\$ 7,462.93	\$ 7,613	102.02%
St Augustine of Canterbury	Aiken	\$ 34,348	\$ 34,348	100.00%
St Thaddeus Episcopal Church	Aiken	\$ 117,635	\$ 117,635	100.00%
Grace Episcopal Church	Anderson	\$ 61,776	\$ 61,776	100.00%
St. George's Church	Anderson	\$ 18,780	\$ 18,780	100.00%
All Saints' Episcopal Church	Beech Island	\$ 1,724		0.00%
St Margarets Episcopal Church	Boiling Springs	\$ 22,668	\$ 14,200	62.64%
Grace Episcopal Church	Camden	\$ 58,872	\$ 58,872	100.00%
All Saints' Episcopal Church	Cayce	\$ 18,166	\$ 12,200	67.16%
St Francis of Assisi	Chapin	\$ 44,696	\$ 25,000	55.93%
St Marks Episcopal Church	Chester	\$ 3,867	\$ 3,000	77.58%
Holy Trinity Episcopal Church	Clemson	\$ 90,352	\$ 90,352	100.00%
All Saints' Episcopal Church	Clinton	\$ 23,468	\$ 23,468	100.00%
Church of the Cross	Columbia	\$ 7,293	\$ 7,293	100.00%
Church of the Good Shepherd	Columbia	\$ 68,748	\$ 66,000	96.00%
St David's Episcopal Church	Columbia	\$ 57,728	\$ 57,728	100.00%
St John's Episcopal Church	Columbia	\$ 155,617	\$ 155,617	100.00%
St Luke's Episcopal Church	Columbia	\$ 36,958	\$ 26,200	70.89%
St Martin's in the Fields	Columbia	\$ 176,617	\$ 165,000	93.42%
St Mary's Episcopal Church	Columbia	\$ 61,615	\$ 61,615	100.00%
St Michael & All Angels'	Columbia	\$ 49,070		0.00%
St Timothy's Episcopal Church	Columbia	\$ 23,373	\$ 19,000	81.29%
Trinity Cathedral Church	Columbia	\$ 449,984	\$ 410,000	91.11%
St Michael's Episcopal Church	Easley	\$ 31,757	\$ 22,080	69.53%
St Thomas Church	Eastover	\$ 3,680	\$ 3,680	100.00%
St Paul's Episcopal Church	Fort Mill	\$ 32,996	\$ 18,156	55.02%
Episcopal Church of the Incarnation	Gaffney	\$ 23,010	\$7,200.00	31.29%
Calvary Episcopal Church	Glenn Springs / Pauline	\$ 7,525	\$ 3,748	49.81%
St Paul's Episcopal Church	Graniteville	\$ 7,932	\$ 4,200	52.95%
St Peter's Episcopal Church	Great Falls	\$ 1,953	\$ 1,953	100.00%

2022 Episcopal Pledge Commitment Report

as of 8.26.2022

Church:	Church City:	2022 Lower Pledge Option	2022 Pledge Accepted	Acceptances / Lower Option
Christ Episcopal Church	Greenville	\$ 492,556	\$ 325,460	66.08%
Church of the Redeemer	Greenville	\$ 44,517	\$ 44,517	100.00%
St Andrew's Episcopal Church	Greenville	\$ 39,321	\$ 40,200	102.24%
St Francis Episcopal Church	Greenville	\$ 1,743		0.00%
St James Episcopal Church	Greenville	\$ 101,128	\$ 101,128	100.00%
St Peter's Episcopal Church	Greenville	\$ 101,621	\$ 101,621	100.00%
St Philip's Church	Greenville	\$ 8,991	\$ 8,991	100.00%
Church of the Resurrection	Greenwood	\$ 62,284	\$ 62,284	100.00%
Church of the Good Shepherd	Greer	\$ 23,212	\$ 15,000	64.62%
St John's Episcopal Church	Hopkins / Congaree	\$ 16,140	\$ 16,140	100.00%
Epis Ch of St Simon & St Jude	Irmo	\$ 38,860	\$ 34,185	87.97%
St Barnabas Episcopal Church	Jenkinsville	\$ 7,202	\$ 7,202	100.00%
Christ Episcopal Church	Lancaster	\$ 18,852	\$ 4,000	21.22%
Church of the Epiphany	Laurens	\$ 12,758		0.00%
St Alban's Episcopal Church	Lexington	\$ 33,566	\$ 33,566	100.00%
St Luke's Episcopal Church	Newberry	\$ 11,557		0.00%
St Bartholomew's Episcopal Church	North Augusta	\$ 49,196.16	\$5,000	10.16%
St Stephen's Episcopal Church	Ridgeway	\$ 11,879	\$ 11,879	100.00%
Episcopal Church of Our Saviour	Rock Hill	\$ 67,361	\$ 67,361	100.00%
Church of the Ascension	Seneca	\$ 10,825		0.00%
Holy Cross Episcopal Church	Simpsonville	\$ 77,088	\$ 6,000	7.78%
Episcopal Church of the Advent	Spartanburg	\$ 317,610	\$ 317,610	100.00%
Episcopal Church of the Epiphany	Spartanburg	\$ 1,233	\$ 600	48.66%
St Christopher's Church Episcopal	Spartanburg	\$ 34,634	\$ 7,000	20.21%
St Matthew's Episcopal Church	Spartanburg	\$ 66,077	\$ 66,077	100.00%
Episcopal Church of the Ridge	Trenton	\$ 24,601	\$ 24,601	100.00%
Church of the Nativity	Union	\$ 7,420	\$ 4,500	60.65%
St John's Episcopal Church	Winnsboro	\$ 6,652	\$ 7,438	111.82%
Church of the Good Shepherd	York	\$ 31,909	\$ 31,909	100.00%
Total:		\$ 3,420,464	\$ 2,840,984	83.06%
\$ Budgeted in 2022 SOM:	\$2,655,000		53	Total Received
% of 2022 SOM Committed:	107.01%		6	Total Outstanding
			59	

Accounts

Assets		
Bank Accounts		
Operating Account		
Bishop's Trust Fund CIB	\$58,072.45	
Cash in Bank	\$2,385,903.65	
Total Operating Account	\$2,443,976.10	
Money Market		
Bishop's Discretionary Account	\$7,160.63	
Total Bank Accounts		\$2,808,973.89
Investments		
Perm.Inv.-Perm.Restr.	\$303,820.00	
Perm.Inv.-Temp. Restr.	\$3,206,475.36	
Perm.Investments-Unrest.	\$2,862,811.64	
Total Investments		\$6,373,107.00
Fixed Assets		
Buildings	\$810,113.42	
Furniture & Equipment	\$230,421.36	
Land	\$456,042.46	
Total Fixed Assets		\$1,496,577.24
Other Assets		
Accumulated Depreciation	(\$1,001,500.69)	
Pre-paid Expenses	\$1,550.02	
Total Other Assets		(\$999,950.67)
Accounts Receivables		
A/R Deployment	\$4,745.15	
A/R ECHYP	\$428,850.00	
A/R General	(\$495.25)	
A/R Gravatt	\$96,500.00	
Centennial Campaign Pledge Rec	\$273,736.00	
Pledges Receivable	\$4,200.00	
Total Accounts Receivables		\$807,535.90
A/R Group Health Insurance		
		(\$747.99)
ECH at York Place, Inc.		
ECH Checking		
ECH at York Place, Inc. - Checking	\$81,540.40	
Total ECH Checking	\$81,540.40	
ECH Fixed Assets		
ECHYP - Buildings	\$1,770,000.00	
ECHYP - Furniture & Equipment	\$10,285.91	
ECHYP - Land	\$960,270.91	
Total ECH Fixed Assets	\$2,740,556.82	
ECH Other Assets		
Beneficial Interest - ECHYP - Chale	\$346,626.06	
Beneficial Interest - ECHYP - Taylo	\$1,255,595.45	
ECHYP - Accumulated Depreciation	(\$228,621.56)	
ECHYP Investments- Unrestricted	\$764,349.15	
Total ECH Other Assets	\$2,137,949.10	
Total ECH at York Place, Inc.		\$4,960,046.32
Total Assets		\$15,445,541.69

Liabilities, Fund Principal, & Restricted Funds

Liabilities

A/P Epis. Diocese of Upper SC	\$728,850.00
A/P Year End	(\$1,257.79)
Annuities Payable	\$925.00

Episcopal Diocese of Upper SC
Balance Sheet
September 2022

Accounts

Gifts to Forward	\$6,360.00	
Investments Held for Distribution	(\$7,562.23)	
Investments to Forward	\$325.00	
Prepayment for Event	\$360.00	
Total Liabilities		\$727,999.98
Fund Principal		
Board Designated Net Assets	\$19,960.00	
P.R.N.A.-Investments	\$314,232.50	
T.R.N.A.-Investments	\$4,099,679.05	
Unrestr.N.A.- St. of Miss'n	\$3,715,915.06	
Unrestr.N.A.-HCI	\$241,447.63	
Unrestr.N.A.-Non-SOM	\$1,732,055.60	
ECH at York Place, Inc.		
ECH at York Place Restricted FP	\$2,027,735.26	
ECH at York Place, Inc. - Fund Prnc	\$2,323,600.30	
Total ECH at York Place, Inc.	\$4,351,335.56	
Excess Cash Received	(\$1,596,771.14)	
Total Fund Principal and Excess Cash Received		\$12,877,854.26
Restricted Funds		
Total Temporary Restricted	\$1,839,687.45	
Total Restricted Funds		\$1,839,687.45
Total Liabilities, Fund Principal, & Restricted Funds		\$15,445,541.69

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Summary Report
September 2022**

		September	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Resources (Income)							
3	Episcopal Pledge Income (16%)	\$214,212	\$221,250	\$2,056,412	\$1,991,250.00	103.27%	\$2,655,000	77.45%
	Prior Year Pledge Income	\$0	\$0	\$2,242	\$0.00	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$1,723	\$700	\$3,042	\$6,300	48.29%	\$8,400	36.22%
5	Continuing Ed. for Clergy (Endowment)	\$292	\$117	\$516	\$1,050	49.10%	\$1,400	36.83%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$9,591	\$0	\$86,318	0.00%	\$115,090	0.00%
7	30% Surplus from 2021	\$0	\$6,250	\$0	\$56,250	0.00%	\$75,000	0.00%
8	Episcopal Diocese Grant	\$0	\$3,333	\$40,000	\$30,000	133.33%	\$40,000	100.00%
9	Emergency Congregational Support	\$0	\$0	\$0	\$0	0.00%	\$0	0.00%
10	Total Revenue	\$216,226	\$241,241	\$2,102,211	\$2,171,168	96.82%	\$2,894,890	72.62%
	Expenses:							
26	Commission on Ministry	\$15,475	\$2,833	\$6,384	\$25,500	25.03%	\$34,000	18.78%
35	Commission on Christian Formation	(\$34)	\$3,700	\$12,144	\$33,300	36.47%	\$44,400	27.35%
50	Commission on Congregations	\$10,383	\$12,850	\$99,500	\$115,650	86.04%	\$154,200	64.53%
96	Commission on the Diocese	\$146,607	\$187,506	\$1,579,036	\$1,687,557	93.57%	\$2,250,076	70.18%
102	Commission on TEC & Anglican Communion	\$23,006	\$26,780	\$243,003	\$241,023	100.82%	\$321,364	75.62%
115	Commission on Mission & International Concerns	\$17,495	\$7,571	\$74,845	\$68,138	109.84%	\$90,850	82.38%
116	Total Expenses	\$212,932	\$241,241	\$2,014,912	\$2,171,168	92.80%	\$2,894,890	69.60%
117	Net (over)/under	\$3,294	\$0	\$87,299	\$0		\$0	
	Note: Health Ins. Is prepaid a month in advance.							
	Young Adult Communities: Campus Ministries will be drawing from Investments to cover Expenses using the same budget as 2021 \$51,098.							

