



99th Diocesan Convention – Business Session

*Saturday, November 6, 2021
Christ Church, Greenville*

7:30 AM	Certification opens and continues throughout the day	
9:00 AM	Call to Order	The Rt. Rev. W. Andrew Waldo <i>Eighth Bishop of Upper South Carolina</i>
	Certification of Quorum	Dr. Norah Grimball <i>Secretary of Convention</i>
	Report of Committee and Dispatch of Business	The Rev. Canon d'Rue Hazel Bishop's Convention Officer
	Report of Committee on Credentials	The Rev. Janey Wilson <i>Chair, Committee on Credentials</i>
	Election of Diocesan Convention Secretary	Ms. Melissa Langford <i>Assisting Secretary, Diocesan Executive Council</i>
	Election of Treasurer	Mr. Ethan Cashwell <i>Vice- President, Diocesan Executive Council</i>
	Report of Nominations Committee Receipt of Nominations <i>from the Floor</i>	The Rev. Mike Flanagan <i>Chair, Nominations Committee</i>
	Ballot 1	The Rev. Raphiell Ashford <i>Head Teller</i>
	The Report of the Committee on Constitution and Canons	Ms. Cindi Ross Scoppe <i>Committee on Constitution and Canons</i>
	Report of the Committee on Resolutions Receipt of Resolutions from the floor	Ms. Angela Daniel <i>Chair, Committee on Resolutions</i>
	Report of 1st Ballot The Rev. Raphiell Ashford	<i>Head Teller</i>
	Ballot 2 (<i>if necessary</i>)	

Presentation of the 2021 Treasurer's Report

Dr. Bill Sandberg
Diocesan Treasurer

Presentation and Approval of the 2022 Statement of Mission

Dr. Bill Sandberg
Diocesan Treasurer

Report of 2nd Ballot

The Rev. Raphiell Ashford
Head Teller

Discussion and Consideration of the Proposed Resolutions

Ms. Angela Daniel
Chair, Committee on Resolutions

Cuthbert Cross Award

The Rt. Rev. W. Andrew Waldo
Eighth Bishop of Upper South Carolina

Break

Holy Eucharist
Convention Address

The Rt. Rev. W. Andrew Waldo
Eighth Bishop of Upper South Carolina

Invitation to the 100th Diocesan Convention
November 11-12, 2022

The Very Rev. Dane Boston
Dean, Trinity Cathedral, Columbia

Report on Agenda and Dispatch of Business

The Rev. Canon d'Rue Hazel
Bishop's Convention Officer

Adjourn

The Rt. Rev. W. Andrew Waldo
Eighth Bishop of Upper South Carolina

Business Day will conclude when all items on the agenda are addressed.

*Immediately following adjournment a reception to honor Andrew and Mary Waldo
will be held In the courtyard outside of the church.*

Dr. Norah T. 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 Hospitality Ministers, Chair of the Eucharistic Ministers, Chair of the Finding God's Path Ministry, member of the Needlework Guild, and a recovery coach in the Family Recovery and Support Ministry. Previous Cathedral service includes Dean Search Committee, Junior and Senior Wardens, Vestry, Finance Committee, Diocesan Convention Delegate, Eucharistic Visitor, Pastoral Care Team Chair.

On the diocesan level, she serves as Secretary to Diocesan Convention, a Deputy to General Convention (2015, 2018, 2022), member of the Commission on the Episcopal Church and the Anglican Communion, the Commission on Ministry, the Commission on the Diocese and the Bishop Search Transition Committee. She previously served on DEC/Standing Committee (Secretary) and as Chair of the Resolutions Committee, Chair of the Bishop's Interview and Discernment Committee, Co-chair of the Commission on Ministry of the Baptized, 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.

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.

Election 1. The Standing Committee (Diocesan Executive Council) – 3 Clergy

Clergy Nominees:

The Reverend Jack Hardaway



Jack is from Greenville, is a graduate of Eastside High School, and Furman University. St. James is his home parish. Bishop Beckham confirmed him there, and they sponsored him for ordination. He graduated from Virginia Seminary in 1995, and served at St. Peter's Greenville for over two years as the assistant to the rector. Bishop Henderson ordained him Deacon and Priest. He was the rector of St. Paul's, Fort Mill, from 1997 until 2004, and has been the rector of Grace Church, Anderson, since 2004. He is married to the Rev. Susan Louttit Hardaway, the rector of St. George's in Anderson. They have three children, all out of college. Two are married and living the dream, and the third is painting fabulous murals that she dreams up.

He has served on the Diocesan Middle School Steering Committee, Total Ministry Committee, Examining Chaplains, three different Young Vocation Task Forces, taught early Church History and Theology for the School for Ministry, and has been a Spiritual Director for Happening and Cursillo. He

has served on the Diocesan Counsel (D.E.C.) four times, including as the Vice President, and as the Dean of the Foothills Convocation. He served on the Bishop Search Committee for our eighth bishop, and has been a deputy to General Convention almost two times. He is a fourteen-year volunteer and the board member of the Anderson Soup Kitchen. He thinks it is all about having a vision of God that is good news for everyone, all the time. Having a good recipe for mustard BBQ sauce helps too.

The Reverend Sally Franklin



The Rev. Sarah C. Franklin (Sally), ordained for 27 years, has been rector of St. Paul's, Fort Mill for over 16 years. During this time she has served on the Cursillo Council, the Bishop's Interview and Discernment Committee, the Diocesan Transition Committee, the Diocesan Executive Council, the Commission on the ministry of the Baptized, the Commission on Convocations, the Diocesan Insurance committee and is now serving on the Commission on the Diocese. Prior to ordination, Sally worked as a certified public accountant for seven years, specializing in taxation.

The Revered Caitlyn Darnell



The Rev. Caitlyn Darnell is the associate rector of St. Martin's-in-the-Fields in Columbia, SC. She grew up on the High Plains of Colorado but came East to attend the College of William and Mary. There, she earned a B.A. in religious studies, focusing on Hebrew scriptures and Christian ethics. She was formed for priesthood at Yale Divinity School. A lifelong Episcopalian, Caitlyn is proud to have worked as a lay person in the church for 7 years prior to ordination, served in the Episcopal Service Corps, and served on the United Thank Offering board. Previous side hustles have included rock climbing teacher, craft beer marketer, youth minister, and dog trainer. If you are looking for Caitlyn on a Sunday afternoon, you'll find her romping around with Bentley, her Wheaten Terrier, or "supervising" her fiancé's dinner preparations.

Election 2. The Standing Committee (Diocesan Executive Council) – 3 Lay

Lay Nominees:

Mr. Frank Boineau



The Episcopal Church has always been there for me since my baptism as an infant. It continues to do so as an adult. As a pediatrician who specialized in children's kidney diseases, I have witnessed God's creations and gifts as well as pain and suffering of children, parents and guardians. Through all this God has provided support and direction in times of sorrow and joy as I assisted my patients and their families. My exploration of my faith continues with Education for Ministry as a fourth year participant.

I have served the parishes in which I was a member in many ways over my life. These include senior warden, junior warden, vestry member, member of many committees. My first experience was election to the vestry of a combined Episcopal-Presbyterian Church in Rochester, NY. Most recently as a member of the Diocesan Executive Council of the Upper Diocese of South Carolina as Lay Warden from the Foothills Convocation. This term ends in November 2021. All of these experiences have prepared me to continue serving

as an elected member of DEC. I strongly support the diocesan initiative to make our parishes inclusive and welcoming for all who come.

My wife and I have been members of St. Peter's in Greenville for the past 16 years having moved here from New Orleans, LA where we were members of Holy Comforter Episcopal Church for 27 years. We have two adult children and 4 grandchildren. We spend our time traveling, especially to see grandchildren, working in our garden, and myself teaching medical students in Greenville. My wife and I are originally from Orangeburg, SC.

Mr. Rick Gilliam



Professionally, Mr. Gilliam presently is the Parish Manager for St. Paul the Apostle Church in Spartanburg. He worked as a consultant and accountant assisting various companies with transitions and changes. Recent projects were with R. J. Reynolds in Winston Salem, NC.,

Greenville Health System (presently Prisma) and Global Lending. Previously, he was the CFO of a textile equipment company, and a specialty textile manufacturer. He also was a Senior Manager with Deloitte Haskins and Sells, and on the Finance Staffs of Pneumo Corporation and Ford Motor Company.