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022

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	Diocesan Resources (Income)								
3	Episcopal Pledge Income (16%)	\$214,212	\$221,250	96.82%	\$2,056,412	\$1,991,250	103.27%	\$2,655,000	77.45%
	Prior Year Pledge Income	\$0	\$0	0.00%	\$2,242	\$0	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$1,723	\$700	246.11%	\$3,042	\$6,300	48.29%	\$8,400	36.22%
5	Continuing Ed. for Clergy (Endowment)	\$292	\$117	250.25%	\$516	\$1,050	49.10%	\$1,400	36.83%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$9,591	0.00%	\$0	\$86,318	0.00%	\$115,090	0.00%
7	30% Surplus from 2021	\$0	\$6,250	0.00%	\$0	\$56,250	0.00%	\$75,000	0.00%
8	Episcopal Diocese Grant	\$0	\$3,333	0.00%	\$40,000	\$30,000	133.33%	\$40,000	100.00%
9	Emergency Congregational Support	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
10	Total Revenue	\$216,226	\$241,241	89.63%	\$2,102,211	\$2,171,168	96.82%	\$2,894,890	72.62%
	Expenses:								
	Commission on Ministry								
11	COM: Leadership Development	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Ordained Ministry								
12	Clergy Pre-Lenten Retreat	\$0	\$250	0.00%	(\$5,199)	\$2,250	-231.06%	\$3,000	-173.30%
13	Fall Clergy Conference	\$10,867	\$250	4346.90%	\$267	\$2,250	11.88%	\$3,000	8.91%
14	Ministry of Clergy Spouses	\$0	\$125	0.00%	\$0	\$1,125	0.00%	\$1,500	0.00%
15	Deacons	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
16	New Clergy Leadership Development	\$15	\$83	0.00%	\$924	\$750	123.23%	\$1,000	92.43%
17	Clergy Continuing Education	\$0	\$125	0.00%	\$1,029	\$1,125	91.42%	\$1,500	68.57%
18	Committee for Retired Clergy/Spouses	\$0	\$208	0.00%	\$296	\$1,875	15.80%	\$2,500	11.85%
	Discernment and Theological Ed.								
19	Vocational Discernment	\$0	\$167	0.00%	\$474	\$1,500	31.60%	\$2,000	23.70%
20	Deacon Formation Program	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
21	Theological Education Assistance	\$4,000	\$667	600.00%	\$8,000	\$6,000	133.33%	\$8,000	100.00%
22	Seminarian Retreat	\$592	\$583	101.55%	\$592	\$5,250	11.28%	\$7,000	8.46%
23	Seminarian Travel	\$0	\$125	0.00%	\$0	\$1,125	0.00%	\$1,500	0.00%
24	Seminarian Emergency Funds	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
25	Seminarian Book Funds	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
26	Commission on Ministry	\$15,475	\$2,833	546.17%	\$6,384	\$25,500	25.03%	\$34,000	18.78%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
<u>Commission for Christian Formation</u>									
27	Cursillo	\$0	\$142	0.00%	\$635	\$1,275	49.81%	\$1,700	37.36%
28	Children's Ministry	\$0	\$217	0.00%	\$4,126	\$1,950	211.58%	\$2,600	158.69%
	General Children's Ministry	\$0	\$25	0.00%	\$103	\$225	45.67%	\$300	34.25%
	5th Grade Bridge Retreat	\$0	\$192	0.00%	\$4,023	\$1,725	233.23%	\$2,300	174.92%
29	Youth Ministry	(\$34)	\$2,933	-1.17%	\$6,392	\$26,400	24.21%	\$35,200	18.16%
	Happening	(\$262)	\$1,942	-13.48%	\$3,827	\$17,475	21.90%	\$23,300	16.43%
	General Youth Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: Middle School Fall Lock-in	(\$184)	\$54	-339.49%	(\$448)	\$488	-91.87%	\$650	-68.91%
	YM: New Beginnings	(\$40)	\$188	-21.47%	\$2,043	\$1,688	121.09%	\$2,250	90.82%
	YM: High School Spring Retreat	\$3	\$333	1.00%	\$250	\$3,000	8.32%	\$4,000	6.24%
	YM: High School Fall Lock-in	(\$129)	\$54	-238.93%	(\$213)	\$488	-43.78%	\$650	-32.83%
	YM: EYE: Epis. Youth Event	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: PYE: Provincial Youth Event	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: PYNM: Province Youth Network Mtg	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
	YM: DYLC: Dioc. Youth Lead. Comm.	\$578	\$196	294.95%	\$933	\$1,762.50	52.94%	\$2,350	39.70%
30	Young Adult Communities: Campus Ministries	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
31	Adult Formation Ministry	\$0	\$262.50	0.00%	(\$759)	\$2,362.50	-32.11%	\$3,150	-24.08%
	Safe Church Trainers	\$0	\$45.83	0.00%	\$0	\$412.50	0.00%	\$550	0.00%
	Adult Formation Ministry	\$0	\$216.67	0.00%	(\$759)	\$1,950.00	-38.90%	\$2,600	-29.18%
	Safe Church Trainers <i>*Now included in Adult Formation*</i>								
32	Community of Hope	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
33	Education for Ministry	\$0	\$146	0.00%	\$1,750	\$1,313	133.33%	\$1,750	100.00%
34	Episcopal Church Women	\$0	\$0	0.00%	\$0	\$0.00	0.00%	\$0	0.00%
35	Commission on Christian Formation	(\$34)	\$3,700	-0.93%	\$12,144	\$33,300	36.47%	\$44,400	27.35%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission on Congregations</u>								
	<i>Hispanic Ministries</i>								
36	Holy Cross, Simpsonville - Hispanic Ministries	\$0	\$1,808	0.00%	\$4,800	\$16,275	29.49%	\$21,700	22.12%
37	St. Francis, Greenville - Hispanic Ministries	\$2,050	\$2,250	91.11%	\$18,450	\$20,250	91.11%	\$27,000	68.33%
	<i>African American Ministries</i>								
38	St. Thomas, Eastover	\$333	\$333	100.00%	\$3,000	\$3,000	100.00%	\$4,000	75.00%
	<i>New Ways of Being Church</i>								
39	Church of the Cross, Columbia	\$333	\$333	100.00%	\$3,000	\$3,000	100.00%	\$4,000	75.00%
40	Episcopal Service Corps	\$0	\$0	0.00%	(\$1,387)	\$0	0.00%	\$0	0.00%
	<i>Continuing Support</i>								
41	Ascension, Seneca	\$2,250	\$2,250	100.00%	\$20,250	\$20,250	100.00%	\$27,000	75.00%
42	All Saints', Beech Island	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
43	St. Christopher's, Spartanburg	\$417	\$417	100.00%	\$3,750	\$3,750	100.00%	\$5,000	75.00%
44	St. Bartholomew's, North Augusta	\$1,500	\$1,500	100.00%	\$13,500	\$13,500	100.00%	\$18,000	75.00%
45	Epiphany, Spartanburg	\$1,000	\$1,000	100.00%	\$9,000	\$9,000	100.00%	\$12,000	75.00%
46	New - St. Francis, Chapin	\$2,083	\$2,083	100.00%	\$18,750	\$18,750	100.00%	\$25,000	75.00%
	<i>Congregational & Stewardship Development</i>								
47	Congregational Workshops	\$0	\$333	0.00%	\$0	\$3,000	0.00%	\$4,000	0.00%
48	Congregational Vitality and Sustainability	\$0	\$417	0.00%	\$0	\$3,750	0.00%	\$5,000	0.00%
49	Stewardship (TENS membership)	\$0	\$125	0.00%	\$1,250	\$1,125	111.11%	\$1,500	83.33%
50	Commission on Congregations	\$10,383	\$12,850	80.80%	\$99,500	\$115,650	86.04%	\$154,200	64.53%
	<u>Commission on Convocations</u>								
51	Commission on Convocations	\$0	\$0		\$0	\$0		\$0	
	<u>Commission on the Diocese</u>								
	<i>Clergy Insurance</i>								
52	Group Long-Term Disability	\$1,246	\$1,833	67.94%	\$11,039	\$16,500	66.90%	\$22,000	50.18%
53	Group Insurance - Active Clergy	\$48,748	\$56,448	86.36%	\$542,377	\$508,032	106.76%	\$677,376	80.07%
54	Group Insurance - Retired	\$1,367	\$10,417	13.13%	\$16,496	\$93,750	17.60%	\$125,000	13.20%
	Subtotal - Clergy Insurance	\$51,361	\$68,698	74.76%	\$569,913	\$618,282	92.18%	\$824,376	69.13%

**The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022**

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Office of the Bishop								
55	Bishop Stipend	\$13,250	\$13,250	100.00%	\$119,250	\$119,250	100.00%	\$159,000	75.00%
56	Bishop Pension	\$2,385	\$2,467	96.69%	\$21,465	\$22,200	96.69%	\$29,600	72.52%
57	Bishop Insurance	\$3,370	\$3,250	103.70%	\$35,713	\$29,250	122.09%	\$39,000	91.57%
58	Bishop's Staff Stipends & Benefits	\$59,639	\$58,875	101.30%	\$469,068	\$529,875	88.52%	\$706,500	66.39%
59	Staff FICA	\$1,864	\$2,167	86.05%	\$16,779	\$19,500	86.05%	\$26,000	64.53%
60	Short-term disability	\$111	\$200	55.56%	\$1,111	\$1,800	61.73%	\$2,400	46.30%
61	Episcopal Visitations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
62	Diocesan House Admin. Expenses	\$5,097	\$12,500.00	40.77%	\$92,519	\$112,500.00	82.24%	\$150,000	61.68%
63	Bishop Travel, Continuing Ed., Hospitality & Cell Phone	\$2,964	\$2,500	118.56%	\$35,499	\$22,500	157.77%	\$30,000	118.33%
64	Canons and Archdeacon Travel	\$2,281	\$2,500	91.23%	\$8,589	\$22,500	38.17%	\$30,000	28.63%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
65	Non-Canon Staff Conferences/Continuing Ed/Travel	\$1,398	\$1,250	111.87%	\$3,131	\$11,250	27.83%	\$15,000	20.87%
66	Property manager shared with Trinity	\$1,000	\$1,000	100.00%	\$9,000	\$9,000	100.00%	\$12,000	75.00%
67	DH Capital Maintenance Fund	\$0	\$833	0.00%	\$62,553	\$7,500	834.04%	\$10,000	625.53%
68	Repayment of Diocesan House Renovations Funds	\$0	\$1,650	0.00%	\$19,800	\$14,850	133.33%	\$19,800	100.00%
69	Communications (e-DUSC, Web, on-line registrations)	\$240	\$2,083	11.52%	\$9,458	\$18,750	50.44%	\$25,000	37.83%
70	Bishop Search Expenditures	\$0	\$4,167	0.00%	\$52,976	\$37,500	141.27%	\$50,000	105.95%
	Support for Holy Orders Process								
71	Seminarian Insurance	\$0	\$1,000	0.00%	\$2,650	\$9,000	29.44%	\$12,000	22.08%
72	Diocesan Curate Support	\$2,500	\$2,500	0.00%	\$22,500	\$22,500	100.00%	\$30,000	75.00%
	Diocesan Prayer Ministry								
73	Order of the Daughters of the King	\$0	\$0.00	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Subtotal - Office of the Bishop	\$93,599	\$112,191.67	83.43%	\$956,911	\$1,009,725	94.77%	\$1,346,300	71.08%
	Bishop's Events:								
74	Clergy Business Day	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
75	Ordinations - Diaconate	\$0	\$83	0.00%	\$465	\$750	62.02%	\$1,000	46.52%
76	Ordinations - Priesthood	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
77	Ordinations - Transitional Diaconate		\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
78	Renewal of Vows	\$0	\$42	0.00%	\$98	\$375	26.25%	\$500	19.68%
79	Celebration of New Ministries	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
	Subtotal - Bishop's Events	\$0	\$458	0.00%	\$564	\$4,125	13.66%	\$5,500	10.25%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Institutions								
80	All Saints', Clinton for facilities use	\$83	\$83.33	100.00%	\$750	\$750	100.00%	\$1,000	75.00%
81	Still Hopes	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
82	Finlay House	\$0	\$42	0.00%	\$500	\$375	133.33%	\$500	100.00%
83	Gravatt	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
84	Univ. of the South School of Theology (Sewanee)	\$0	\$333	0.00%	\$4,000	\$3,000	133.33%	\$4,000	100.00%
85	Voorhees	\$0	\$125	0.00%	\$1,500	\$1,125	133.33%	\$1,500	100.00%
86	Heathwood Hall Episcopal School	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
87	Kanuga	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
	Subtotal - Diocesan Institutions	\$83	\$917	9.09%	\$10,750	\$8,250	130.30%	\$11,000	97.73%
	Diocesan Convention								
88	Diocesan Convention - Leadership & Business Days	\$1,056	\$1,250	84.48%	\$1,056	\$11,250.00	9.39%	\$15,000	7.04%
89	Convention Secretary	\$200	\$200	100.00%	\$1,800	\$1,800	100.00%	\$2,400	75.00%
	Subtotal - Diocesan Convention	\$1,256	\$1,450	184.48%	\$2,856	\$13,050	109.39%	\$17,400	16.41%
	Diocesan Executive Council								
90	Diocesan Executive Council	\$0	\$83	0.00%	\$813	\$750	108.37%	\$1,000	81.28%
91	D.E.C. Orientation & Planning	\$0	\$125	0.00%	\$760	\$1,125	67.56%	\$1,500	50.67%
92	Audit & Accounting Services	\$0	\$1,667	0.00%	\$18,500	\$15,000	123.33%	\$20,000	92.50%
93	Insurance - Property, Liability, Bond	\$307	\$1,250	24.56%	\$17,745	\$11,250	157.73%	\$15,000	118.30%
94	Real Property Expenses	\$0	\$417	0.00%	\$0	\$3,750	0.00%	\$5,000	0.00%
95	NEW - Diocesan Chancellors	\$0	\$250	0.00%	\$225	\$2,250	10.00%	\$3,000	7.50%
	Subtotal - Diocesan Executive Council	\$307	\$3,792	8.10%	\$38,043	\$34,125	111.48%	\$45,500	83.61%
96	Commission on the Diocese	\$146,607	\$187,506	78.19%	\$1,579,036	\$1,687,557	93.57%	\$2,250,076	70.18%
	Comm. on The Episcopal Church & the Anglican Communion								
97	Province IV Pledge	\$0	\$0	#DIV/0!	\$1,980	\$0	#DIV/0!	\$0	#DIV/0!
98	Diocesan Pledge to The Episcopal Church	\$25,114	\$25,114	100.00%	\$226,023	\$226,023	100.00%	\$301,364	75.00%
99	Deputies to General & Synod Convention	(\$2,524)	\$1,250	-201.94%	\$11,250	\$11,250	100.00%	\$15,000	75.00%
100	Lambeth Conference	\$417	\$417	100.00%	\$3,750	\$3,750.00	100.00%	\$5,000	75.00%
101	Ecumenical Relations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
102	Commission on TEC & Anglican Communion	\$23,006	\$26,780	85.91%	\$243,003	\$241,023	100.82%	\$321,364	75.62%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
September 2022

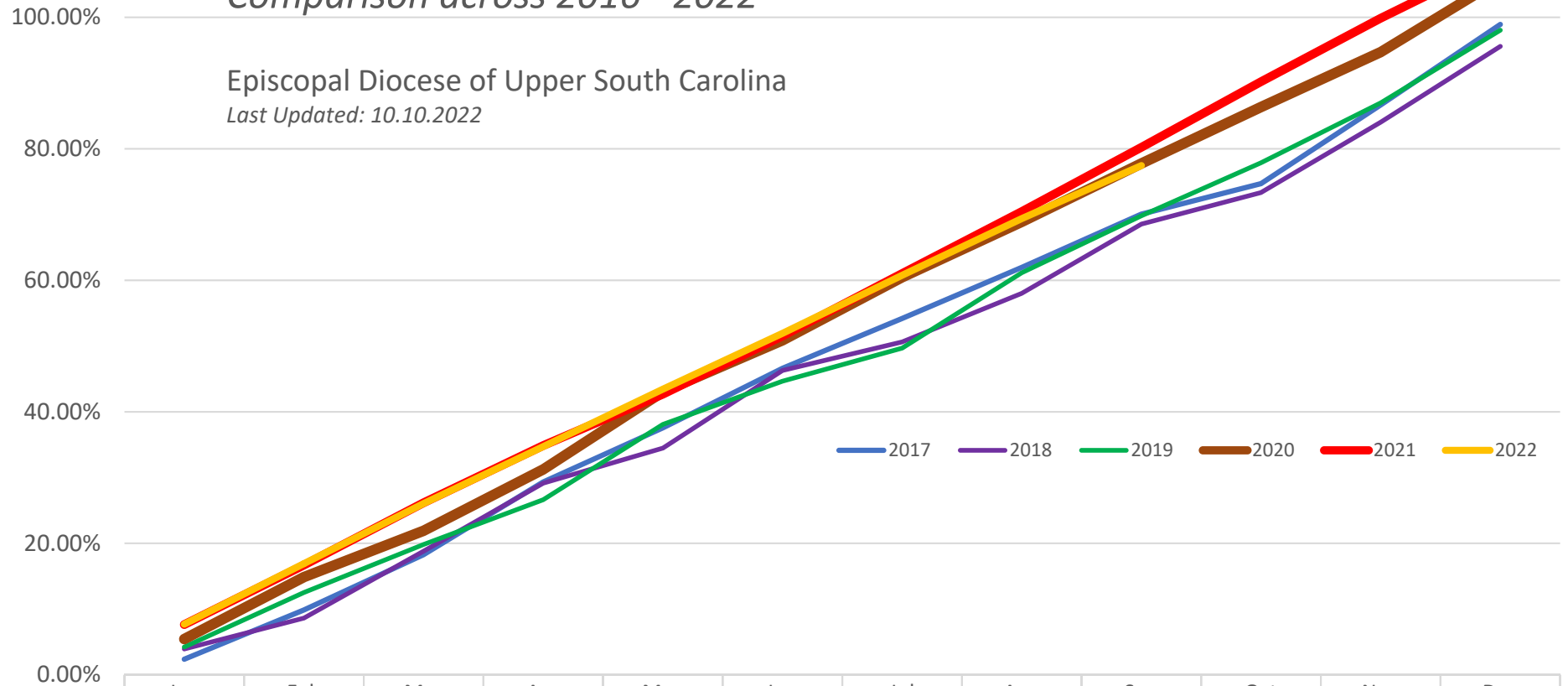
		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
<u>Commission on Mission & International Concerns</u>									
103	Episcopal Relief & Development	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
104	Sustainable Development (Millennium) Goals	\$9,000	\$1,500	0.00%	\$9,000	\$13,500	66.67%	\$18,000	50.00%
105	World Mission Committee - Cange	\$0	\$1,250	0.00%	\$15,786	\$11,250	140.32%	\$15,000	105.24%
106	Ecuador Programs	\$0	\$1,250	0.00%	\$15,000	\$11,250	133.33%	\$15,000	100.00%
107	SC Bishops' Public Education Initiative	\$2,495	\$1,250	199.61%	\$22,529	\$11,250	200.25%	\$15,000	150.19%
108	Camp AIR (Adventures in Reading)	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
109	Matthew 25 Outreach Grants	\$0	\$1,333	0.00%	\$6,000	\$12,000	50.00%	\$16,000	37.50%
110	Racial Reconciliation	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
111	HIV/AIDS Committee	\$0	\$113	0.00%	\$0	\$1,013	0.00%	\$1,350	0.00%
112	Voorhees Scholars Program	\$6,000	\$417	1440.00%	\$6,031	\$3,750	160.82%	\$5,000	120.62%
113	Environmental Stewardship and Justice	\$0	\$125	0.00%	\$0	\$1,125	0.00%	\$1,500	0.00%
114	New - SC Christian Action Council	\$0	\$42	0.00%	\$500	\$375	133.33%	\$500	100.00%
115	Commission on Mission & International Concerns	\$17,495	\$7,571	231.09%	\$74,845	\$68,138	109.84%	\$90,850	82.38%
116	Total Expenses	\$212,932	\$241,241	88.27%	\$2,014,912	\$2,171,168	92.80%	\$2,894,890	69.60%
117	Net (over)/under	\$3,294	\$0		\$87,299	\$0		\$0	

Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2016 - 2022

Episcopal Diocese of Upper South Carolina

Last Updated: 10.10.2022



	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2017	2.37%	9.87%	18.27%	29.33%	37.56%	46.62%	54.20%	61.97%	70.07%	74.70%	86.67%	98.92%
2018	3.93%	8.63%	18.81%	29.15%	34.48%	46.29%	50.63%	58.02%	68.55%	73.35%	84.04%	95.58%
2019	4.24%	12.52%	19.83%	26.63%	38.09%	44.66%	49.69%	61.15%	69.81%	77.88%	86.98%	98.04%
2020	5.44%	14.87%	21.91%	31.24%	43.05%	50.87%	60.47%	68.89%	77.77%	86.35%	94.71%	105.79%
2021	7.65%	16.69%	26.17%	34.87%	42.68%	51.53%	61.04%	70.46%	80.23%	90.21%	99.86%	108.82%
2022	7.70%	16.91%	26.06%	34.72%	43.44%	51.94%	60.77%	69.39%	77.45%			

**Investment Market Values
September 30, 2022
3Q2022**

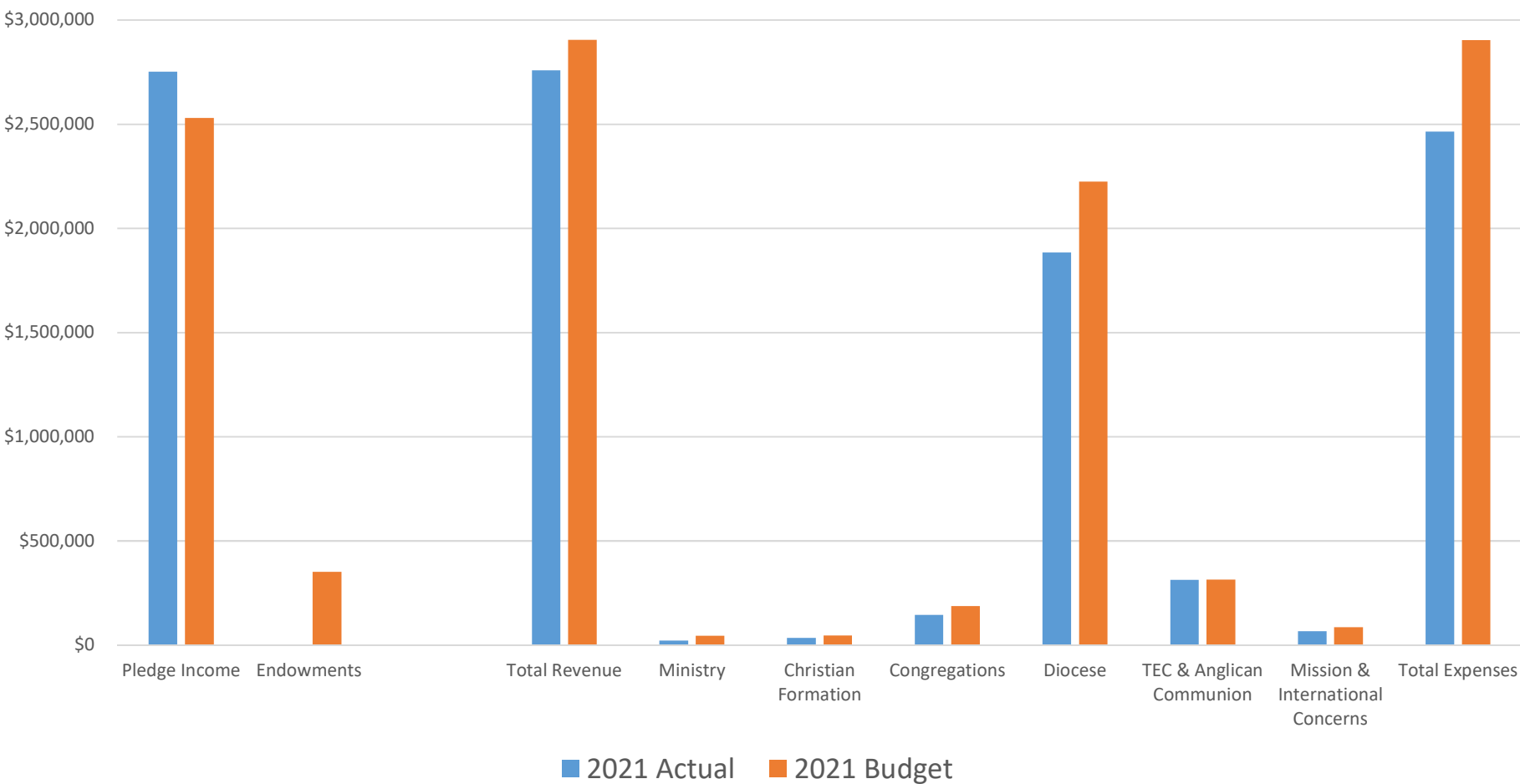
**The Episcopal Diocese
of Upper South Carolina**

Fund	Investment	Unrestricted	Temp.Restr.	Perm.Restr.	Total	12/31/2021	%
#	Fund Name	Market Value	Market Value	Market Value	Market Value	Market Value	Change
1001	Bachman		\$169,155.60	\$0.00	\$169,155.60	\$212,062.84	(20.23%)
1002	Baker		\$15,735.91	\$5,000.00	\$20,735.91	\$26,121.48	(20.62%)
1003	Calvary/Glenn Springs		\$208,873.87	\$42,532.90	\$251,406.77	\$316,702.74	(20.62%)
1004	Sophie Carroll		\$6,483.69	\$500.00	\$6,983.69	\$8,797.51	(20.62%)
1005	Annie Cates		\$5,719.47	\$1,176.00	\$6,895.47	\$8,686.38	(20.62%)
1006	Honorio Cates		\$17,493.63	\$1,250.00	\$18,743.63	\$23,611.76	(20.62%)
1007	Hart		\$16,251.82	\$1,000.00	\$17,251.82	\$21,732.51	(20.62%)
1008	Eliz. La Borde		\$3,238.98	\$250.00	\$3,488.98	\$4,395.15	(20.62%)
1009	Richard Manning		\$130,228.37	\$10,000.00	\$140,228.37	\$176,648.82	(20.62%)
1010	Prayer Bk/Tract Society		\$36,853.93	\$2,174.56	\$39,028.49	\$49,165.06	(20.62%)
1011	Shuler		\$14,918.36	\$1,150.00	\$16,068.36	\$20,241.67	(20.62%)
1012	Anna Still		\$2,332.87	\$6,000.00	\$8,332.87	\$10,497.10	(20.62%)
1013	Sulbacher		\$6,159.63	\$650.00	\$6,809.63	\$8,578.25	(20.62%)
1014	Turnbull Trust		\$32,564.49	\$15,000.00	\$47,564.49	\$59,918.07	(20.62%)
1015	Corrie Zimmerman		\$7,149.07	\$1,000.00	\$8,149.07	\$10,265.56	(20.62%)
1016	Mary Zimmerman		\$5,569.02	\$1,000.00	\$6,569.02	\$8,275.15	(20.62%)
1017	Zimmerman / Squires		\$15,955.99	\$3,000.00	\$18,955.99	\$23,879.29	(20.62%)
2001	Bp's Permanent Fund		\$283,591.45	\$29,174.11	\$312,765.56	\$421,707.81	(25.83%)
2002	Trustees' General	\$526,489.63	\$0.00	\$0.00	\$526,489.63	\$660,036.62	(20.23%)
2003	Operation Reserve	\$79,770.20	\$0.00	\$0.00	\$79,770.20	\$268,899.71	(70.33%)
2004	Collett Memorial		\$111,056.59	\$0.00	\$111,056.59	\$139,900.48	(20.62%)
2005	Beattie Foundation		\$61,463.04	\$13,845.01	\$75,308.05	\$94,867.23	(20.62%)
2006	Cont. Ed. for Clergy		\$21,588.35	\$6,154.99	\$27,743.34	\$34,948.92	(20.62%)
2007	De Hon Bowen		\$68,630.27	\$4,800.00	\$73,430.27	\$92,501.75	(20.62%)
2008	Pringle Frost		\$21,326.35	\$1,800.00	\$23,126.35	\$29,132.79	(20.62%)
2009	Theological Ed.		\$164,372.14	\$5,050.00	\$169,422.14	\$213,424.86	(20.62%)
2010	Addie Tingley		\$117,276.91	\$35,126.87	\$152,403.78	\$191,986.47	(20.62%)
2011	Martha Williams		\$164,709.56	\$25,000.00	\$189,709.56	\$238,981.39	(20.62%)
2012	Henry B. Richardson		\$195,136.81	\$75,000.00	\$270,136.81	\$338,658.50	(20.23%)
2014	Winthrop College		\$7,097.19	\$1,000.00	\$8,097.19	\$10,151.09	(20.23%)
2015	Bagwell Trust		\$16,685.07	\$0.00	\$16,685.07	\$20,917.33	(20.23%)
2016	Partnership Cange		\$783,419.20	\$0.00	\$783,419.20	\$970,583.09	(19.28%)
2018	Walker Memorial		\$17,166.67	\$13,186.57	\$30,353.24	\$38,052.51	(20.23%)
2025	Proceeds from Canterbury-Winthrop sale	\$121,937.76	\$0.00	\$0.00	\$121,937.76	\$152,867.94	(20.23%)
2027	Proceeds from Union County property sale		\$236,464.15	\$0.00	\$236,464.15	\$297,879.18	(20.62%)
2031	Campus Ministry Initiative Fund		\$271,718.96		\$271,718.96	\$349,887.10	(22.34%)
3001	Zion Eastover	\$6,607.97	\$2,913.80	\$2,000.00	\$11,521.77	\$14,444.33	(20.23%)
<i>Bishop's Legacy Fund:</i>							
2024+							
2028	Healthy Church Foundation	\$126,313.72	\$0.00	\$0.00	\$126,313.72	\$158,353.88	(20.23%)
2019	Thompson Fund	\$119,125.60	\$0.00	\$0.00	\$119,125.60	\$149,342.46	(20.23%)
2021	Shafto Fund	\$49,344.64	\$84,577.21	\$0.00	\$133,921.85	\$167,891.86	(20.23%)
2013	Clippard/New Miss'ns		\$270,978.69	\$0.00	\$270,978.69	\$339,713.92	(20.23%)
2023	Proceeds from All Souls' sale	\$199,603.36	\$0.00	\$0.00	\$199,603.36	\$250,233.85	(20.23%)
2029	Proceeds from Clearwater sale	\$56,357.45	\$0.00	\$0.00	\$56,357.45	\$70,652.83	(20.23%)
2030	Proceeds from St. Matthias sale	\$273,209.20	\$0.00	\$0.00	\$273,209.20	\$993,876.36	(72.51%)
GROSS TOTAL MARKET VALUE		\$1,558,759.53	\$3,594,857.11	\$303,821.01	\$5,457,437.65	\$7,699,473.60	(29.12%)
		1st Quarter	2nd Quarter	3rd Quarter		Annual Totals	
Deposits		\$26,003.50	\$871.50	\$21,415.00		\$48,290.00	
		\$5,491 - Church Funds	\$609.00 - Church Funds	\$1,355.00 - Church Funds			
Withdraws		\$88,159.44	\$650,000.00	\$18,000.00		\$756,159.44	
		\$4,500 - Church Funds	\$0 - Church Funds	\$7,000 - Church Funds			
NET TOTAL MARKET VALUE							
15 Church/Institution Funds					3,780,307.00	\$3,942,429.56	(4.11%)
Grand Total Market Value 9/30/2022:					\$9,237,744.65	\$9,761,095.69	(5.37%)

Overview of 2021 Actual Expenditures Compared to 2021 SOM

		2021 Actual	2021 Budget	% of Budget
	<u>Diocesan Resources (Income)</u>			
3	Episcopal Pledge Income (16%)	\$2,752,535	\$2,529,465	108.82%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$351,014	0.00%
9	Total Revenue	\$2,758,961	\$2,905,479	94.96%
	<u>Expenses:</u>			
26	Commission on Ministry	\$21,625	\$44,000	49.15%
35	Commission on Christian Formation	\$34,163	\$45,850	74.51%
52	Commission on Congregations	\$144,697	\$188,248	76.87%
101	Commission on the Diocese	\$1,883,663	\$2,223,626	84.71%
107	Commission on TEC & Anglican Communion	\$312,907	\$315,019	99.33%
119	Commission on Mission & International Concerns	\$67,092	\$86,500	77.563%
120	Total Expenses	\$2,464,146	\$2,903,243	84.88%
121	Net (Deficit) / Surplus	\$294,815	\$2,236	