He received a Master of Business Administration from Emory University and a Bachelor of Science in Business Administration from East Carolina University. He attended Christ School in Arden, NC.

He has been married to Elizabeth for 36 years and they have two grown children; Richard who resides in Spartanburg and Sally who resides in Charlotte.

Mr. Gilliam is a lifelong Episcopalian, and has been a member of The Church of the Advent for over 25 years. He previously served the Episcopal Diocese of Upper South Carolina on its

Ecclesiastical Disciplinary Board, and was the President of the Board during his last year of service. At the Advent he has served on the Vestry, participated on over ten (10) Mission Trips to the Cumberland Plateau of Tennessee (Sewanee), to Fort Payne, Alabama in support of tornado relief, and to St Paul's Chapel of Trinity Church -Wall Street after 9/11.

Prior to worshipping at the Advent, Mr. Gilliam was a member at Christ Church (Charlotte), Christ Church (Shaker Heights, OH) and other parishes in ten dioceses. His mobility is attributable to growing up as a "PK" (priest's kid) and being a "corporate gypsy" early in his career.

Ms. Jodie Webb



I am 52 years old. I was raised in Allendale, SC. I have also lived in Columbia, Charleston, and Anderson (for the last 22 years). I graduated from Smith College in Northampton MA. I have worked for Nationwide Insurance my entire career as an insurance adjuster (casualty) and now a fraud investigator. I am married and have a 16 year-old son, a cat and a dog. I have attended Grace

Episcopal since around 1998. My roles at Grace Episcopal have been:

Christian Formation:

- a. Sunday school teacher since 2000 - 2020.
- b. Christian Formation Committee Chair (2005 – 2015)
- c. VBS Organizer (2 years)
- d. Training youth to be torch bearers and acolytes

• Vestry (2015-2017)

• Saturday Servants (volunteer and then co-organizer 4 years)

- Volunteer and then Organizer of the Grace Episcopal Annual Soup Luncheon (2017-present)
- Wednesday Night Dinner Committee Chair (2017)
- Insurance Committee Co-chair

Election 3. Trustee of the University of the South – Lay Order – One New Member

Lay Nominees:

Ms. Molly Dougall



Molly is a member of St. Martins-in-the-Fields, Columbia. She is currently a member of the vestry and enjoys serving with the feeding ministry and teaching children's chapel. She grew up in the diocese and served as a Counselor at Camp Gravatt for many years. More recently, she served a term on the diocesan Commission for Christian Formation. She earned her undergraduate degree from Sewanee: The University of the South, majoring in chemistry which led her to earn her Doctor of Pharmacy from Presbyterian College in Clinton, SC. She further pursued a residency in rural healthcare with the Health Wagon in Wise, Virginia. She is passionate about education and indigent care.

She served on the University of the South Board of Trustees in 2017-2020 and looks forward to an opportunity to serve again. Molly enjoyed her time on the board working with the orientation committee and the community relations committee. She enjoyed learning about the innerworkings of higher education and looks forward to serving her beloved Sewanee once again. Yea, Sewanee's Right!

Mr. Benton Williamson



Benton Williamson currently serves as a Sewanee Diocesan Trustee where he is active on the Church Relations Committee and is seeking reelection.

Benton is a native of Darlington, South Carolina. He and his wife Elisabeth Williamson have been active members of St. John's (Shandon) for over 35 years. Benton's service to St. John's includes several terms as a vestry member and junior and senior warden, Sunday school/confirmation teacher, member of various finance, stewardship and building committees. Benton currently serves as a lector/chalice bearer and is on the adult Christian formation and finance committees.

With regard to service to the Diocese, Benton currently serves as a Diocesan convention delegate and served on the Select Commission for Constitution and Canons (1997) and the Standing Committee (pre-DEC). More recently, he has been a member of DEC and the Standing Committee. Also he served on the Board of Trustees of Still Hopes (former Chair) and the Board of Trustees of Camp Gravatt (former Chair) and has been actively involved with the Episcopal Church Home at York Place.

Benton currently serves as Diocesan Trustee and is active in the Sewanee Club of Columbia, is an EFM graduate and served on the Parent's Council and the Executive Board of the Associated Alumni. He and Elizabeth are parents of Sewanee graduates Betsy (C' 2010) and Locke (C' 2017), have 2 other children DuBose and Sara and a daughter-in-law Francis (C' 2008).

For some 40 years, Benton has practiced commercial/corporate real estate and finance law with Haynsworth Sinkler Boyd, and its predecessor firms. He is also an adjunct professor at USC School of Law and is active in various professional, civic and charitable organizations. He received his undergraduate degree with honors from Sewanee, a degree in Jurisprudence from Oxford University and his J.D. from The University of Virginia School of Law.

Ms. Elizabeth Moosbrugger



Elizabeth McKay Moosbrugger graduated from The University of the South as an English major in 1989. She has a Masters in Organizational Development from Case Western Reserve University in Cleveland, Ohio (1995). Elizabeth was born and raised in Columbia, SC, where she was a member first at St. Martins in the Fields then moved with her parents to Trinity Cathedral in high school. After college she moved to Cleveland, Ohio to work in Sales for BFGoodrich. After getting her Master's degree she worked in Human Resources for The Lubrizol Corporation. In 1997, she left corporate life and started a Personal and Professional Coaching practice.

Elizabeth was an active member at St. Paul's Cleveland Heights, OH serving on vestry 2003-09 (Clerk 2006-09), the Long-Range Planning Committee (Co-Chair), Altar Guild 2002-14 (President 2013-14) and various other committees. She served the Diocese of Ohio on the Standing Committee 2011-2015 (President 2015), the Diocesan Nominating Committee 2009 - 2014 (Chair 2013-14), as a Church Transitions

Consultant (2014-18), and Chaired the Bricks for Haiti Diocesan response to the Haitian earthquake. She worked for The Episcopal Church through The Credo Institute as a Conference Administrator (2010-15) and the Church Pension Group as a Conference Administrator and Conference Leader (2015-17). She and her husband John moved back to Columbia in the summer of 2019 to be closer to family and became members at Trinity Cathedral. She has two grown children. Currently, Elizabeth owns and operates Big Momma Box, a startup company providing safe onsite storage primarily for the construction market, and maintains her coaching practice. She loves cooking for her friends, gardening, spending time with family and training her dog, Betty.

Election 4. Ecclesiastical Disciplinary Board – Lay Order – One New Member

Lay Nominee:

Toby W. Goodlett



Toby W. Goodlett has been a member of Trinity Episcopal Cathedral in Columbia, SC since 2009. During this time, he has served as a Sunday School teacher and supported the church choir in fundraising. He has two children, Mazie and Spears, that served in the church choir and held the position of Head Chorister during their service. Prior to joining Trinity, the Goodlett family were members at St. Matthias Episcopal Church in Toccoa, Georgia where Toby served on the vestry and was a member of the choir.

Toby grew up in Spartanburg, SC. He graduated from the University of South Carolina with a BA in Political Science. Toby has been in banking over thirty years and currently serves as Executive Vice President/ Retail Services Executive for First Citizens Bank.

Toby is a graduate of the School of Mortgage Banking and the 2000 MBA Future Leaders program. He holds a Certified Mortgage Banker (CMB) designation and was named “Mortgage Banker of the Year” in 2002 by the Mortgage Bankers Association of the Carolinas, Inc. He serves as Vice

President of the board of trustees for The Columbia Museum of Art.

Previously, Goodlett served as Chairman of the board of trustees for Columbia College, as a board member for SC Governor’s School for Science & Mathematics Foundation, as a board of trustees member for Heathwood Hall Episcopal School, as a board member for The Nickelodeon Theatre, as a board member for South Carolina Independent College Association, Columbia Housing Development Corporation and the City of Toccoa Planning Commission, as vice chairman of North Georgia Technical College, as division nine chairman of the Georgia Bankers Association, as chairman of the Toccoa-Stephens County Chamber of Commerce, and as president of the Mortgage Bankers of the Carolinas.

STILL HOPES BOARD OF TRUSTEES NEW BOARD MEMBERS 2022 - 2025

Preston Sabalis

Synovus | Senior Vice President, Commercial Banking

Preston is a graduate of the University of South Carolina with a B.A. in Political Science. He joined Synovus Bank in 2003 as part of the management training program. Upon completion he managed several Branches in the Columbia area, joining the Commercial Banking Team in 2013 where he works with commercial clients and prospects to determine services to fit their needs.

Preston is actively involved in the community, currently serving as Board Treasurer for The Nurturing Center, United Way of the Midlands Campaign Committee, Business Division Chair, a former Board Member of Communities in Schools of the Midlands, and member of Trinity Episcopal Cathedral. Preston is married to Louisa Weathers Sabalis and has a son, Thomas (13) and daughter, Frances (11).

Laura Bogan Herpel

Sleep and Pulmonary Physician, Bogan Sleep Consultants

Laura is a board-certified pulmonologist and sleep medicine physician with experience and board certifications in internal medicine and critical care medicine. She graduated from Hendrix College in Conway, Arkansas (a small Methodist funded pre-professional liberal arts college similar to Wofford) earning a BA in biology with distinction in field of study. Raised in Arkansas, she then moved to Columbia, SC in 1995 where she attended the University of South Carolina School of Medicine, graduating 4th in the class, and was president of the Medical Student Association. She moved to Baltimore, MD in 1999 where she completed residency training in Internal Medicine and fellowships in Pulmonary/Critical Care and separate Sleep Fellowship training at The Johns Hopkins Hospital as well as pursuing studies in Graduate Training in Clinical Investigation at The Johns Hopkins Bloomberg School of Public Health.

Upon completion of Fellowship training, she moved to Mount Pleasant, SC where she was Assistant Professor in Pulmonary Critical Care and Sleep Medicine at the Medical University of South Carolina. In 2011, she moved to Columbia with her husband Dave and two daughters (now 13 and 16). Laura was in a hospital owned practice with Providence, and later Palmetto Health/Prisma practicing Pulmonary, Critical Care and Sleep medicine. Laura was on the Medical Executive Committee with Palmetto Health Baptist Parkridge and was the physician for pulmonary consults, Intensive Care Unit/Critical Care Consults, outpatient pulmonary/sleep medicine and Director of the Palmetto Health Hyatt Parkridge Sleep Center.

In 2018, she joined Bogan Sleep Consultants where she practices sleep and pulmonary medicine. She participates in clinical research in areas of sleep and pulmonary medicine for clinical trials that extend nationally and internationally in areas of disorders of hypersomnolence, sleep apnea, restless legs syndrome, and pulmonary fibrosis. Laura also consults for Med Trials, LLC for clinical trials involving corona virus treatment, asthma, and chronic obstructive pulmonary disease.

Wade Stinnette

Principal and Senior Portfolio Manager, Wallick Investments, LLC

Wade has been working with investment clients since 1986 and has served in various capacities within small, boutique investment firms and at large bank trust departments. He has extensive experience as a stock analyst and as a multi-asset portfolio manager. In 2015, he joined Wallick Investments, a Columbia-based registered investment advisory firm that specializes in designing and managing multi-asset portfolios for individuals, institutions, and other non-affiliated advisors.

Wade graduated With Distinction from the Virginia Military Institute in 1980 with a B.S. degree in Chemistry and served six years as a Commissioned Officer in the United States Marine Corps. He is a past Secretary and Treasurer of the CFA Society of South Carolina and has served on the boards of directors of several non-profit organizations. He is a member of Trinity Episcopal Cathedral where he has served on the Vestry, including as Senior Warden, as a Diocesan Delegate, and on the Trinity Foundation Commission. Wade and his wife, Lannie, have three children and four (soon to be five) grandchildren.

REPORT OF THE COMMITTEE ON CONSTITUTION AND CANONS
99th DIOCESAN CONVENTION
EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA
November 6, 2021

The Committee on Constitution and Canons did not receive any timely proposals for amendments to the Constitution or Canons of the Episcopal Diocese of Upper South Carolina to be voted on at the 99th Diocesan Convention, and the Committee has not proposed any such amendments.

The Committee is aware that a number of lay delegates and clergy have raised questions about the advisability of amending the clergy quorum requirements for a convention to elect a bishop set forth in Title I, Canon 4, Section 1(d) of the Canons. The Committee intends to address this matter, among others, over the next year, and expects to present proposed amendments to the Canons for a vote at the 100th Diocesan Convention in 2022.

Title XI, Canon 1, Section 1(a) of the Canons requires that any proposed amendment to the Canons be submitted in writing to the Secretary of Convention at least 60 calendar days prior to commencement of Convention. Because no proposed amendment relating to the canonical clergy quorum requirements for a convention to elect a bishop was submitted to the Secretary to Convention by that date for the 99th Convention, any motion from the floor at the 99th Convention on November 6, 2021 could not be voted on, and would be out of order.

This ends the Report of the Committee on Constitution and Canons.

Respectfully submitted,

Suzanne Hulst Clawson, Chair
Committee on Constitution and Canons of the Episcopal Diocese of Upper South Carolina



PROPOSED RESOLUTION

The 99th Convention of the Diocese of Upper South Carolina CHRIST CHURCH GREENVILLE, SOUTH CAROLINA NOVEMBER 6, 2021

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: October 27, 2021

To be submitted on the floor of Diocesan Convention by The Standing Committee of The Episcopal Diocese of Upper South Carolina

Subject: St. Francis of Assisi, Chapin

Whereas, after a significant time of unresolved conflict within the congregation of St. Francis of Assisi, the Standing Committee of The Episcopal Diocese of Upper South Carolina held a conference pursuant to Title III of the Canons of The Episcopal Church ("TEC Canons") on February 27, 2021 in which representatives of the congregation and The Rev. Slaven Manning participated; and

Whereas, at the March 13, 2021 meeting of The Standing Committee a resolution was passed unanimously affirming Bishop Waldo's authority in rendering a godly judgment pursuant to Title III, Canon 9, Section 15(d) of the TEC Canons, and confirmed the Bishop's authority under the canons to take such action as he, in his sole discretion, sees fit, including declaring St. Francis a mission and naming a Mission Committee willing to labor in good faith to undertake the work of reconciliation as required by the canons; and

Whereas, on March 17, 2021 and in accordance with Title III.9.14(d)(4) of the TEC Canons, The Rt. Rev. W. Andrew Waldo issued a godly judgment providing that:

- St. Francis Episcopal Church be made a mission;
- A Mission Committee be appointed to replace the Vestry;
- A new Finance Committee be constituted;
- The Rev. Alex Barron be appointed as Priest-in-Charge, pro tem;
- The congregation engage in strategic visioning for congregational life and ministry,
- The critical work of reconciliation with Richard Blackburn of the Lombard-Mennonite Peace Center; and
- Education and coaching be made available for all members in effective leadership and organizational practice.

Whereas, in April of this year Bishop Waldo received resignations from the rector and vestry, he in turn appointed a mission committee to serve with his office and their Priest-in-Charge, *pro tem*. In a little over seven months the congregation:

- Participated in strategic visioning that emphasized the focus of Evangelism, Discernment/Formation, Stewardship, regular Strategic Visioning, Confidentiality, and Episcopal Polity and Practice;
- Developed a governance model that includes Spiritual Development, Relationships, and Administration;
- Contracted with Richard Blackburn in a process of reconciliation to include engagement in interviews, as well as participation in the following seminars: *Conflict in the Church: Entrusted with the Message of Reconciliation* and *Healthy Congregations*;
- Developed a Task Force to review the Bylaws of the congregation to ensure all practices are in accordance with the Canons of The Episcopal Church and Diocese of Upper South Carolina; and
- Developed a Stewardship Program in which preliminary reports indicate a strong possibility to achieve a budget that will include a full-time Vicar.

NOW THEREFORE, be it resolved by the 99th Convention of the Episcopal Diocese of Upper South Carolina that:

1. Bishop Waldo's action in converting the Parish of St. Francis of Assisi, Chapin to mission status under Diocesan Canon VIII.10.1 effective immediately is hereby affirmed;
2. The Office of the Bishop, the Priest-in-Charge, *pro tem* and the Mission Committee shall continue its faithful work with the mission of the church, restoring all people to unity with God and each other in Christ.
3. The congregation shall remain as a mission until all requirements as a parish are met as outlined in Diocesan Canon VIII.8.1.
4. All congregations of The Episcopal Diocese of Upper South Carolina shall hold St. Francis of Assisi, Chapin in prayer and support them in their vocational calling.