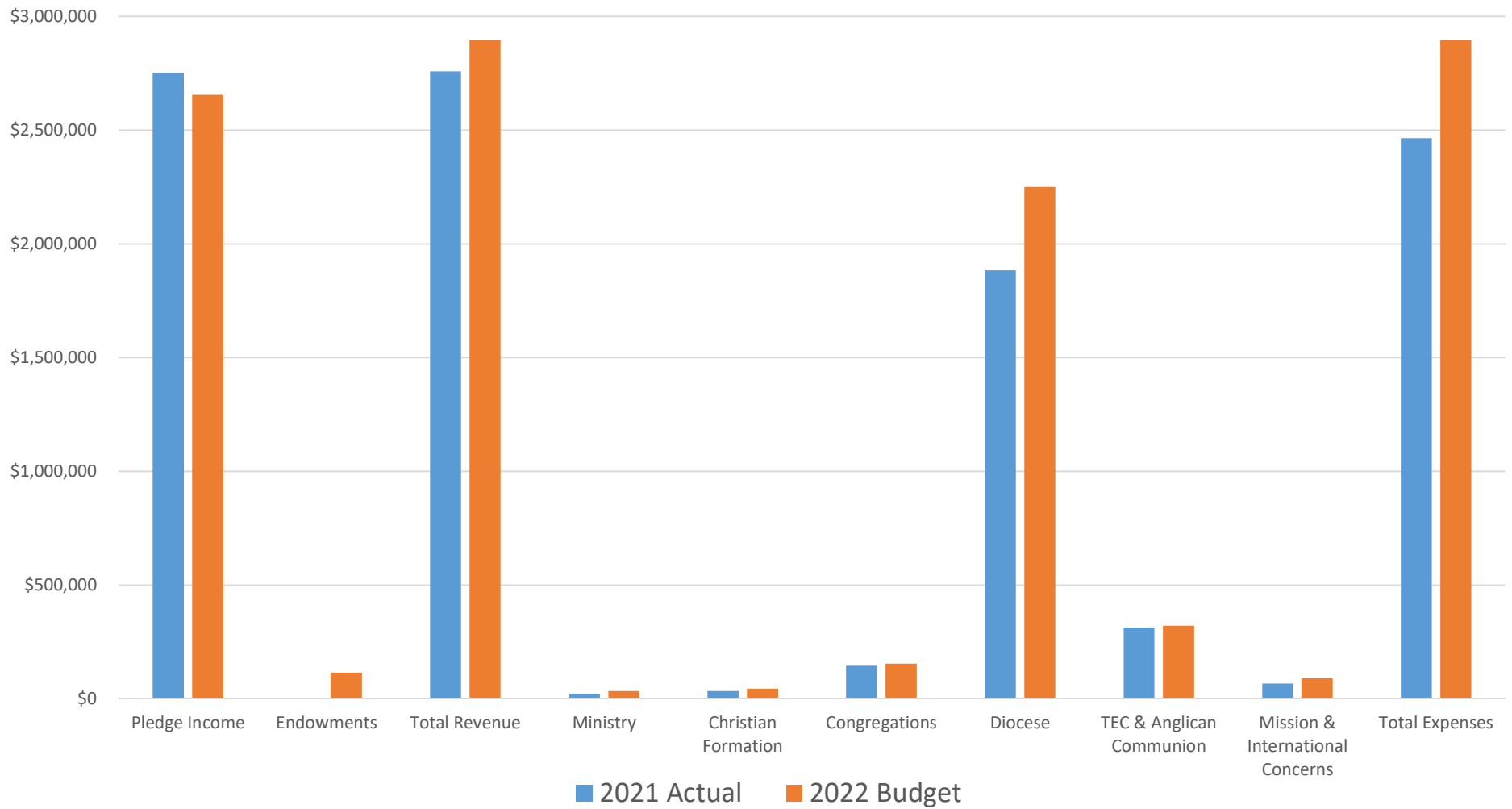
Overview of 2021 Actual Expenditures
Compared to 2021 SOM



Overview of 2021 Actual Expenditures Compared to 2022 SOM

		2021 Actual	Actual / Actual Total	2022 Budget	Budget / Budget Total
	<u>Diocesan Resources (Income)</u>				
	Episcopal Pledge Income (16%)	\$2,752,535	99.77%	\$2,655,000	91.71%
	Support for Theological Ed. (Endowment)	\$5,495	0.20%	\$8,400	0.29%
	Continuing Ed. for Clergy (Endowment)	\$931	0.03%	\$1,400	0.05%
	Withdrawals from Diocesan Endowment Portfolio	\$0	0.00%	\$115,090	3.98%
	30% Surplus from 2021 (2022)	\$0	0.00%	\$75,000	2.59%
	Episcopal Diocese Grant (2022)	\$0	0.00%	\$40,000	1.38%
	Emergency Congregational Support (2021)	\$0	0.00%	\$0	0.00%
	Total Revenue	\$2,758,961		\$2,894,890	
	<u>Expenses:</u>				
	Commission on Ministry	\$21,625	0.78%	\$34,000	1.17%
	Commission on Christian Formation	\$34,163	1.24%	\$44,400	1.53%
	Commission on Congregations	\$144,697	5.24%	\$154,200	5.33%
	Commission on the Diocese	\$1,883,663	68.27%	\$2,250,076	77.73%
	Commission on TEC & Anglican Communion	\$312,907	11.34%	\$321,364	11.10%
	Commission on Mission & International Concerns	\$67,092	2.43%	\$90,850	3.14%
	Total Expenses	\$2,464,146		\$2,894,890	
	Net (Deficit) / Surplus	\$294,815	10.69%	\$0	0.00%

Overview of 2021 Actual Compared to 2022 SOM



September 2022 SOM Summary Report

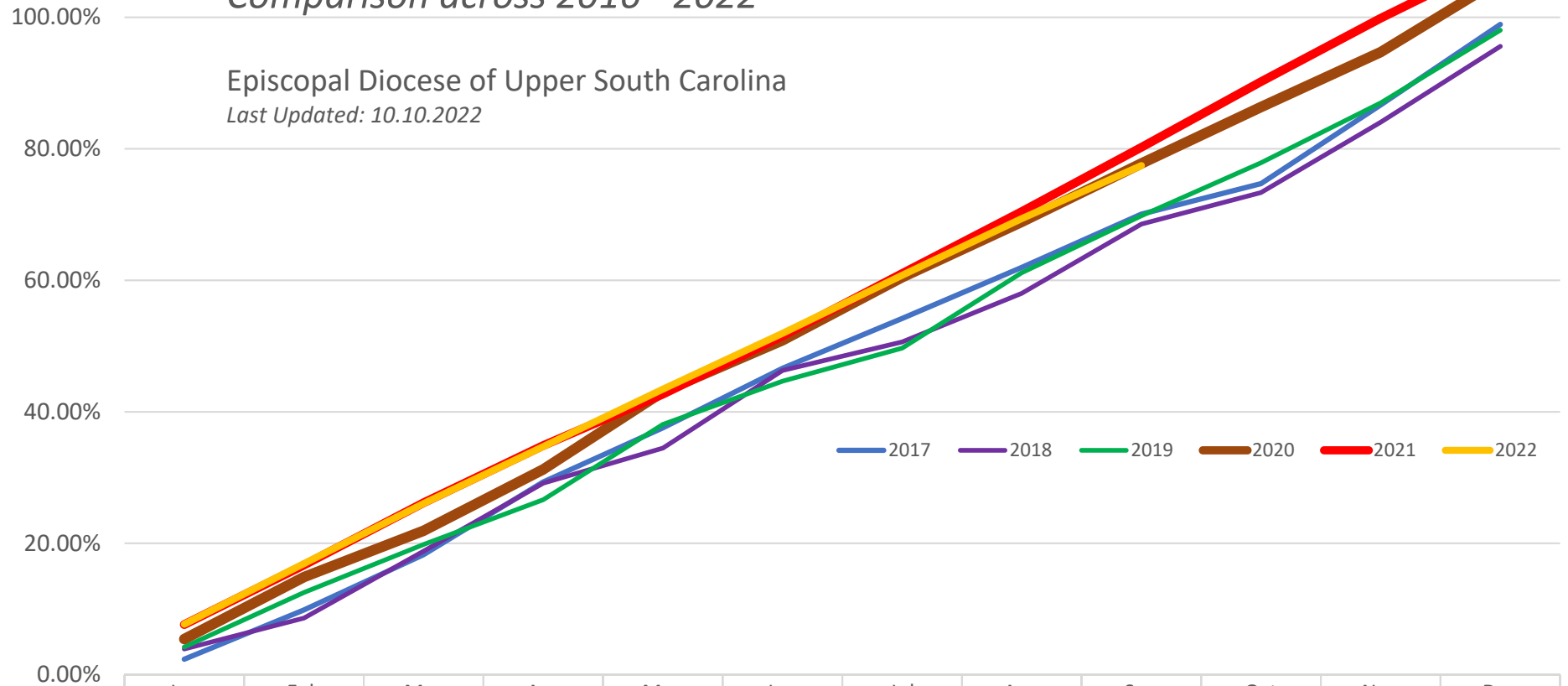
		September	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Diocesan Resources (Income)</u>							
3	Episcopal Pledge Income (16%)	\$214,212	\$221,250	\$2,056,412	\$1,991,250.00	103.27%	\$2,655,000	77.45%
	Prior Year Pledge Income	\$0	\$0	\$2,242	\$0	0.00%	\$0	0.00%
4	Support for Theological Ed. (Endowment)	\$1,723	\$700	\$3,042	\$6,300	48.29%	\$8,400	36.22%
5	Continuing Ed. for Clergy (Endowment)	\$292	\$116.67	\$516	\$1,050	49.10%	\$1,400	36.83%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$9,591	\$0	\$86,318	0.00%	\$115,090	0.00%
7	30% Surplus from 2021	\$0	\$6,250	\$0	\$56,250	0.00%	\$75,000	0.00%
8	Episcopal Diocese Grant	\$0	\$3,333	\$40,000	\$30,000	133.33%	\$40,000	100.00%
9	Emergency Congregational Support	\$0	\$0	\$0	\$0	0.00%	\$0	0.00%
10	Total Revenue	\$216,226	\$241,241	\$2,102,211	\$2,171,168	96.82%	\$2,894,890	72.62%
	<u>Diocesan Expenses</u>							
26	Commission on Ministry	\$15,475	\$2,833	\$6,384	\$25,500	25.03%	\$34,000	18.78%
35	Commission on Christian Formation	(\$34)	\$3,700	\$12,144	\$33,300	36.47%	\$44,400	27.35%
50	Commission on Congregations	\$10,383	\$12,850	\$99,500	\$115,650	86.04%	\$154,200	64.53%
96	Commission on the Diocese	\$146,607	\$187,506	\$1,579,036	\$1,687,557	93.57%	\$2,250,076	70.18%
102	Commission on TEC & Anglican Communion	\$23,006	\$26,780	\$243,003	\$241,023	100.82%	\$321,364	75.62%
115	Commission on Mission & International Concerns	\$17,495	\$7,571	\$74,845	\$68,138	109.84%	\$90,850	82.38%
116	Total Expenses	\$212,932	\$241,241	\$2,014,912	\$2,171,168	92.80%	\$2,894,890	69.60%
117	Net (Deficit) / Surplus	\$3,294	\$0	\$87,299	\$0		\$0	

Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2016 - 2022

Episcopal Diocese of Upper South Carolina

Last Updated: 10.10.2022



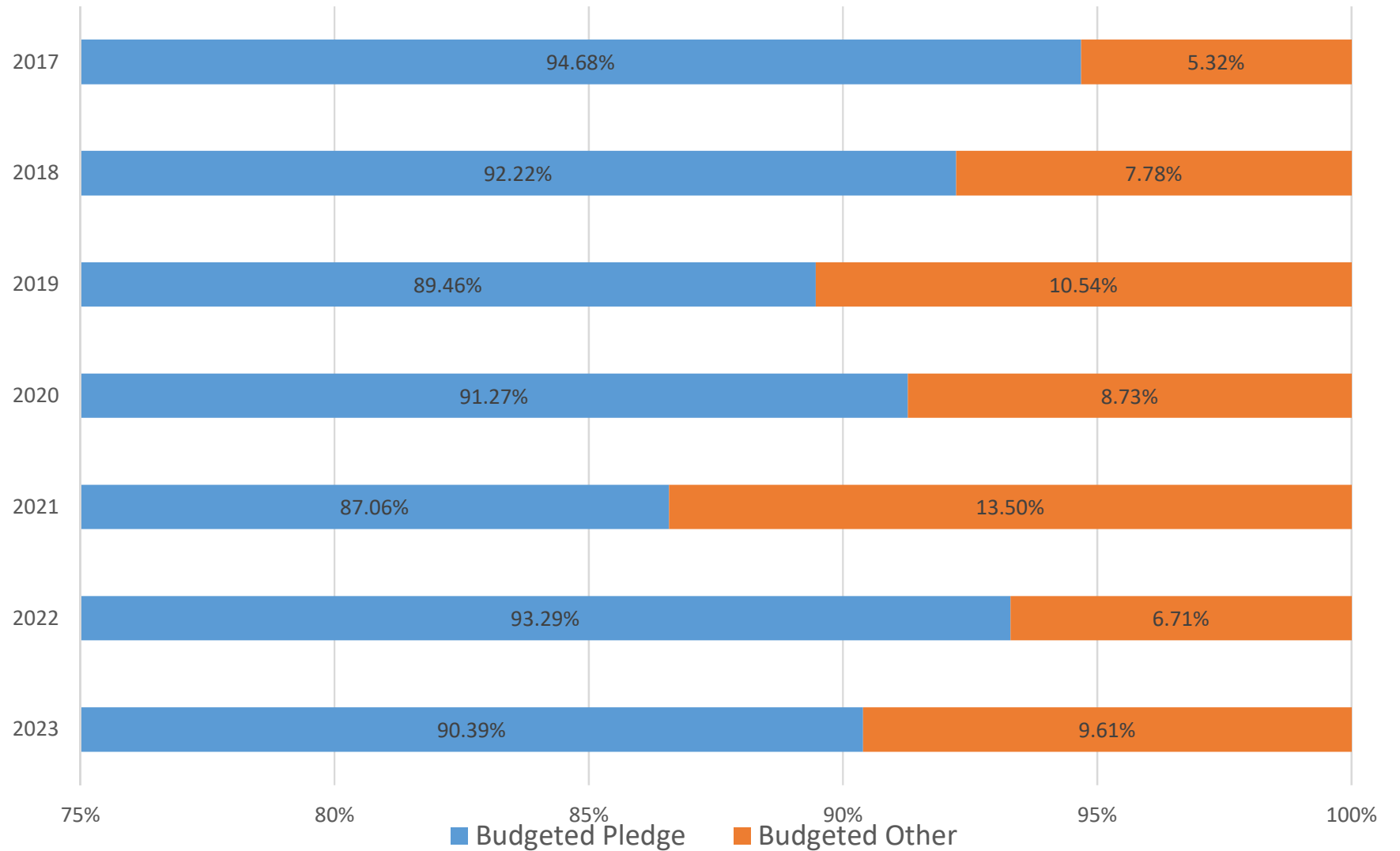
	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2017	2.37%	9.87%	18.27%	29.33%	37.56%	46.62%	54.20%	61.97%	70.07%	74.70%	86.67%	98.92%
2018	3.93%	8.63%	18.81%	29.15%	34.48%	46.29%	50.63%	58.02%	68.55%	73.35%	84.04%	95.58%
2019	4.24%	12.52%	19.83%	26.63%	38.09%	44.66%	49.69%	61.15%	69.81%	77.88%	86.98%	98.04%
2020	5.44%	14.87%	21.91%	31.24%	43.05%	50.87%	60.47%	68.89%	77.77%	86.35%	94.71%	105.79%
2021	7.65%	16.69%	26.17%	34.87%	42.68%	51.53%	61.04%	70.46%	80.23%	90.21%	99.86%	108.82%
2022	7.70%	16.91%	26.06%	34.72%	43.44%	51.94%	60.77%	69.39%	77.45%			

	<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022	Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
	DIOCESAN RESOURCES				
1	Episcopal Pledge Assessments		\$3,527,433	\$3,360,000	(\$167,433)
2	Less: Allowance for Unaccepted Pledge Assessments		(\$872,433)	(\$560,000)	\$312,433
3	Episcopal Pledge Income		\$2,655,000	\$2,800,000	\$145,000
4	Support for Theological Ed. (Endowment)		\$8,400	\$5,500	(\$2,900)
5	Continuing Ed. for Clergy (Endowment)		\$1,400	\$930	(\$470)
6	Transfer from Diocesan Endowment Portfolio		\$115,090	\$155,269.50	\$40,180
7	Transfer of 30% of 2022 projected surplus		\$75,000	\$88,000	\$13,000
8	Episcopal Diocese Grant (Only for 2022)		\$40,000	\$0	(\$40,000)
9	Transfer from Canterbury Funds for Young Adult Ministry		\$0	\$47,900	\$47,900
10	Total Resources		\$2,894,890	\$3,097,599.5	\$202,710
	DIOCESAN EXPENSES				
26	Commission on Ministry		\$34,000	\$57,050	\$23,050
35	Commission on Christian Formation		\$44,400	\$109,104	\$64,704
50	Commission for Congregations		\$154,200	\$176,200	\$22,000
51	Commission on Convocations		\$0	\$0	\$0
97	Commission on the Diocese		\$2,250,076	\$2,334,779	\$84,703
103	Comm. on The Episcopal Church & The Anglican Communion		\$321,364	\$327,566	\$6,202
116	Commission on Mission & International Concerns		\$90,850	\$92,900	\$2,050
118	Total Expenses		\$2,894,890	\$3,097,599	\$202,709
119	Net (Deficit) / Surplus		\$0	\$0	\$0