Enclosures

Resolution passed by The Standing Committee, March 13, 2021

Godly Judgment rendered March 17, 2021

Appendix A

A Resolution of the Standing Committee of the Episcopal Diocese of Upper South Carolina

Whereas, St. Francis of Assisi Episcopal Church, Chapin, (“St. Francis”) was organized as a mission in 1977 and achieved parish status in 1987;

Whereas, through the years, St. Francis’ vocational purpose has centered on the life and ministry manifested by St. Francis of Assisi, and to be a loving, welcoming, worshipping community, focused on Christian education and outreach within the community of Chapin;

Whereas, one manifestation of this purpose has been the development of the St. Francis of Assisi Community Thrift Store, which was founded in 1983 to serve the larger community and help those in need;

Whereas, the St. Francis of Assisi Community Thrift Store is supported by a large team of volunteers from the congregation as well as the community at large;

Whereas, numerous clergy have served St. Francis during its existence, and at least eight out of ten clergy persons who have served at St. Francis, as Vicar, Rector, or Interim, have reported facing some degree of recurring conflict with the same minority of lay leaders and communicants;

Whereas, said conflict has tended to escalate quickly and to a high degree, and centered on issues of parish finances, governance, and attempts to control clergy responsibilities as well as congregational development;

Whereas, while the number of individuals that engaged in creating and escalating the conflict was small, the conflict itself led to widespread gossip and personal attacks on the clergy, resulting in substantial negative effects on the clergy’s ability to lead the congregation, including taking a physical and emotional toll on the clergy in some instances, and negatively affecting the community’s ability to engage in healthy mutual ministry;

Whereas, The Rev. Slaven Manning became Rector of St. Francis in July 2015;

Whereas, The Rev. Slaven Manning began to experience the same recurring conflict from the same minority of lay leaders and communicants;

Whereas, the present conflict has led to a strained relationship with some communicants and members of lay leadership and has negatively impacted the mission and ministry of the congregation;

Whereas, the issues driving the current conflict center on expectations regarding pastoral care, finances and governance, and certain instances of hostile behavior experienced by clergy, several lay leaders and communicants;

Whereas, In July 2020, in accordance with Title III Canon 9 Section 14 of The Constitution and Canons of the Episcopal Church (2018), The Rev. Slaven Manning formally requested intervention from The Rt. Rev. W. Andrew Waldo (“Bishop Waldo”);

Whereas, Bishop Waldo and Canon staff immediately began a mediation of the conflict with the Rector and the lay leadership of St. Francis, with the stated expectation that all persons labor in good faith to seek reconciliation;

Whereas, Bishop Waldo has sent a number of pastoral letters to this effect to all concerned and both he and Canon staff have had numerous meetings in furtherance of this goal;

Whereas, as part of this work, Bishop Waldo has required the following efforts by the Rector and lay leadership of St. Francis: 1) adopting norms of behavior for working together effectively and faithfully; 2) bylaw revisions to update and align the parish bylaws with the Canons of The Episcopal Church and Diocese of Upper South Carolina; 3) participation in family systems seminars through the Lombard Mennonite Peace Center; and 4) the completion of a strategic visioning process;

Whereas, the Bishop and The Rev. Canon d’Rue Hazel have also interviewed key current and former lay leaders and clergy relating to the systemic issues surrounding the history of continuing conflict;

Whereas, while most of the present leadership have engaged faithfully in this work, a minority of lay leaders and communicants have chosen not to do so and continue to escalate the level of conflict;

Whereas, in October of this year, Bishop Waldo instructed The Rev. Slaven Manning and members of the Vestry to observe a three-month sabbatical, with the next steps toward reconciliation to be determined upon its conclusion;

Whereas, as part of Bishop Waldo’s requirement that all persons labor in good faith to seek reconciliation, he has been working with the lay leadership at St. Francis to ensure that all persons serving in lay leadership are committed fully and faithfully as stewards of the mission and ministry of St. Francis of Assisi Episcopal Church, Chapin;

Whereas, the Finance Committee has reported to the Bishop that certain members are reducing or withholding their pledge;

Whereas, interviewees have reported that some in lay leadership and some who wish to serve as lay leaders have encouraged other members to reduce or withhold their pledge , in an effort to force The Rev. Slaven Manning to resign;

Whereas, Bishop Waldo has requested certain parish financial records to confirm that those currently in leadership and those who seek lay leadership at St. Francis are laboring in good faith to seek reconciliation by being faithful stewards of the mission and ministry of St. Francis during the reconciliation process, including making an appropriate financial pledge;

Whereas, despite Bishop Waldo's repeated reasonable requests, and after giving assurances of confidentiality and discretion, the lay leadership of St. Francis has refused to honor said legitimate requests;

Whereas, Bishop Waldo has become aware of certain attempted actions by the lay leadership of St. Francis in the absence of the Rector to disregard and circumvent St. Francis' bylaw provisions relating to the proper roles of the Rector and the Vestry in naming and affirming Wardens;

Whereas, Bishop Waldo has concluded that given the foregoing, it has become clear that there is a minority of lay leaders, communicants, and those seeking to serve as lay leaders who have no intention of abiding by his direction to labor in good faith to seek reconciliation for the good of all involved, and Bishop Waldo has also concluded that, regrettably, additional canonical action may be required;

Therefore, be it resolved, that the Standing Committee of the Episcopal Diocese of Upper South Carolina hereby affirms Bishop Waldo's authority to render a godly judgment pursuant to Title III, Canon 9, Section 15(d), and confirms the Bishop's authority under the canons to take such action as he, in his sole discretion, sees fit, including declaring St. Francis a mission and naming a Mission Committee willing to labor in good faith to undertake the work of reconciliation as required by the canons. Should Bishop Waldo be forced to take such an action, the Standing Committee notes that the canons of the Episcopal Diocese of Upper South Carolina require Bishop Waldo to report said action to the next regularly scheduled Diocesan Convention for confirmation thereof.

Passed by Standing Committee March 13, 2021

THE EPISCOPAL DIOCESE OF UPPER SOUTH CAROLINA

The Rt. Rev. W. Andrew Waldo

17 March 2021

Dear Rector and Vestry of St. Francis of Assisi,

"So if anyone is in Christ, there is a new creation: everything old has passed away; see, everything has become new! All this is from God, who reconciled us to himself through Christ, and has given us the ministry of reconciliation; that is, in Christ God was reconciling the world to himself, not counting their trespasses against them, and entrusting the message of reconciliation to us." –2 Corinthians 5:17-19

In times of vitality, growth and joy, these familiar words from the apostle Paul comfort and assure us in our faith and on our journey towards Christ. It is an eternally hopeful prospect and promise to contemplate that we, as souls who belong to Christ, could be shaped by, around, and in such reconciling love.

When we are broken with frustration and conflict, these same words seem to describe a distant, unattainable dream, seen through a glass, and dimly (1 Cor 13:12). Committing to and striving for reconciliation seems hard and dangerous. We wonder if it is even worth the risk of throwing ourselves against a glass too thick for us to break, or if we try, we fear that we may be cut, scarred, or killed in the effort.

And yet.

Reconciliation is the challenging but transformative ministry to which Christ calls us. Christ calls us not to set our minds on earthly things, but on heavenly things. Christ calls us to put at risk any return to a previous way of being and doing for something better, something more Christ-like. Paul's very next words from the passage above define our mission: "So we are ambassadors for Christ, since God is making his appeal through us..." (2 Cor 5:20). It is an appeal to love, because "Love is patient; love is kind; love is not envious or boastful or arrogant or rude. It does not insist on its own way; it is not irritable or resentful; it does not rejoice in wrongdoing, but rejoices in the truth. It bears all things, believes all things, hopes all things, endures all things." We have to be willing to "lose our life in order to save it," as Jesus tells his hearers over and over again.

After working with you throughout this past year, it has become clear to me that impatience, severity, insistence on one's own way, irritability, blaming, and innuendo have too commonly characterized moments and seasons in the current conflict at St. Francis of Assisi. Not by all people; not by only one "side;" and not at all times by any one person. Love has been scarce and elusive, though not absent. I consciously refrain here from singling out any individuals, ordained or lay, acknowledging that responsibility for the conflict and its escalation is shared to larger and smaller degrees, and it would not solve anything to do so. After convening a Title III conference at the request of the wardens and vestry of St. Francis and listening to all concerned, the Standing Committee has reached the same conclusion.