Pledge Income to Total Resources Budgeted and Expended

	Budgeted Pledge	Budgeted Other	Total Budgeted	Actual Pledge	Actual Other	Total Actual
2023	90.39%	9.61%	\$ 3,097,600			
2022	93.29%	6.71%	\$ 2,845,890			
2021	87.06%	13.50%	\$ 2,905,479	99.77%	0.23%	\$ 2,758,961
2020	91.27%	8.73%	\$ 2,870,508	99.64%	0.36%	\$ 2,781,559
2019	89.46%	10.54%	\$ 3,052,294	96.71%	4.66%	\$ 2,808,137
2018	92.22%	7.78%	\$ 2,954,835	99.32%	0.68%	\$ 2,622,326
2017	94.68%	5.32%	\$ 2,799,130	99.65%	0.35%	\$ 2,630,819

Pledge Income to Total Income 2017 - 2023



EDUSC Congregational Health Report
Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2017-2021

Church Name	Church City		Composite Congregational Health	5 Year Averages				
				Pledge Lower Option	Acceptances/ Lower Option	Payments/ Acceptances	Unaccepted Pledge Per Year	Average Health
Trinity Episcopal Church	Abbeville	Mission	86%	Pledge	\$ 9,059	98%	274%	\$ 224 98%
				Audit				60%
				Parochial				100%
St Augustine of Canterbury	Aiken	Mission	87%	Pledge	\$ 26,021	100%	104%	\$ (2) 100%
				Audit				60%
				Parochial				100%
St Thaddeus Episcopal Church	Aiken	Parish	96%	Pledge	\$ 114,127	89%	95%	\$ 12,525 89%
				Audit				100%
				Parochial				100%
Grace Episcopal Church	Anderson	Parish	100%	Pledge	\$ 57,114	100%	100%	\$ (0) 100%
				Audit				100%
				Parochial				100%
St George Episcopal Church	Anderson	Parish	100%	Pledge	\$ 9,753	100%	100%	\$ 0 100%
				Audit				100%
				Parochial				100%
All Saints Episcopal Church	Beech Island	Mission	59%	Pledge	\$ 5,238	97%	100%	\$ 158 97%
				Audit				0%
				Parochial				80%
St Margarets Episcopal Church	Boiling Springs	Parish	69%	Pledge	\$ 18,855	28%	80%	\$ 13,524 28%
				Audit				80%
				Parochial				100%
Grace Episcopal Church	Camden	Parish	71%	Pledge	\$ 57,974	53%	175%	\$ 27,377 53%
				Audit				60%
				Parochial				100%
All Saints Episcopal Church	Cayce	Parish	88%	Pledge	\$ 18,470	64%	95%	\$ 6,675 64%
				Audit				100%
				Parochial				100%
St Francis of Assisi	Chapin	Parish	87%	Pledge	\$ 40,760	100%	100%	\$ 0 100%
				Audit				80%
				Parochial				80%
St Marks Episcopal Church	Chester	Mission	52%	Pledge	\$ 5,338	77%	80%	\$ 1,227 77%
				Audit				20%
				Parochial				60%
Holy Trinity Episcopal Parish	Clemson	Parish	94%	Pledge	\$ 83,803	101%	100%	\$ (822) 101%
				Audit				80%
				Parochial				100%
All Saints Episcopal Church	Clinton	Parish	81%	Pledge	\$ 23,354	102%	100%	\$ (568) 102%
				Audit				40%
				Parochial				100%
Church of the Cross	Columbia	Mission	69%	Pledge	\$ 9,555	107%	85%	\$ (684) 107%
				Audit				20%
				Parochial				80%
Church of the Good Shepherd	Columbia	Parish	88%	Pledge	\$ 68,461	64%	100%	\$ 24,734 64%
				Audit				100%
				Parochial				100%

EDUSC Congregational Health Report
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St Davids Episcopal Church	Columbia	Parish	80%	Pledge	\$ 56,800	101%	100%	\$ (428)	101%
				Audit					40%
				Parochial					100%
St Johns Episcopal Church	Columbia	Parish	100%	Pledge	\$ 147,576	100%	100%	\$ 0	100%
				Audit					100%
				Parochial					100%
St Lukes Episcopal Church	Columbia	Parish	93%	Pledge	\$ 34,124	98%	102%	\$ 701	98%
				Audit					80%
				Parochial					100%
St Martins in the Fields	Columbia	Parish	81%	Pledge	\$ 142,541	104%	100%	\$ (5,699)	104%
				Audit					40%
				Parochial					100%
St Marys Episcopal Church	Columbia	Parish	69%	Pledge	\$ 69,762	48%	100%	\$ 36,462	48%
				Audit					60%
				Parochial					100%
St Michael and All Angels	Columbia	Mission	84%	Pledge	\$ 53,660	52%	100%	\$ 25,809	52%
				Audit					100%
				Parochial					100%
St Timothys Episcopal Church	Columbia	Parish	92%	Pledge	\$ 21,702	76%	100%	\$ 5,114	76%
				Audit					100%
				Parochial					100%
Trinity Cathedral Church	Columbia	Parish	75%	Pledge	\$ 475,975	86%	100%	\$ 65,600	86%
				Audit					40%
				Parochial					100%
St Michaels Episcopal Church	Easley	Parish	76%	Pledge	\$ 35,168	68%	101%	\$ 11,370	68%
				Audit					60%
				Parochial					100%
St Thomas Church	Eastover	Mission	41%	Pledge	\$ 3,773	102%	90%	\$ (76)	102%
				Audit					0%
				Parochial					20%
St Pauls Episcopal Church	Fort Mill	Parish	88%	Pledge	\$ 33,704	65%	100%	\$ 11,870	65%
				Audit					100%
				Parochial					100%
Episcopal Church of the Incarnatio	Gaffney	Parish	54%	Pledge	\$ 22,237	22%	100%	\$ 17,427	22%
				Audit					40%
				Parochial					100%
Calvary Episcopal Church	Glenn Springs	Mission	59%	Pledge	\$ 6,990	76%	97%	\$ 1,643	76%
				Audit					0%
				Parochial					100%
St Pauls Episcopal Church	Graniteville	Parish	46%	Pledge	\$ 8,382	18%	76%	\$ 6,913	18%
				Audit					20%
				Parochial					100%
St Peters Episcopal Church	Great Falls	Mission	93%	Pledge	\$ 3,375	100%	100%	\$ (0)	100%
				Audit					80%
				Parochial					100%
Christ Episcopal Church	Greenville	Parish	69%	Pledge	\$ 447,493	67%	102%	\$ 146,167	67%
				Audit					40%
				Parochial					100%
Church of the Redeemer	Greenville	Parish	90%	Pledge	\$ 42,591	89%	100%	\$ 4,620	89%
				Audit					80%
				Parochial					100%

EDUSC Congregational Health Report

Data Breakdown

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St Andrews Episcopal Church	Greenville	Parish	90%	Pledge	\$ 32,728	69%	100%	\$ 10,180	69%
				Audit					100%
				Parochial					100%
St Francis Episcopal Church	Greenville	Parish	36%	Pledge	\$ 6,203	9%	20%	\$ 5,615	9%
				Audit					0%
				Parochial					100%
St James Episcopal Church	Greenville	Parish	72%	Pledge	\$ 93,745	75%	100%	\$ 23,420	75%
				Audit					60%
				Parochial					80%
St Peters Episcopal Church	Greenville	Parish	100%	Pledge	\$ 88,987	100%	100%	\$ 0	100%
				Audit					100%
				Parochial					100%
St Philips Church	Greenville	Mission	80%	Pledge	\$ 8,259	101%	100%	\$ (119)	101%
				Audit					40%
				Parochial					100%
Church of the Resurrection	Greenwood	Parish	100%	Pledge	\$ 62,026	100%	100%	\$ (0)	100%
				Audit					100%
				Parochial					100%
Church of the Good Shepherd	Greer	Parish	93%	Pledge	\$ 20,841	100%	100%	\$ (7)	100%
				Audit					80%
				Parochial					100%
St Johns Episcopal Church	Hopkins	Parish	96%	Pledge	\$ 21,583	88%	100%	\$ 2,659	88%
				Audit					100%
				Parochial					100%
Epis Ch of St Simon & St Jude	Irmo	Parish	80%	Pledge	\$ 37,989	81%	107%	\$ 7,154	81%
				Audit					60%
				Parochial					100%
St Barnabas Episcopal Church	Jenkinsville	Mission	101%	Pledge	\$ 6,090	102%	100%	\$ (93)	102%
				Audit					100%
				Parochial					100%
Christ Episcopal Church	Lancaster	Parish	68%	Pledge	\$ 19,715	4%	57%	\$ 18,832	4%
				Audit					100%
				Parochial					100%
Church of the Epiphany	Laurens	Parish	41%	Pledge	\$ 11,688	43%	85%	\$ 6,650	43%
				Audit					0%
				Parochial					80%
St Albans Episcopal Church	Lexington	Parish	100%	Pledge	\$ 38,069	100%	100%	\$ 0	100%
				Audit					100%
				Parochial					100%
St Lukes Episcopal Church	Newberry	Mission	49%	Pledge	\$ 12,567	27%	100%	\$ 9,226	27%
				Audit					40%
				Parochial					80%
St Bartholomews Episcopal Church	North Augusta	Mission	78%	Pledge	\$ 56,491	53%	86%	\$ 26,441	53%
				Audit					80%
				Parochial					100%
St Stephens Episcopal Church	Ridgeway	Mission	87%	Pledge	\$ 13,572	101%	100%	\$ (139)	101%
				Audit					100%
				Parochial					60%
Episcopal Church of Our Saviour	Rock Hill	Parish	83%	Pledge	\$ 64,227	70%	100%	\$ 19,541	70%
				Audit					80%
				Parochial					100%

EDUSC Congregational Health Report

Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2017-2021

Church of the Ascension	Seneca	Parish	60%	Pledge	\$ 22,328	40%	74%	\$ 13,413	40%
				Audit					40%
				Parochial					100%
Holy Cross Episcopal Church	Simpsonville	Parish	77%	Pledge	\$ 80,716	71%	75%	\$ 23,689	71%
				Audit					60%
				Parochial					100%
Episcopal Church of the Advent	Spartanburg	Parish	77%	Pledge	\$ 297,992	90%	100%	\$ 29,385	90%
				Audit					40%
				Parochial					100%
Episcopal Church of the Epiphany	Spartanburg	Mission	53%	Pledge	\$ 6,682	59%	280%	\$ 2,746	59%
				Audit					0%
				Parochial					100%
St Christophers Church Episcopal	Spartanburg	Mission	77%	Pledge	\$ 35,089	30%	102%	\$ 24,419	30%
				Audit					100%
				Parochial					100%
St Matthews Episcopal Church	Spartanburg	Parish	87%	Pledge	\$ 62,449	100%	97%	\$ (0)	100%
				Audit					60%
				Parochial					100%
Episcopal Church of the Ridge	Trenton	Mission	93%	Pledge	\$ 22,580	100%	100%	\$ (19)	100%
				Audit					80%
				Parochial					100%
Church of the Nativity	Union	Mission	46%	Pledge	\$ 8,055	57%	100%	\$ 3,445	57%
				Audit					0%
				Parochial					80%
St Johns Episcopal Church	Winnsboro	Parish	80%	Pledge	\$ 8,682	100%	100%	\$ 0	100%
				Audit					40%
				Parochial					100%
Church of the Good Shepherd	York	Parish	100%	Pledge	\$ 28,066	100%	98%	\$ 0	100%
				Audit					100%
				Parochial					100%

Pledge Acceptance Total	\$ 3,321,155	81%	\$ 638,298	Unaccepted Pledge Total
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PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina TRINITY CATHEDRAL PARISH COLUMBIA, SOUTH CAROLINA NOVEMBER 11-12, 2022

Please return completed forms on or before September 11, 2022

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as “special” resolutions which are subject to being accepted by the Convention before being considered.

Completed forms may be submitted via:

Fax: 803-799-5119

Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimbball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

Date: August 4, 2022

Offered by The Standing Committee of the Episcopal Diocese of Upper South Carolina

Whereas, the deadline for submitting resolutions for consideration at the 99th Diocesan Convention of the Episcopal Diocese of Upper South Carolina (the “Diocese”) (the “99th Convention”) was September 6, 2021; and

Whereas, the circumstances giving rise to the resolution proposed below (the “Resolution”) arose in connection with the Special Convention to Elect the Ninth Bishop of the Diocese on September 25, 2021, subsequent to the foregoing deadline; and

Whereas, the Resolution was submitted on October 29, 2021 to the Secretary of the 99th Convention by the Committee on Credentials for the Special Convention to Elect the Ninth Bishop of the Diocese (the “Credentials Committee”), and stated that it was intended to be submitted on the floor of the 99th Convention by the Credentials Committee and to be voted on by the 99th Convention; and

Whereas, the business session of the 99th Convention was abbreviated, and there was no opportunity for the Credentials Committee to present the Resolution from the floor; and

Whereas, recognizing the importance of the Resolution, at its meeting on December 11, 2021, the Standing Committee of the Diocese, acting as the interim legislative authority of Convention, adopted the Resolution on behalf of the 99th Convention; and

Whereas, the Standing Committee requests that the 100th Convention of the Episcopal Diocese of Upper South Carolina (the “100th Convention”) ratify the Standing Committee’s adoption of the Resolution on behalf of the 99th Convention, and that the 100th Convention adopt the Resolution as its own.

NOW, THEREFORE, BE IT RESOLVED, that the 100th Convention hereby ratifies the Standing Committee’s adoption of the Resolution on behalf of the 99th Convention; and, further,

RESOLVED, that the 100th Convention hereby adopts the Resolution on the premises set forth below:

Subject: Honoring and thanking retired clergy of the Episcopal Diocese of Upper South Carolina who attended the Special Convention to Elect the Ninth Bishop of the Diocese

Whereas, the Episcopal Diocese of Upper South Carolina craves the wise counsel and spiritual guidance of our retired clergy, who, over their time of active service, helped nurture and mold our diocesan life; and

Whereas, as a reflection of this sentiment, the Committee on Constitution and Canons very deliberately proposed and the 95th Diocesan Convention in 2017 agreed that retired clergy should continue to be included in the quorum requirement for the deliberations and ultimate decision about the most important event in the life of our Diocese, the calling of our bishop; and

Whereas, we recognize that this requirement places a particularly high burden on retired clergy, some of whom have health and mobility challenges, some of whom no longer reside in South Carolina, and all of whom are deserving of the opportunity to enjoy their well-earned retirement; and

Whereas, this year's Special Convention to Elect the 9th Bishop of the Episcopal Diocese of Upper South Carolina was held in the midst of a once-in-a-century global pandemic that has taken its heaviest toll on our senior citizens, such that even our retired clergy who are fully vaccinated are at significantly increased risk of serious complications or death if they contract COVID-19; and

Whereas, despite extensive public-health precautions taken for the convention, the risk of an airborne infection can never be reduced to zero when 285 people gather in an enclosed space; and

Whereas, our quorum requirement meant that even if all 80 non-retired clergy were in attendance, it was still necessary for at least 24 of our retired clergy to participate in order to achieve a quorum; and

And whereas, 28 of our retired clergy participated in the Special Convention, an excellent turnout even in the absence of a pandemic.