It has become clear that the clergy and lay leadership of the St. Francis community is stuck in its hope for a return to the “way things used to be.” The words and methods of Paul and the message of forgiveness, love and mercy of God in Christ Jesus all require deep commitment and hard work. These words have been heard, studied and preached at St. Francis for many years. But your leadership has instead looked, in this instance and in several previous rectors’ tenures, for a quick, direct “fix” in the midst of conflicts resolvable only by the willing embrace of processes designed to encourage mutual responsibility and reconciliation. *Deeper* and more durable solutions, and many opportunities to implement them, have been evident with every renewal of the baptismal covenant at St. Francis. The seeds of the hard work of discipleship and reconciliation—the letting go of anger and frustration, the forgiving seven-times-seven, the humility, the striving to seek Christ in all persons, the respect for the dignity of every human being—have too often fallen on rocky ground, where they have failed to take root.

Why have these seeds failed to take root? Some examples of the rocky ground:

“We can solve this ourselves.” I’ve pointed to relevant scriptures for you to undertake just that.

“This is *our/my* church!” But it is not; it is God’s Church.

There is also a paradoxical question: “Why does ‘The Diocese’¹ have to be involved?” The paradox is found in the dueling expectations between wanting “the Diocese” to act in particular ways (the quick “fix”) and not wanting the Diocese to be involved at all. The Diocese is involved because that is how the Episcopal Church is organized. The Diocese, not the congregation, is the most local expression of the Church in our polity. The Bishop’s chair in each congregation should be occupied every Sunday by the Rector, Vicar, Priest-in-Charge, or Supply Priest as the Bishop’s representative in that place (though mistakenly, out of a desire not to seem presumptuous, not all clergy do so.) By becoming Episcopalian, we all—including the Bishop—submit to a particular way of ordering ourselves. In that ordering, the Bishop has oversight of every congregation in his or her charge; not to micromanage, but to ensure that each congregation is faithful to the baptismal vows we all renew at least annually.

The Bishop’s most important task is to ensure, as far as is possible, that each congregation embraces truth, love, forgiveness and mercy as the *beginning* of reconciliation, and casts off gossip, deception, self-righteous indignation and blaming as destructive to life together in Christ. The prayers for a newly married couple in the Book of Common Prayer include these petitions: “Give them grace, when they hurt each other, to recognize and acknowledge their fault, and to seek each other’s forgiveness and yours...Make their life together a sign of Christ’s love to this sinful and broken world, that unity may overcome estrangement, forgiveness heal guilt, and joy conquer despair.” This is a godly charge for *all* Christian relationships at all times.

When influential members of a congregation fail to listen to or hear or heed the many strategies scripture offers for God’s people to reconcile with one another, the Bishop’s task is to re-order the leadership in a way that other leaders—those who are not currently invested in

¹ While this term is inclusive of all clergy, leaders, members, congregations, commissions and institutions in this judicatory, members of the St. Francis Vestry clearly indicated on a Zoom vestry meeting that they use the term primarily to refer to the Bishop and his staff. The Bishop, his staff and the Standing Committee use the term in its fully inclusive sense.

maintaining the status quo and who haven't been as directly hurt or offended in the conflict—can bring their voices, their love and their sight to the necessary re-visioning.

While the details may be different, the same behaviors have characterized leadership-clergy conflicts at St. Francis in several previous decades. It is clear to me and to the Standing Committee that this moment is a turning point in the life of this congregation: a fresh opportunity to let go, to listen in new ways, to break with the status quo and make substantive changes from currently-practiced norms of communication, leadership development, and conflict resolution. This moment presents a fresh opportunity to become the promised new creation.

As I have written before, we cannot, and should not, accept “the way things used to be” as the driving vision for St. Francis’ future. Instead, we look for and fully embrace God’s new way.

Therefore, according to Title III.9.14(d)(4) of the Constitution and Canons of the Episcopal Church, my godly judgment is as follows:

1. That St. Francis of Assisi Episcopal Church, Chapin, South Carolina shall be made a Mission of the Diocese;
2. That its current Vestry and Wardens, and other Officers shall be relieved of their current roles and responsibilities;
3. That the current lay leadership shall be replaced by a Mission Committee and Officers appointed by the Ecclesiastical Authority (some among current Vestry members may be reappointed to the Mission Committee);
4. That the Rector, the Rev. Slaven Manning, shall tender his resignation, with severance to be paid by St. Francis of Assisi equaling one month’s salary plus pension and insurance benefits per year of service as Rector, prorated.
5. That all resignations shall be effective upon the execution of the severance agreement, or five days after receipt of this letter, whichever is earlier.
6. That the Rev. Alex Barron shall be appointed Priest-in-Charge *Pro Tem* while a longer-term Interim Rector is secured and the Mission Committee organizes and begins its service;
7. Finally, it is my godly judgment that members of the St. Francis of Assisi Finance Committee shall also tender their resignations, with its new membership to be appointed by the Ecclesiastical Authority.

The Standing Committee of the Diocese unanimously concurred with my judgment to make St. Francis a Mission of the Diocese at its 13 March, 2021 meeting.

This decision takes nothing practical out of the hands of the people of St. Francis of Assisi. The new leadership will undertake all the tasks of strategic visioning and provision for the life and ministry of the congregation. The work of establishing and fully implementing healthy norms for congregational life and leadership will belong to the Mission Committee, including the ongoing and critical work of reconciliation. We have contracted with the Rev. Richard Blackburn of the Lombard-Mennonite Peace Center to work with the new Mission Committee

and the entire congregation—to educate and coach all members in effective leadership, organizational practice, and to further the process of reconciliation and healing.

While some may, in anger or frustration over this decision, be tempted to leave the congregation, or to withhold, or continue to withhold, their financial support of St. Francis, it is important to remember that our money is among the most powerful signs of our commitment to God—“All things come of thee, O LORD, and of thine own have we given thee”—and to God’s mission of reconciliation. God’s mission at St. Francis will especially need your support in this time.

In conclusion, while I understand that some may view these decisions as punishment or even personal, please be assured that they are neither of those things. After much prayer, discernment and discussion, the Standing Committee and I are in complete agreement in our assessment of the current situation and that this is the best way forward for the long-term health of St. Francis. We, and your Diocesan family, are also fully committed to walking with and supporting the people of St. Francis on this journey of transformation, reconciliation, and, ultimately, renewal.