Now, therefore, be it resolved that the clergy and laity of the 99th Convention of the Episcopal Diocese of Upper South Carolina express their profound gratitude, thanks and appreciation to the 28 retired clergy of the Diocese who, notwithstanding understandable concerns for their health and the difficulty of participating, nonetheless attended the Special Convention to Elect the Ninth Bishop of the Diocese of Upper South Carolina on September 25, 2021.

As adopted by the Standing Committee on behalf of the 99th Convention, December 11, 2021.

ADOPTION OF THE RESOLUTION BY THE 100TH CONVENTION:

Now, therefore, be it resolved that the clergy and laity of the 100th Convention of the Episcopal Diocese of Upper South Carolina also express their profound gratitude, thanks and appreciation to the 28 retired clergy of the Diocese who, notwithstanding understandable concerns for their health and the difficulty of participating, nonetheless attended the Special Convention to Elect the Ninth Bishop of the Diocese of Upper South Carolina on September 25, 2021.



PROPOSED RESOLUTION

The 100th Convention of the Diocese of Upper South Carolina
TRINITY CATHEDRAL PARISH
COLUMBIA, SOUTH CAROLINA
NOVEMBER 11-12, 2022

Please return completed forms on or before September 11, 2022

Proposals received after the deadline, other than resolutions originating in a Convocation meeting, will be treated as "special" resolutions which are subject to being accepted by the Convention before being considered.

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Email (completed, scanned forms): convention@edusc.org OR

Mail: *Norah Grimball, Secretary to Convention, 1115 Marion Street, Columbia, SC 29201.*

PROPOSED RESOLUTION

September 6, 2022

Katherine Robinson, Diocesan Committee on Environmental Stewardship and Justice

Date _____ Offered by _____
Trinity Cathedral Columbia

Name of Church _____ City/Town _____
Care of Creation

Subject _____

Whereas:

We pray to God to give us wisdom and reverence to use the resources of nature so that no one may suffer from our abuse of them, and that generations to come may continue to praise God for His bounty; and

Whereas, the 95th Diocesan Convention passed a Resolution recognizing the fundamental spiritual and moral obligation of all people to care for Creation through ministry, education, community service, and policy advocacy; and

Be it Resolved:

That this Convention recognize the need for all of us to examine our attitudes toward and responsibility for care of Creation, and actively evaluate the consequences of our daily choices on the environment, our communities and our planet; and be it further

Resolved, that the Episcopal Diocese of Upper South Carolina call all church communities including parishes, camps, conference centers, schools, and chaplaincies, to reaffirm their commitment to environmental stewardship and justice, and take positive steps toward prayerful solutions, including such things as energy audits, use of LED lights, cutting down on single-use plastics and

Resolution on Care of Creation
100th Diocesan Convention
November 2022

Whereas, we pray to God to give us wisdom and reverence to use the resources of nature so that no one may suffer from our abuse of them, and that generations to come may continue to praise God for His bounty; and

Whereas, the 95th Diocesan Convention passed a Resolution recognizing the fundamental spiritual and moral obligation of all people to care for Creation through ministry, education, community service, and policy advocacy; and

Whereas, in the intervening years between the 95th Diocesan Convention and this 100th Diocesan Convention, the earth and its people, especially the poorest among us, have faced an escalation of environmental problems, including heat waves, droughts, floods, intense storms, and other worsening climate chaos; and

Whereas, the delegates to the 80th General Convention passed eight resolutions dealing with care of Creation and the House of Bishops issued a statement calling environmental stewardship “our first vocation, made explicit in the first chapter of the first book of the Bible”, and declaring that selfish abuse of Creation is seen as the first sin; therefore be it

Resolved, that this Convention recognize the need for all of us to examine our attitudes toward and responsibility for care of Creation, and actively evaluate the consequences of our daily choices on the environment, our communities and our planet; and be it further

Resolved, that the Episcopal Diocese of Upper South Carolina call all church communities including parishes, camps, conference centers, schools, and chaplaincies, to reaffirm their commitment to environmental stewardship and justice, and take positive steps toward prayerful solutions, including such things as energy audits, use of LED lights, cutting down on single-use plastics and styrofoam, reducing our carbon footprint, recycling, and creating community gardens, making conscious acts of environmental stewardship part of our worship and our lives.

Submitted by Katherine Robinson, Diocesan Committee on Environmental Stewardship and Justice

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2023 SOM

Last Updated: 9.10.2022

<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022		Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
DIOCESAN RESOURCES					
1	Episcopal Pledge Assessments		\$3,527,433	\$3,360,000	(\$167,433)
2	Less: Allowance for Unaccepted Pledge Assessments		(\$872,433)	(\$560,000)	\$312,433
3	Episcopal Pledge Income		\$2,655,000	\$2,800,000	\$145,000
4	Support for Theological Ed. (Endowment)		\$8,400	\$5,500	(\$2,900)
5	Continuing Ed. for Clergy (Endowment)		\$1,400	\$930	(\$470)
6	Transfer from Diocesan Endowment Portfolio		\$115,090	\$155,270	\$40,180
7	Transfer of 30% of 2022 projected surplus		\$75,000	\$88,000	\$13,000
8	Episcopal Diocese Grant (Only for 2022)		\$40,000	\$0	(\$40,000)
9	Transfer from Canterbury Funds for Young Adult Ministry		\$0	\$47,900	\$47,900
10	Total Resources		\$2,894,890	\$3,097,599.5	\$202,710
Notes:					

	<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022	Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
	DIOCESAN EXPENSES				
	<u>Commission on Ministry</u>				
11	COM: Leadership Development		\$0	\$500	\$500
	<i>Ordained Ministry (Clergy Continuing Education and Development - new title 2023)</i>				
	<i>Clergy Continuing Education and Development (Priest and Deacons) New line item 2023</i>		\$0	\$18,000	\$18,000
12	Clergy Pre-Lenten Retreat (combined above 2023)		\$3,000	\$0	(\$3,000)
13	Fall Clergy Conference (combined above 2023)		\$3,000	\$0	(\$3,000)
14	Ministry of Clergy Spouses		\$1,500	\$3,800	\$2,300
15	Deacons (combined above 2023)		\$1,000	\$0	(\$1,000)
16	New Clergy Leadership Development (combined above 2023)		\$1,000	\$0	(\$1,000)
17	Clergy Continuing Education (combined above 2023)		\$1,500	\$0	(\$1,500)
18	Ministry to Retired Clergy/Spouses		\$2,500	\$2,500	\$0
	<i>Discernment & Theological Ed.</i>				
19	Vocational and Ministry Discernment Program		\$2,000	\$2,000	\$0
20	Diaconate Formation Program		\$1,000	\$1,000	\$0
21	Theological Education Assistance		\$8,000	\$8,000	\$0
22	Seminarian Retreat		\$7,000	\$6,000	(\$1,000)
	<i>Support of Theological Education (New line item 2023)</i>		\$0	\$5,000	\$5,000
23	Seminarian Travel (combined above 2023)		\$1,500	\$0	(\$1,500)
24	Seminarian Emergency Funds (combined above 2023)		\$1,000	\$0	(\$1,000)
25	Seminarian Book Funds (combined above 2023)		\$0	\$0	\$0
	Discernment Retreat (New line item 2023)		\$0	\$10,000	\$10,000
	Licensed Lay Ministry (New line item 2023)		\$0	\$250	\$250
26	Commission on Ministry Total		\$34,000	\$57,050	\$23,050
	<i>Commission on Christian Formation (Reformatted for 2023)</i>				
	<i>Diocesan Formation Retreats (New line item structure for 2023)</i>		\$0	\$55,324	\$55,324
	<i>Lay Leadership Development (New line item structure for 2023)</i>		\$0	\$49,800	\$49,800
	<i>Ministry Education and Training (New line item structure for 2023)</i>		\$0	\$3,980	\$3,980
27	Cursillo		\$1,700	\$0	(\$1,700)
28	Children's Ministry		\$2,600	\$0	(\$2,600)
29	Youth Ministry		\$35,200	\$0	(\$35,200)
30	Young Adult Communities: Campus Ministries	A	\$0.00	\$0	\$0

	<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022	Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
31	Adult Formation Ministry (Safe Church Trainers included)		\$3,150	\$0	(\$3,150)
32	Community of Hope		\$0	\$0	\$0
33	Education for Ministry		\$1,750	\$0	(\$1,750)
34	Episcopal Church Women		\$0	\$0	\$0
35	Commission on Christian Formation Total		\$44,400	\$109,104	\$64,704
	Commission for Congregations				
	Hispanic Ministries				
36	Holy Cross, Simpsonville - Hispanic Ministries		\$21,700	\$21,700	\$0
37	St. Francis, Greenville - Hispanic Ministries		\$27,000	\$20,000	(\$7,000)
	African American Ministries				
38	St. Thomas, Eastover		\$4,000.00	\$4,000	\$0
	New Ways of Being Church				
39	Church of the Cross, Columbia		\$4,000	\$12,000	\$8,000
40	Episcopal Service Corps		\$0	\$0	\$0
	Continuing Support				
41	Ascension, Seneca		\$27,000	\$20,000	(\$7,000)
42	St. Christopher's, Spartanburg		\$5,000	\$10,000	\$5,000
43	St. Bartholomew's, North Augusta		\$18,000	\$18,000	\$0
44	Epiphany, Spartanburg		\$12,000.00	\$5,000	(\$7,000)
45	St. Francis, Chapin		\$25,000.00	\$25,000	\$0
46	St. Mark's, Chester (New 2023)		\$0.00	\$30,000	\$30,000
	Congregational & Stewardship Development				
47	Congregational Workshops		\$4,000	\$4,000	\$0
48	Congregational Vitality and Sustainability		\$5,000	\$5,000	\$0
49	Stewardship Workshops (TENS membership)		\$1,500	\$1,500	\$0
50	Commission for Congregations Total		\$154,200.00	\$176,200	\$22,000
A Campus Ministry line 30 has investment funds in the amount of \$325,000 available for use.					

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2023 SOM

Last Updated: 9.10.2022

<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022		Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
<u>Commission on Convocations</u>					
51	<i>Commission on Convocations Total</i>		\$0	\$0	\$0
<u>Commission on the Diocese</u>					
<i>Clergy Insurance</i>					
52	Group Long-Term Disability		\$22,000	\$25,000	\$3,000
53	Group Insurance - Active Clergy		\$677,376	\$732,000	\$54,624
54	Group Insurance - Retired (now covered by CGP)		\$125,000	\$25,000	(\$100,000)
	Subtotal - Clergy Insurance		\$824,376	\$782,000	(\$42,376)
<i>Office of the Bishop</i>					
55	Bishop Stipend		\$159,000	\$185,000	\$26,000
56	Bishop Pension		\$29,600	\$33,300	\$3,700
57	Bishop Insurance		\$39,000	\$43,679	\$4,679
58	Bishop's Staff Stipends & Benefits		\$706,500	\$750,000	\$43,500
59	Staff FICA		\$26,000	\$26,000	\$0
60	Short-term disability		\$2,400	\$2,400	\$0
61	Episcopal Visitations		\$0	\$1,500	\$1,500
62	Diocesan House Admin. (utilities, phones, computers, postage, supplies, etc.)		\$150,000	\$133,000	(\$17,000)
63	Bishop's Accountable Plan for business expenses, travel, hospitality (New Desc as of 2022)		\$30,000	\$34,000	\$4,000
64	Canon Staff Accountable Plan for business expenses, travel, hospitality (New Desc as of 2022)		\$30,000	\$30,000	\$0
65	Congregational Development Consultant (New Line item 2023)		\$0	\$75,000	\$75,000
66	Non-Canon Staff Accountable Plan for business expenses, travel, hospitality (New Desc as of 2022)		\$15,000	\$20,000	\$5,000
67	Property manager shared with Trinity		\$12,000	\$12,000	\$0
68	DH Capital Maintenance Fund		\$10,000	\$10,000	\$0
69	DH Capital Maintenance Future (New Line item 2023)		\$0	\$25,000	\$25,000
70	Diocesan House Renovation Funds		\$19,800	\$0	(\$19,800)
71	Communications (e-DUSC, Web, on-line registrations)		\$25,000	\$25,000	\$0
72	Bishop Search Expenditures		\$50,000	\$5,000	(\$45,000)
<u>Support for Holy Orders Process</u>					
73	Seminarian Insurance		\$12,000	\$12,000	\$0
74	Curacy Program		\$30,000	\$30,000	\$0
	Subtotal - Office of the Bishop		\$1,346,300	\$1,452,879	\$106,579

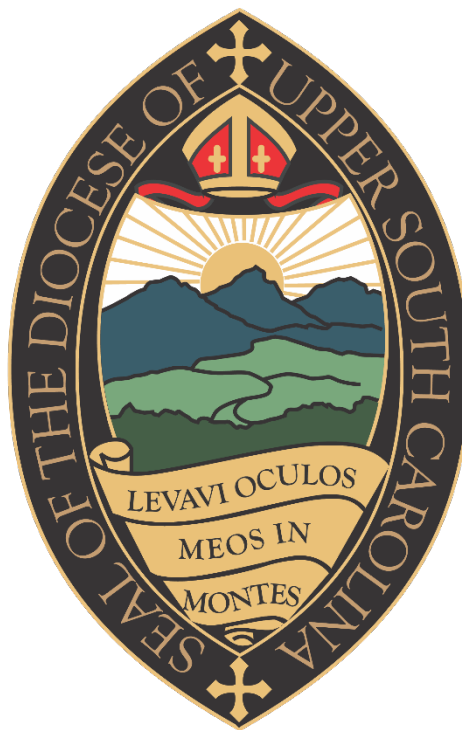
	<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022	Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
	<i>Bishop's Events:(74-79 will be summarized under this heading for 2023)</i>				
75	Clergy Business Day		\$1,000	\$1,000	\$0
76	Ordinations - Diaconate		\$1,000	\$1,000	\$0
77	Ordinations - Priesthood		\$1,000	\$1,000	\$0
78	Ordinations - Transitional Diaconate		\$1,000	\$1,000	\$0
79	Renewal of Vows		\$500	\$1,000	\$500
80	Celebrations of New Ministries		\$1,000	\$1,000	\$0
	Subtotal - Bishop's Events		\$5,500	\$6,000	\$500
	<i>Diocesan Institutions</i>				
81	All Saints', Clinton for facilities use		\$1,000	\$4,000	\$3,000
82	Still Hopes		\$1,000	\$1,000	\$0
83	Finlay House		\$500	\$500	\$0
84	Gravatt		\$1,000	\$1,000	\$0
85	Univ. of the South School of Theology (Sewanee)		\$4,000	\$4,000	\$0
86	Voorhees		\$1,500	\$1,500	\$0
87	Heathwood Hall Episcopal School		\$1,000	\$1,000	\$0
88	Kanuga		\$1,000	\$0	(\$1,000)
	Subtotal - Diocesan Institutions		\$11,000	\$13,000	\$2,000
	<i>Diocesan Convention</i>				
89	Diocesan Convention - Leadership Day & Business Day		\$15,000	\$20,000	\$5,000
90	Convention Secretary		\$2,400	\$2,400	\$0
	Subtotal - Diocesan Convention		\$17,400	\$22,400	\$5,000
	<i>Diocesan Executive Council</i>				
91	Diocesan Executive Council		\$1,000	\$1,500	\$500
92	D.E.C. Orientation & Planning		\$1,500	\$4,000	\$2,500
93	Audit & Accounting Services		\$20,000	\$25,000	\$5,000
94	Insurance - Property, Liability, Bond		\$15,000	\$20,000	\$5,000
95	Real Property Expenses		\$5,000	\$5,000	\$0
96	NEW - Diocesan Chancellors		\$3,000	\$3,000	\$0
	Subtotal - Diocesan Executive Council		\$45,500	\$58,500	\$13,000
97	<i>Commission on the Diocese Total</i>		\$2,250,076	\$2,334,779	\$84,703