With prayers for the work ahead, I remain

Your brother in Christ,

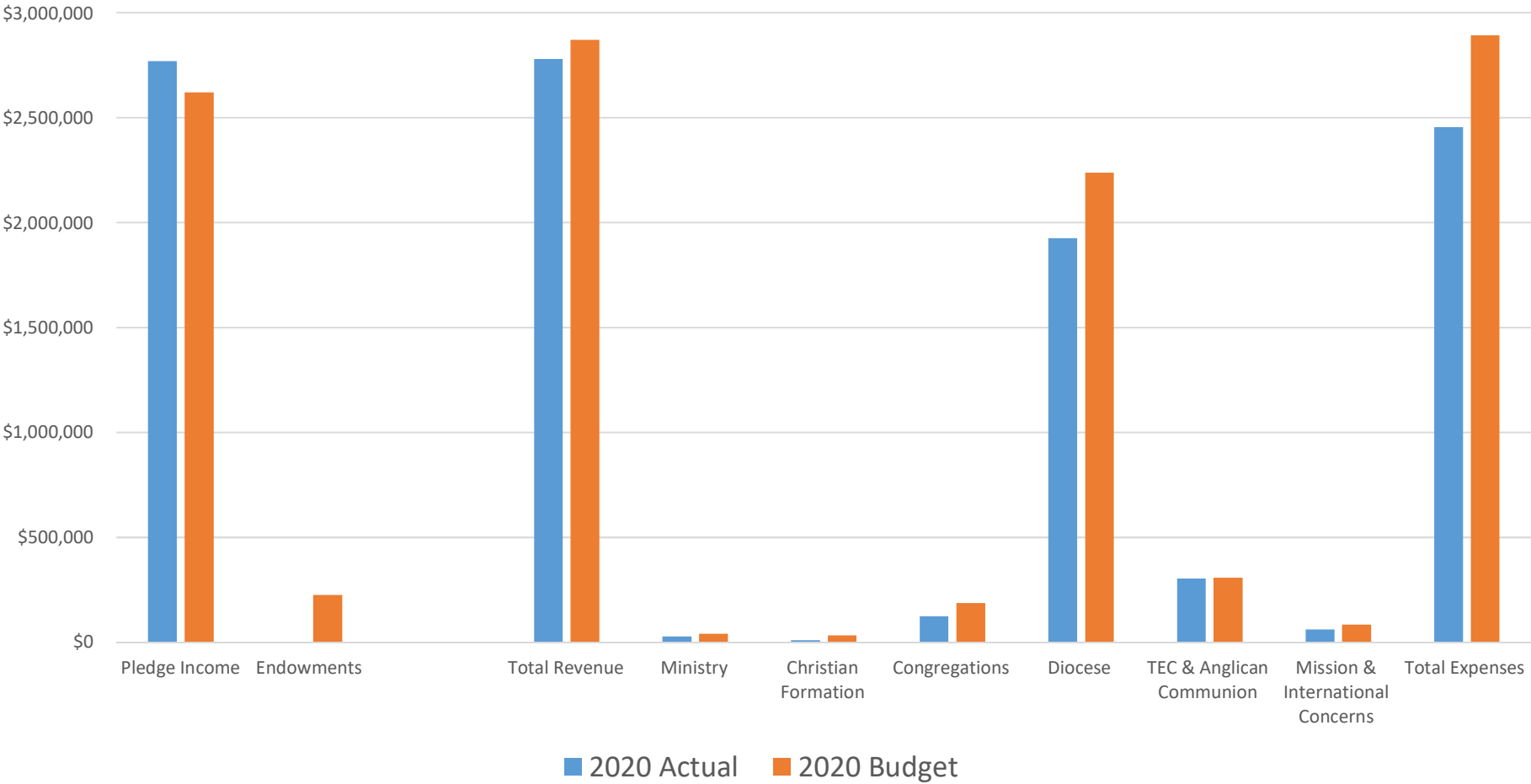
A handwritten signature in blue ink, appearing to read "Andrew Waldo", with a small blue cross symbol to the left.

The Rt. Rev. Andrew Waldo
The Episcopal Diocese of Upper South Carolina

Overview of 2020 Actual Expenditures Compared to 2020 SOM

		2020 Actual	2020 Budget	% of Budget
	<u>Diocesan Resources (Income)</u>			
3	Episcopal Pledge Income (16%)	\$2,771,625	\$2,620,000	105.79%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$225,508	0.00%
9				
10	Total Revenue	\$2,781,559	\$2,870,508	96.90%
	<u>Expenses:</u>			
26	Commission on Ministry	\$28,376	\$40,162	70.65%
37	Commission on Christian Formation	\$10,543	\$33,000	31.95%
56	Commission on Congregations	\$124,782	\$187,750	66.46%
99	Commission on the Diocese	\$1,925,667	\$2,237,296	86.07%
105	Commission on TEC & Anglican Communion	\$304,758	\$307,830	99.00%
117	Commission on Mission & International Concerns	\$60,266	\$85,050	70.859%
118	Total Expenses	\$2,454,391	\$2,891,088	84.90%
119	Net (Deficit) / Surplus	\$327,168	(\$20,580)	

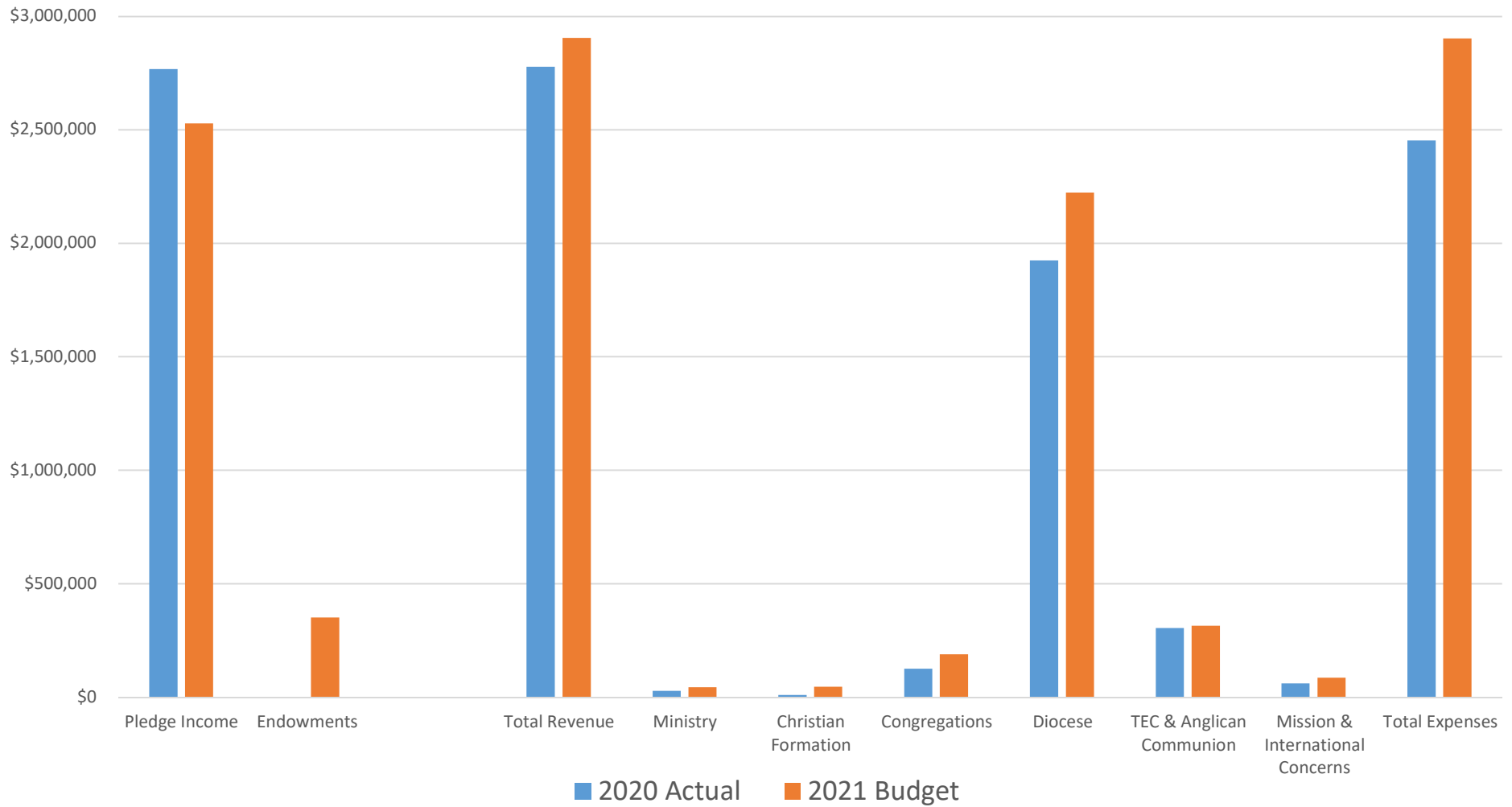
Overview of 2020 Actual Expenditures
Compared to 2020 SOM



Overview of 2020 Actual Expenditures Compared to 2021 SOM

		2020 Actual	Actual / Actual Total	2021 Budget	Budget / Budget Total
	<u>Diocesan Resources (Income)</u>				
	Episcopal Pledge Income (16%)	\$2,768,875	99.64%	\$2,529,465	87.06%
	Support for Theological Ed. (Endowment)	\$8,495	0.31%	\$0	0.00%
	Continuing Ed. for Clergy (Endowment)	\$1,440	0.05%	\$0	0.00%
	Withdrawals from Diocesan Endowment Portfolio	\$0	0.00%	\$351,014	12.08%
	Expenditure of Restricted & Designated Funds	\$0	0.00%	\$0	0.00%
	Bishop's Permanent Fund (Endowment) (2020) /Emergency Congregational Support (2021)	\$0	0.00%	\$25,000	0.86%
	Total Revenue	\$2,778,809		\$2,905,479	
	<u>Expenses:</u>				
	Commission on Ministry	\$28,376	1.02%	\$44,000	1.51%
	Commission on Christian Formation	\$10,543	0.38%	\$45,850	1.58%
	Commission on Congregations	\$124,782	4.49%	\$188,248	6.48%
	Commission on the Diocese	\$1,925,667	69.30%	\$2,223,626	76.53%
	Commission on TEC & Anglican Communion	\$304,758	10.97%	\$315,019	10.84%
	Commission on Mission & International Concerns	\$60,266	2.17%	\$86,500	2.98%
	Total Expenses	\$2,454,391		\$2,903,243	
	Net (Deficit) / Surplus	\$324,418	11.67%	\$2,236	0.00%

Overview of 2020 Actual Compared to 2021 SOM



September 2021 SOM Summary Report

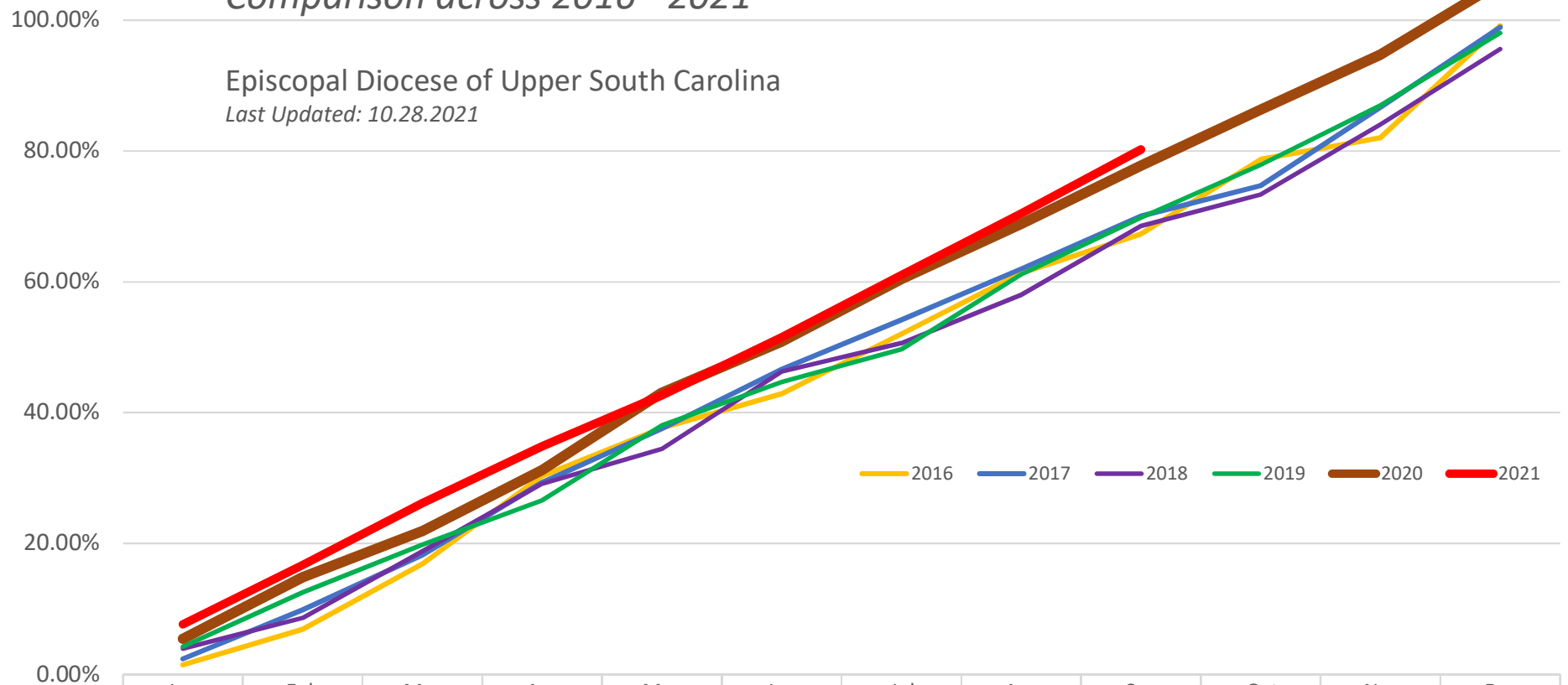
		September	Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Diocesan Resources (Income)</u>							
3	Episcopal Pledge Income (16%)	\$247,132	\$210,789	\$2,029,364	\$1,897,098.75	106.97%	\$2,529,465	80.23%
4	Support for Theological Ed. (Endowment)	\$431	\$0	\$952	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$73	\$0	\$161	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$29,251.17	\$0	\$263,261	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	\$18,750	0.00%	\$25,000	0.00%
	Total Revenue	\$247,636	\$242,123	\$2,030,478	\$2,179,109	93.18%	\$2,905,479	69.88%
	<u>Diocesan Expenses</u>							
26	Commission on Ministry	\$0	\$3,667	\$13,067	\$33,000	39.60%	\$44,000	29.70%
37	Commission on Christian Formation	(\$722)	\$3,821	(\$548)	\$34,388	-1.59%	\$45,850	-1.20%
56	Commission on Congregations	\$65,342	\$15,687	\$122,847	\$141,186	87.01%	\$188,248	65.26%
99	Commission on the Diocese	\$148,197	\$185,302	\$1,455,870	\$1,667,720	87.30%	\$2,223,626	65.47%
105	Commission on TEC & Anglican Communion	\$26,076	\$26,252	\$234,683	\$236,264	99.33%	\$315,019	74.50%
117	Commission on Mission & International Concerns	(\$290)	\$7,208	\$57,706	\$64,875	88.95%	\$86,500	66.71%
118	Total Expenses	\$238,603	\$241,937	\$1,883,625	\$2,177,432	86.51%	\$2,903,243	64.88%
119	Net (Deficit) / Surplus	\$9,033	\$186	\$146,853	\$1,677		\$2,236	

Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2016 - 2021

Episcopal Diocese of Upper South Carolina

Last Updated: 10.28.2021



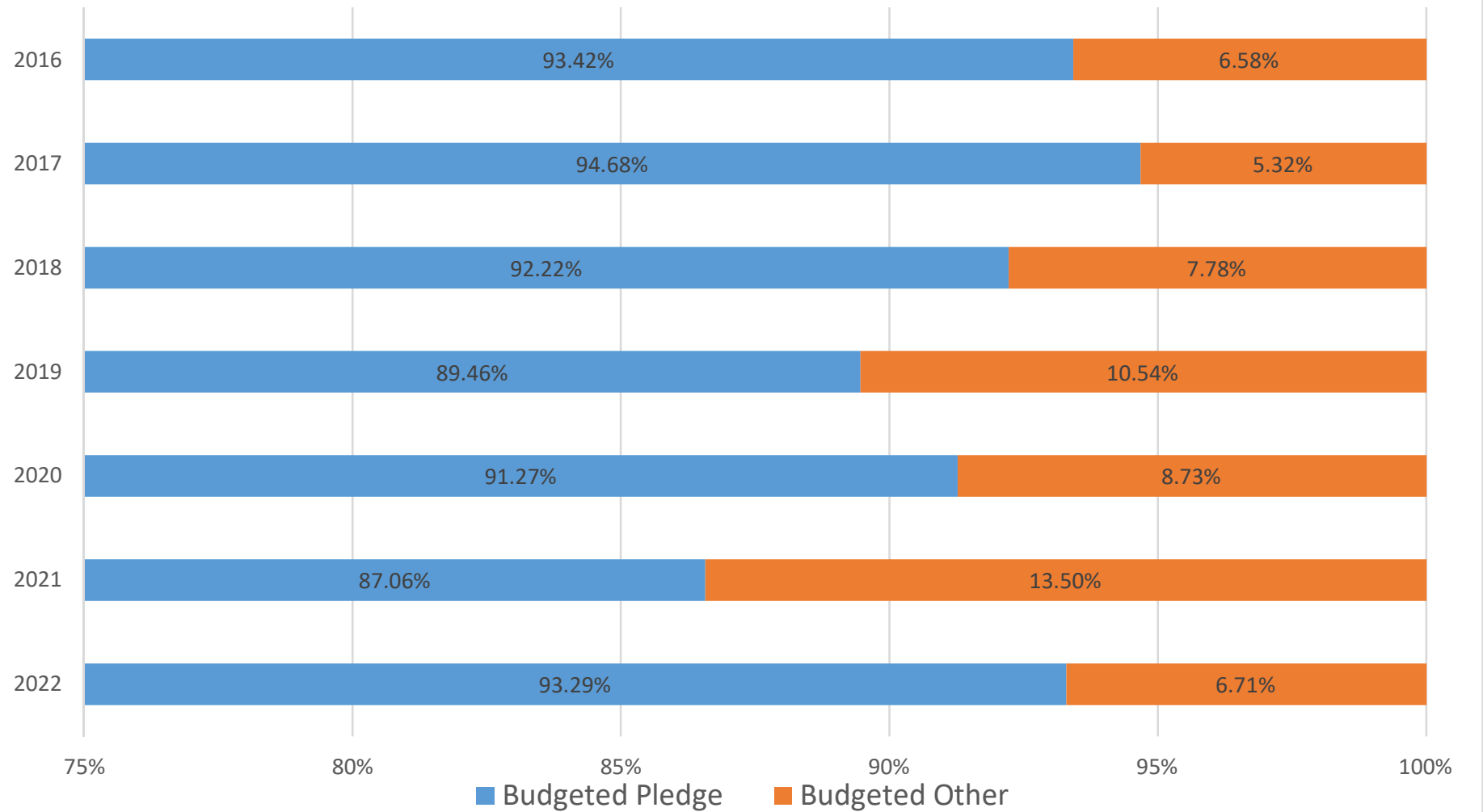
	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2016	1.46%	6.91%	16.88%	30.33%	37.66%	42.89%	52.02%	61.33%	67.31%	78.74%	82.05%	99.13%
2017	2.37%	9.87%	18.27%	29.33%	37.56%	46.62%	54.20%	61.97%	70.07%	74.70%	86.67%	98.92%
2018	3.93%	8.63%	18.81%	29.15%	34.48%	46.29%	50.63%	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%			