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2023 SOM

Last Updated: 9.10.2022

	<i>Approved 2023 SOM</i> Approved for Convention by Diocesan Executive Council on 09.10.2022	Notes	2022 SOM Approved by Convention	2023 SOM Adjusted Allocations	2022 vs. 2023 SOM
Notes:					
	<u>Comm. on The Episcopal Church & The Anglican Communion</u>				
98	Province IV Pledge (Will be adjusted for 2022)		\$0	\$2,000	\$2,000
99	Diocesan Pledge to The Episcopal Church		\$301,364	\$305,566	\$4,202
100	Deputies to General & Synod Convention		\$15,000	\$15,000	\$0
101	Lambeth Conference		\$5,000	\$5,000	\$0
102	Ecumenical Relations		\$0	\$0	\$0
103	<i>Comm. on The Episcopal Church & The Anglican Communion Total</i>		\$321,364	\$327,566	\$6,202
	<u>Commission on Mission & International Concerns</u>				
104	Episcopal Relief & Development		\$500	\$500	\$0
105	Sustainable Development (Millennium) Goals		\$18,000	\$19,900	\$1,900
106	World Mission Committee - Cange		\$15,000	\$15,000	\$0
107	Ecuador Programs		\$15,000	\$15,000	\$0
108	SC Bishops' Public Education Initiative		\$15,000	\$15,000	\$0
109	Camp AIR (Adventures in Reading)		\$1,000	\$1,000	\$0
110	Matthew 25 Outreach Grants		\$16,000	\$15,000	(\$1,000)
111	Racial Reconciliation		\$2,000	\$2,000	\$0
112	HIV/AIDS Committee		\$1,350	\$2,000	\$650
113	Voorhees Scholars Program		\$5,000	\$5,000	\$0
114	Environmental Stewardship and Justice		\$1,500	\$2,000	\$500
115	New - SC Christian Action Council		\$500	\$500	\$0
116	<i>Commission on Mission & International Concerns Total</i>		\$90,850	\$92,900	\$2,050
Notes:					
117	Total Expenses		\$2,894,890	\$3,097,599	\$202,709
118	Net (over)/under		\$0	\$0	

THE EPISCOPAL DIOCESE
OF
UPPER SOUTH CAROLINA
101st Diocesan Convention



JOURNAL
VOLUME I

November 10-11, 2023
Christ Church
Greenville, South Carolina

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COMMISSION ON MISSION AND INTERNATIONAL CONCERNS

The Rev. Susan Louttit-Hardaway, Chair

The Commission on Mission and International Concerns seeks to support and foster missions of the Diocese to the wider state, national, and global communities. Our goal for 2023 is to better communicate to congregations of the Diocese the ministry that is being done and invite churches and individuals to join us in this important work.

Below are descriptions of the major programs reporting to the Commission and summaries of their activities during 2023.

Ecuador Ministries

Cameron and Roberto Vivanco, EDUSC missionaries in Ecuador, continue to provide a variety of programs working with some of the most vulnerable people in Quito, three remote rural areas and three coastal cities, as well as leadership development for the church. Their ministries are focused in three areas:

Education=Hope in Ecuador:

Education=Hope, a micro-scholarship program which helps provide for the education of those living in desperate and difficult situations, supported 586 students for the 2022 school year, including 12 of whom graduated from high school last spring.

Short Term Teams:

Last year we were able to host multiple Short-Term Teams. We also offered our summer internship program that simultaneously provides leadership development, team hosts for our summer teams and a discipleship program.

Leadership and Leadership Development:

Roberto serves as a pastor at a local International Church (English Fellowship Church, ASA 200). He is responsible for all the music, sits on the Board of Elders, and directs the Young Adult Ministry. Cameron serves on the Leadership Team for Youth World. They both serve in leadership of the Happening Committee and hosted a weekend retreat in the Episcopal Diocese of Central Ecuador. They also serve in leadership of the Cursillo movement and hosted a leadership retreat for that community as well. The Vivancos helped transplant both events from EDUSC.

EDUSC funding supports students at four Episcopal churches (Buen Pastor, Cristo Liberador, Santa Maria and Emaus) to help with tuition, supplies, transportation, uniforms and internet expenses. This last academic year EDUSC supported 58 students.

Cameron Vivanco and Celeste Bundy

Environmental Stewardship and Justice Committee

One of the goals of this committee is to encourage churches throughout the diocese to initiate and expand environmental stewardship ministries in their respective parishes. There is a group of environmental liaisons, representatives from interested churches, that forms the basis of the committee's work to facilitate environmental stewardship ministries and to keep lines of communication open among churches in the diocese about what projects are being done. To serve as a focal point for this communication, the Committee has been publishing a monthly e-newsletter since October 2019. The newsletter recipients include the environmental liaisons as well as other interested people throughout the diocese, and some people outside of South Carolina. Most of the issues of the newsletter highlight specific projects that churches can undertake and provide guidelines for how to implement those projects.

The committee is collaborating with the Commission on Formation to develop a resource library of variety of educational and informational materials including environmental stewardship, including curricula for church formation classes, Bible schools, youth groups, and more.

Our plan is to coordinate and launch a seminar series on environmental stewardship issues. The seminars, which will be held in both virtual and in-person formats, will be presented quarterly. The first seminar will be on the theological foundations for care of creation. Other topics include environmental justice, community gardens and food, energy and climate change, and the challenges of rampant urban development. These seminars will build on the care of creation resolutions passed at the 2022 General Convention, particularly the House of Bishops' Statement that climate change is the overarching challenge that affects all the other issues considered by the convention.

Dr. Katherine Robinson, Chair

Haiti Ministries

Jonathan Vipperman from Trinity Cathedral and Chris Klasing from Christ Church cochair this diocesan committee. Our diocese and our parish have been involved in mission work in Haiti for over 40 years, and more recently in other locations as well.

Because of the dangerous situation in Haiti, we cannot currently make mission trips down there, but our vital work continues. What our committee works on:

- **Ecole Bon Saveur** is a K-13 Episcopal school in Cange, in the central plateau of Haiti, that our diocese established in the 1980s on land owned by the Episcopal Diocese of Haiti.
- **We provide scholarships** for needy deserving students to attend Ecole Bon Saveur and other K-13 schools in Cange, about \$40K/year
- **A drinking water system** for Cange and its surroundings. EDUSC built the original system drawing water from a spring feeding Lake Peligre in the 1980s and upgraded it in 2012 with the help of Clemson University. We have been told that thanks to Clemson's help Cange has the only chlorinated water system in Haiti. There is no cholera around Cange. The diocese pays a Haitian crew to maintain the system and purchases parts when needed, about \$20K/yr
- **A medical mission** for Cange and the surrounding villages aimed at addressing hypertension. Cange has a small hospital and the remote villages are watched over by community health workers under the supervision of Zanmi Lasante, the Haitian affiliate of Partners in Health. The diocese pays for medications and a stipend for the community health workers, about \$10K/year
- **Partners in Agriculture:** Gillaine Warne -- established Zanmi Agrikol (<https://partnersinag.org/>) about 20 years ago to train Haitian farmers in sustainable agriculture. ZA founded the Centre de Formation Fritz Lafontant (CFFL), a trade school in Corporant training Haitians in agriculture, construction, and other trades. ZA is now a 501 (c) 3 nonprofit on its own. Jonathan Vipperman chairs its board.
- We support **Partners in Literacy Haiti** (<https://www.haiti-literacy.org/>) which operates libraries in the central plateau.
- We have reinstituted a program called **Adopt a Village** through which our parishes can provide support to remote villages in the central plateau. Some of our parishes have remained active in the program. We now have a brochure with information on the program and are meeting with our congregations and other groups to solicit participation.

- We partner with **Clemson Engineers for Developing Communities** (<https://cecas.clemson.edu/cedc>) to work on projects in the central plateau.

Chris Klasing/Christ Church/Greenville and Jonathan Vipperman/Trinity Cathedral-Co-Chairs

HIV/AIDS Committee

Committee members participated in *Ending the Epidemics SC / World AIDS Day*, December 1 at the State House.

This Committee is actively seeking new committee members.

Elizabeth McLendon, Chair

Matthew 25 Committee

The purpose of a Matthew 25 grant is to encourage convocations and congregations to engage and expand ministries of compassion and justice that address the needs of the poor and those at risk in their own communities and throughout the world. All proposals should exhibit clear plans to sustain their ministries beyond the grant year.

2023 Matthew 25 Grant Recipients (First Round)

Church of the Redeemer- Laundry Love

St. Bartholmew's/North Augusta- School Program

St. Andrew's/Greenville- Music Program

St. Thomas/Eastover- Historic Cemetery

Members of the Matthew 25 Committee: Libba Rhoad, St. Alban's, Lexington; Mary Tavalacci, St. George's, Anderson; Joseph Ray, St. Luke's Columbia; William S. Smith Jr, St. Luke's Columbia; Michelle Ingram-Smith, St. Luke's, Columbia; and The Rev. Deacon Mary Jeffers, Grace, Anderson

Deacon Mary Jeffers, Chair

Race and Reconciliation Committee

This Committee is in transition. If you are interested in serving on this committee, please speak to the Rev. Susan Louttit-Hardaway

SC Bishops Public Education Initiative and Vorhees Scholars

This Initiative works to draw people of the denominations it represents into active support of high-quality public education for the children of South Carolina. Encouraging collaboration among congregations and schools and keeping people informed of opportunities to make a difference in education policy are the core of this work.

The Voorhees Scholars Program is undergoing transition. This program received \$20,000 from the Presiding Bishop's Becoming Beloved Community Grants. We look forward to resuming the programing and networking connected to this grant.

The Rev. Susan Heath

Sustainable Development Goals

Formerly known as Millennium Development Goals, these are funds mandated by resolutions of the 83rd and 84th Diocesan Conventions. Diocesan SDG funds for 2023 were disbursed to support scholarships for students in the Central Plateau of Haiti and in Quito, Ecuador.

COMMISSION ON CHRISTIAN FORMATION

Canterbury Campus Ministries

“We had a Friday Bible study [in the fall semester], and I made it very casual on purpose so people wouldn’t feel like they weren’t prepared enough to show up. This approach led to some really interesting discussions that veered very far off the rails but ended up being really enlightening and thought-provoking. Ultimately, I feel like that’s the most fun part about college, so I was glad to help create that space,” Emma Harrington, Clemson University

“We attended many services at Trinity Cathedral as a group, had Eucharist in the Chapel, and we do Compline as a group often. We have created a pretty diverse group, and that creates meaningful conversation with a variety of perspectives. We have been trying to work on having a spot to call “ours,” but this has shown to have its difficulties. We have to remember that while it is frustrating to not feel settled somewhere, we can still share in fellowship together wherever we are. Canterbury of Columbia is about the people, not the place,” Alex Cheek and Jessica Putman, University of South Carolina

“We [worked through] the Gospel of John [during the spring semester] with our bimonthly Bible studies, and we have gained a small group of members to attend church together and share fellowship. I have worked to share philanthropic events and opportunities with our members to keep them connected to other groups on campus. I was able to bring a friend from high school in to visit Canterbury while she was having a hard time adjusting to college life; this shows the rest of Canterbury how we are lucky to have such an accepting community to come to,” Sara Powell, Furman University

“At the beginning of [the fall semester], we had a good amount of people coming to the weekly meetings, but that started to drop with final exams and the busy spring semester. A joyful moment from [the fall] was when we went on our excursion to the apple farm. I am no longer going to be a Peer Minister, but I believe that [Hannah Wells and Nan Davenport] are going to do a great job,” paraphrased from Cabell Anderson, Wofford College

In the spring, we said “goodbye” to our graduating Peer Ministers...

- Alex Cheek and Jessica Putman (Canterbury of Columbia)
- Emma Harrington (Canterbury of Clemson)

...and in the fall of 2023, we welcomed new Peer Ministers:

- Nick Hill and Grace Till (Canterbury of Columbia)
- Scotty Timms (Canterbury of Clemson)
- Hannah Wells and Nan Davenport (Canterbury of Spartanburg)

The Canterbury communities at Presbyterian College and Winthrop University were inactive during the 2022-2023 academic year due to leadership transitions within the partnering congregations.

In August of 2023, several active stakeholders in Canterbury ministries gathered with me and Bishop Richards at the Diocesan House to engage in discussion about the current state of our communities and where we want to go together. From that meeting, we identified pressing needs like a “playbook” to get started as a new Peer Minister and alternatives to our current model of funding that often places a financial burden on the students themselves. In September, several Peer Ministers gathered at Gravatt to participate in peer minister training, led by Lyle Griner of Peer Ministry Leadership. It was an engaging retreat, and we walked away with many new relational skills.

Submitted by Katelyn Kenney, Canon for Formation

Episcopal Youth Event

A group of six high school students, Taylor Gibby from Trinity Cathedral and diocesan staff member, Katelyn Kenney, attended the Episcopal Youth Event at the University of Maryland in College Park, near Washington, D.C. in July of 2023. The theme was “Regreso a Casa: A New Age of Faith,” which signaled a return to the denominational youth community that had been unable to gather through the COVID-19 pandemic as well as a celebration of a new generation that has been raised up as leaders through those difficult years. One of our own diocesan youth, Gracen Miller (Christ Church, Greenville), served on the EYE planning team, a major accomplishment in its own right; we were delighted to cheer her on throughout the week, and we should all be proud of how well our diocese was represented by our young people.

EDUSC Youth Delegates

- Matt G. (St. Martin’s-in-the-Fields, Columbia)
- Ally K. (St. John’s, Columbia)
- Sabrina R. (Christ Church, Greenville)
- Izzy B. (All Saints’, Cayce)
- Aedan S. (All Saints’, Cayce)
- Kelby K. (All Saints’, Cayce)

Submitted by Katelyn Kenney, Canon for Formation

Diocesan Youth Leadership Committee

2022-2023 Transitions

Members added, Fall 2022

1. Grace C. (St. Peter's, Greenville)
2. Naomi "Raven" H. (Christ Church, Greenville)
3. Allene "Ally" K. (St. John's, Columbia)
4. Leslie M. (Church of the Resurrection, Greenwood)
5. Audrey S. (St. Matthew's, Spartanburg)
6. Smith T. (St. John's, Columbia)
7. Lamar Buchanan (Church of the Advent, Spartanburg)
8. Alex Cato (St. Martin's-in-the-Fields, Columbia)
9. John Olmo (St. Simon & St. Jude, Irmo)

Members completing service, Spring 2023

1. Grace C. (St. Peter's, Greenville)
2. Matt G. (St. Martin's-in-the-Fields, Columbia)
3. Jackson G. (St. Peter's, Greenville)
4. Gracen M. (Christ Church, Greenville)
5. Emily S. (Grace Church, Anderson)
6. Joseph Z. (St. Bartholomew's North Augusta)
7. Lamar Buchanan (Church of the Advent, Spartanburg)
8. John Olmo (St. Simon & St. Jude, Irmo)

Members added, Fall 2023

1. Maddie B. (St. John's, Columbia)
2. Philip E. (Trinity Cathedral, Columbia)
3. Sarah H. (Church of the Advent, Spartanburg)
4. James L. (St. John's, Columbia)
5. Hadley M. (Christ Church, Greenville)
6. Marie "MaeMae" T. (Church of the Advent, Spartanburg)
7. Samantha "Sami" W. (St. Martin's-in-the-Fields, Columbia)

The Diocesan Youth Leadership Committee is looking forward to a year of greater collaboration between youth members and the diocesan staff coordinator (Katelyn Kenney) and deeper investment in leadership development, particularly through our admissions process.

Diocesan Youth and Young Adult Formation

Converge at the Cathedral

This past October, nearly 50 middle schoolers gathered at Trinity Cathedral for an overnight retreat hosted by the Diocesan Youth Leadership Committee. Members Gracen (Christ Church, Greenville) and Matt (St. Martin's-in-the-Fields, Columbia) helmed the team as we talked about how our unique gifts can give us the courage to be bold in our faith! The Rev. Mia McDowell served as our chaplain, and we were greeted by other Cathedral clergy throughout the retreat.

Vocare #13

This year's Vocare weekend focused on the heart of the vocation to which all Christians are called: following Jesus Christ. Led by the Rev. Garrett Ayers (St. John's, Columbia), young adults spent the weekend exploring scripture and prayer, shifting our focus from what the world expects us to do to who God invites us to be. We spent time in scriptural study and prayer, making for a more contemplative weekend experience.

SMASH!

SMASH! returned to Seabrook Island for another weekend of fun at Camp St. Christopher. This year, conveners Emmie (St. Martin's-in-the-Fields, Columbia) and Leslie (Church of the Resurrection, Greenwood) took us through the beginnings of the story of Moses, when he was first chosen by God. Even though the weather was less than ideal, participants still got to enjoy the surrounding dunes and walk on the beach. And, of course, it wouldn't be SMASH! without some smashing: objects of choice were plates decorated with difficult phrases and experiences and a piñata filled with affirmations. The Rev. Mark Abdelnour served as retreat chaplain.

New Beginnings

This spring, the Diocesan Youth Leadership Committee revamped and relaunched the beloved New Beginnings program. Our sparse team of four, convened by Raven (Christ Church, Greenville) and Ally (St. John's, Columbia), handled the weekend beautifully. From big group games and high ropes to time on the lake and learning more about God's love for us, it was a fun weekend, all around. A major highlight was the Saturday night talent show, followed by a surprise dance party at the pavilion! The Rev. Dorian Del Priore (Holy Cross, Simpsonville) served as retreat chaplain.

5th Grade Bridge Retreat

Convened by Smith (St. John's, Columbia) and Cole (St. Martin's-in-the-Fields, Columbia), fifth graders from all over the diocese spent just about 24 hours on the grounds of Camp Gravatt preparing for the journey of transitioning from elementary school to middle school by going on an adventure together. We learned how our "toolkits," filled with our gifts, our prayers, our relationships, and more, help us move through life's joys and difficulties by keeping us grounded to what matters most. Our retreat chaplains were the Rev. Teddy Higgins (St. Paul's, Batesburg) and the Rev. Lathrop Mosley (St. James, Greenville). And huge thanks to Gravatt staffers Evan and Daniel for joining us in all the fun!

Cursillo

Cursillo is a ministry of the Episcopal Church, providing a method by which Christians are empowered to grow through piety, study, and action and to share God's love with everyone. One of the purposes of Cursillo is to grow Christ-centered leaders. As a result, our diocese becomes more spiritually vibrant and responsive to the needs of others. Guided by the national Episcopal Cursillo Ministry (ECM), key elements are relationship, evangelism, and reconciliation in the home, the parish, the community, and the world. "Make a Friend, Be a Friend, Bring a Friend to Christ" is the heart of this ministry.

The Episcopal Cursillo Weekend offers a time to experience living in a supportive Christian community. The weekend includes fifteen talks, five meditations, various services from our Prayer Book, and Eucharist every day. The weekend and supporting events and services afterwards offer an opportunity to gather clergy and laity, to experience the reality of God's gift of love through shared prayer, individual meditations, worship, study, fellowship, laughter, tears, and unconditional love.

The three-day weekend is not an end to itself. It is a starting point, a springboard to a long-range practice of the Baptismal Covenant in the life of the Church called the "Fourth Day." The Fourth Day provides small and large group gatherings to hold each other accountable for spiritual growth. Spiritual direction is encouraged to deepening our relationship with Christ.

Since our last report, there have been three Cursillo weekends: #143 Fall 2022, #144 March 16 – 19, and #145 Sept. 28 - Oct 1 in 2023. We are grateful for the support from the diocesan staff in promoting the weekend to church administrators and clergy. We have continued to simplify our schedule, with more focus on time for rest, reflection, relaxed spontaneity, large and small group discussions, and group singing. We are working to bring fresh and new music to Cursillo. We are also working to include more clergy and people from parishes throughout the Diocese.

Our Grand Ultreya at Trinity Cathedral in May 2023 gathered 100 people from our diocese and other Fourth Day communities (Presbyterian Pilgrimage and Catholic Cursillo). We are networking with other denominations to strengthen our mutual ministries. We are grateful to have Bishop Richards celebrating at our Ultreyas and Weekend Closing Services. The National Episcopal Cursillo Convention held at Virginia Theological Seminary in Alexandria VA Sept. 20 – 23, with eight people from our Diocese attending.

The EDUSC Cursillo Council includes lay and clergy representatives from a variety of parishes. We continue to revise and improve Policies and Guidelines, as well as financial procedures.

The Cursillo ministry is a vibrant example of living out our diocesan mission: Making, Equipping and Sending Mature Disciples of Jesus Christ."

Submitted by Kaye Curtis, 2023 Council President and Janet Jendron, Communications Coordinator

Safe Church, Safe Communities Training

Early in 2023, congregations were asked to identify someone to manage their 'learners' in Praesidium Academy ("Praesidium Academy" is the name of the platform used for online *Safe Church, Safe Communities* training). As managers, these individuals would have the capability to add new 'learners' for training, view their progress, and generate reports. In February, the individuals who stepped forward participated in a virtual training led by a representative from Praesidium. Training parish staff, or even volunteer parishioners, alleviates the administrative load on the diocesan staff administrator but also gives parish leadership the tools to answer questions that would otherwise require the assistance of the diocesan administrator.

Over the course of the year, The Episcopal Church officer for *Safe Church, Safe Communities* has hosted a number of virtual webinars to train individuals to serve on the diocesan level to train other, more local trainers. So far, we've had one individual complete this training who is currently serving as a trainer to their parish. It has become apparent that there is a need to revisit the training structure and roles we've traditionally used in our diocese before formally reintroducing the practice live training sessions (in the interim, several congregations have hosted training sessions where individuals bring their laptops and work through the modules together but on their own devices). For instance, prior to shifting primarily to online training, the diocese had a roster of several trainers who would lead live training sessions at the behest of a congregation. The model The Episcopal Church is seeking to employ, as I understand it, involves one or two diocesan level trainers who deeply understand the curriculum and have a breadth of experience with Safe Church policy training multiple, more local trainers, presumably to serve as "in-house" trainers. All this to say, I, along with the Commission on Christian Formation, will need to go back to the drawing board, so to speak, to determine how to integrate this structure into our own context.

Submitted by Katelyn Kenney, Canon for Formation

Education for Ministry (EfM)

Founded in 1975, Education for Ministry (EfM) is a program of lay theological education developed by Sewanee, the University of the South. It is designed to help the faithful to discover and nurture their call to Christian service. As the emphasis on lay ministry has grown in the Episcopal church, EfM has come to play an important role by providing a program that develops an informed and knowledgeable laity. Mentors lead small groups of 6-12 participants in a seminar setting for 36 weeks a year; over a four-year cycle the groups discuss the Bible, church history, and current theological topics.

The pandemic had a drastic effect on EfM enrollment worldwide and in EDUSC but also provided an opportunity to re-vision the program, including a complete overhaul of the registration and information systems via Pathwright, the online learning platform. The Rev. Kevin M. Goodman assumed the responsibility of Executive Director and laid out his vision for the program in June 2023. Two mentors from EDUSC, Kevin Mertens from Christ Church Greenville and Terri Bailey from St. Martins-in-the-Fields Columbia, attended the Summer Celebration at Sewanee in June and learned of the planned short courses of 4-6 weeks which will make the EfM message more accessible to the laity.

Submitted by Terri Bailey, diocesan EfM Coordinator

Commission on Ministry

Anna Brawley, Chair

The activities of the Commission on Ministry in 2022 included the following:

- Met with two inquirers in discernment
- Recommended one inquirer for postulancy
- Recommended one postulant for candidacy
- Recommended one candidate for ordination to the priesthood
- Continued to monitor the progress of eight seminarians
- Celebrated the ordination of one postulant to the transitional diaconate and the priesthood
- Met with Bishop Richards about his vision for our discernment process and began to work toward implementing that process

The Commission continues to work to make the discernment process a holy and good experience for those who engage in it. In 2023, we will continue work alongside Bishop Richards, along with Canon Rhoades, to promote a process that intends to treat discerners as partners with us in Gospel ministry.

Submitted by Anna Brawley

Commission on Convocations

The Rev. Catherine L. Tatem, chairperson

The Commission on Convocations is holding quarterly meetings via Zoom.

Convocation meetings throughout the Diocese are taking place in person, and via Zoom, or in a blended format as decided upon in each Convocation. Similarly, Clericus gatherings take place both in person and via Zoom in each Convocation.

The Commission on the Diocese seeks to support the Convocations of the Diocese and to make recommendations to the Executive Committee of the Diocesan Executive Council and the Bishop.

Recommends to the Bishop a slate of Dean and Lay Warden candidates to serve as the primary representatives of the Bishop and Council in each Convocation.

In 2024 the Commission seeks to further define its role and to provide vocational and spiritual support to clergy and lay wardens in order to support their ministries to “equip the saints” for ministry.

Meetings: January, April, July, October; members attend a Diocesan orientation in early December of each year.

Respectfully submitted, The Rev. Catherine L. Tatem, chairperson

COMMISSION FOR CONGREGATIONS

The Rev. Mary Balfour Dunlap, Chair

The Commissions for Congregations helps congregations grow and strengthen in their ministry to their members, communities, and as members of the Episcopal Diocese of Upper South Carolina. Resources in Congregational vitality, stewardship, communication, and strategic planning are provided as support is needed. We also assist our Hispanic missions in Greenville and Simpsonville.

The current members of the commission are: Ms. Genevieve Alert, Ms. Mary Ann Belser, Mr. Frank Boineau, Mr. Martin Darby, The Rev. Mary Balfour Dunlap (Chair), Mr. Rick Gilliam, The Rev. Deacon Mary Jeffers, Ms. Grace Keller, The Rev. Lathrop Mosley, and our staff liaison is The Venerable Jane Rogers Wilson.

Each Commission member is assigned to a mission church in our Diocese which requests funding from the Statement of Mission. The committee member meets with the mission, reports their needs, supports them in finding resources, and serves as general support, especially in the area of helping them to discover their divine purpose. Perhaps most importantly, our commission seeks to make these churches feel connected as a member of the Diocese and seeks to facilitate the needs they might encounter in fulfilling that role. Our first Mission and Small Parishes Retreat was held in October of 2022. It was a huge success! We were able to bring the missions and small parishes together, share helpful informational resources and simply be in fellowship. It is our hope is to continue sharing God's love to these missions and parishes. This year's retreat will be held at Camp Gravatt, October 27-28 with Bishop Richards in attendance.

The Commission for congregations also oversees all requests for funding from the Statement of Mission from those missions in need of financial support, works with missions that are interested in attaining parish status, and serves as a supportive resource system to any mission or parish in the Diocese that needs our help.

Current Missions that are receiving funds or being supported by the Commission for Congregations:

- Ascension, Seneca
- The Church of the Cross, Columbia
- Church of the Epiphany, Spartanburg
- St. Augustine of Canterbury, Aiken
- Saint Bartholomew's, North Augusta
- St. Christopher's, Spartanburg
- St. Francis of Assisi, Chapin
- St. Francis, Greenville
- The Hispanic Congregation at Holy Cross Church, Simpsonville
- St. Mark's, Chester
- St. Thomas, Eastover

Missions that have not requested funding or support from the Commission for Congregations:

- St. Phillip's, Greenville
- St. Peter's, Great Falls
- St. Barnabas, Jenkinsville
- All Saints, Beach Island
- Trinity Church, Abbeville
- St. Michael & All Angels, Columbia
- Calvary Church, Glenn Springs
- Church of the Nativity, Union
- St. Luke's, Newberry
- St. Bartholomew's, North Augusta

St. Augustine of Canterbury, Aiken
St. Francis of Assisi

Faithfully Submitted,

The Rev. Mary Balfour Dunlap

COMMISSION ON THE DIOCESE
RADM Stephen I. Johnson USN (ret.), Chair

The Commission on the Diocese (COD) is charged with the oversight and stewardship of the financial resources of the Diocese. The COD also formulates and recommends policies related to diocesan investments, finance, health and property insurance, stewardship, loans, audits, architecture, personnel, and the institutions of the Diocese. In our quarterly meetings, the COD reviews financial reports of the Diocese, including preparation of the annual Statement of Mission, investment reports, and audit reports.

The review of the draft SOM and the accompanying financial oversight occupies a substantial part of the COD's agenda every year. This year the Diocese saw not only a decline to pre-pandemic historical giving participation but also an increase in the challenge posed by less than full participation by many churches in the Diocesan asking. The continuing aging demographic of church supporters is starting to severely impact churches as their revenues begin to decline accordingly. Several long-time fully supportive parishes were unable to accept their full pledge this year due to the combination of this demographic reality and a nationwide slow rebound in church attendance after the pandemic. As a result, the Statement of Mission recommended by the Commission to the Standing Committee and as submitted to Convention is a resource-constrained budget that could not fully fund all of the requests from Commissions. The projected revenue shortfall was supplemented with an approximately 4.1% draw from Diocesan investment funds to minimize the impact on Diocesan Mission of this reduced Episcopal Pledge revenue expectation while maintaining a healthy endowment for future needs.

There is no change in the continuing challenge of supporting our mission churches with the maintenance needs of their aging infrastructures. This problem is another reflection of the worldwide demographic currents that are making the world more secular, thereby reducing the number of people who participate in organized religion. Significant reflections of those trends include the smaller percentage of young people who are attending church, and the fact that those that are attending are, on average, supporting their churches with a lesser percentage of their

income. This is true not just in the Episcopal Church, but among all faiths in the vast majority of countries.

The decline this year of full acceptance and payment of the Episcopal Pledge by Diocesan parishes provides increased uncertainty in revenues in 2024. The COD felt obligated to recommend a resource-constrained 2024 SOM \$78,142 less than requested by the Commissions.

Submitted by RADM Stephen I. Johnson, USN (ret.) Chairman