	<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021	Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2020 SOM
	DIOCESAN RESOURCES				
1	Episcopal Pledge Assessments		\$3,300,000	\$3,527,433	\$227,433
2	Less: Allowance for Unaccepted Pledge Assessments		(\$770,535)	(\$872,433)	(\$101,898)
3	Episcopal Pledge Income	A	\$2,529,465	\$2,655,000	\$125,535
4	Support for Theological Ed. (Endowment)		\$0	\$8,400	\$8,400
5	Continuing Ed. for Clergy (Endowment)		\$0	\$1,400	\$1,400
6	Income from Diocesan Endowment Portfolio	B	\$351,014	\$66,090	(\$284,924)
7	30% Surplus from 2020		\$0	\$75,000	\$75,000
8	Episcopal Dioceses Grant (projected)		\$0	\$40,000	\$40,000
9	Emergency Congregational Support	C	\$25,000	\$0	(\$25,000)
	Total Resources		\$2,905,479	\$2,845,890	(\$59,589)
	DIOCESAN EXPENSES				
26	Commission on Ministry		\$44,000	\$34,000	(\$10,000)
27	Commission on Christian Formation		\$45,850	\$44,400	(\$1,450)
28	Commission for Congregations		\$188,248	\$154,200	(\$34,048)
57	Commission on Convocations		\$0	\$0	\$0
99	Commission on the Diocese		\$2,223,626	\$2,250,076	\$26,450
105	Comm. on The Episcopal Church & The Anglican Communion		\$315,019	\$321,364	\$6,345
117	Commission on Mission & International Concerns		\$86,500	\$90,850	\$4,350
118	Total Expenses		\$2,903,243	\$2,894,890	(\$8,353)
119	Net (Deficit) / Surplus		\$2,236	(\$49,000)	(\$51,236)

Pledge Income to Total Resources Budgeted and Expended

	Budgeted Pledge	Budgeted Other	Total Budgeted	Actual Pledge	Actual Other	Total Actual
2022	93.29%	6.71%	\$ 2,845,890			
2021	87.06%	13.50%	\$ 2,905,479			
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 2016 - 2022



**The Episcopal Diocese of Upper South Carolina
Statement of Mission Summary Report
December 2020**

		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%)	\$290,273	\$218,333	\$2,771,625	\$2,620,000	105.79%	\$2,620,000	105.79%
4	Support for Theological Ed. (Endowment)	\$5,241	\$0	\$8,495	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$888	\$0	\$1,440	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	(\$530)	\$18,792	\$0	\$225,508	0.00%	\$225,508	0.00%
7	Expenditure of Restricted & Designated Funds	\$0	\$0	\$0	\$0	0.00%	\$0	0.00%
8	Bishop's Permanent Fund (Endowment)	\$0	\$2,083	\$0	\$25,000	0.00%	\$25,000	0.00%
9								
10	Total Revenue	\$295,872	\$239,209	\$2,781,559	\$2,870,508	96.90%	\$2,870,508	96.90%
	Expenses:							
26	Commission on Ministry	\$18,208	\$3,347	\$28,376	\$40,162	70.65%	\$40,162	70.65%
37	Commission on Christian Formation	\$2,792	\$2,750	\$10,543	\$33,000	31.95%	\$33,000	31.95%
56	Commission on Congregations	\$14,323	\$15,646	\$124,782	\$187,750	66.46%	\$187,750	66.46%
99	Commission on the Diocese	\$47,589	\$186,441	\$1,925,667	\$2,237,296	86.07%	\$2,237,296	86.07%
105	Commission on TEC & Anglican Communion	\$25,273	\$25,653	\$304,758	\$307,830	99.00%	\$307,830	99.00%
117	Commission on Mission & International Concerns	\$6,389	\$7,088	\$60,266	\$85,050	70.86%	\$85,050	70.86%
118	Total Expenses	\$114,574	\$240,924	\$2,454,391	\$2,891,088	84.90%	\$2,891,088	84.90%
119	Net (over)/under	\$181,298	(\$1,715)	\$327,168	(\$20,580)		(\$20,580)	
	Note: Health Ins. Is prepaid a month in advance.							

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2020

		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%)	\$290,273	\$218,333	132.95%	\$2,771,625	\$2,620,000	105.79%	\$2,620,000	105.79%
4	Support for Theological Ed. (Endowment)	\$5,241	\$0	0.00%	\$8,495	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$888	\$0	0.00%	\$1,440	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	(\$530)	\$18,792	-2.82%	\$0	\$225,508	0.00%	\$225,508	0.00%
7	Expenditure of Restricted & Designated Funds	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
8	Bishop's Permanent Fund (Endowment)	\$0	\$2,083	0.00%	\$0	\$25,000	0.00%	\$25,000	0.00%
9									
	Total Revenue	\$295,872	\$239,209	123.69%	\$2,781,559	\$2,870,508	96.90%	\$2,870,508	96.90%
	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	\$0	\$83	0.00%	(\$278)	\$1,000	-27.81%	\$1,000	-27.81%
12	Fall Clergy Conference	\$0	\$83	0.00%	(\$125)	\$1,000	-12.50%	\$1,000	-12.50%
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	\$104	0.00%	\$850	\$1,250	68.00%	\$1,250	68.00%
17	Committee for Retired Clergy/Spouses	\$0	\$125	0.00%	\$555	\$1,500	37.00%	\$1,500	37.00%
	Discernment and Theological Ed.								
18	Vocational Discernment	\$140	\$108	129.23%	\$1,403	\$1,300	107.94%	\$1,300	107.94%
19	Deacon Formation Program	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
20	Seminarian Insurance	\$7,836	\$1,551	505.22%	\$12,206	\$18,612	65.58%	\$18,612	65.58%
21	Theological Education Assistance	\$2,850	\$667	427.50%	\$5,192	\$8,000	64.90%	\$8,000	64.90%
22	NEW - Seminarian Retreat	\$6,110	\$358	1705.12%	\$6,300	\$4,300	146.52%	\$4,300	146.52%
23	Seminarian Travel	\$0	\$125	0.00%	\$0	\$1,500	0.00%	\$1,500	0.00%
24	Seminarian Emergency Funds	\$1,272	\$42	3052.80%	\$1,272	\$500	254.40%	\$500	254.40%
25	New - Seminarian Book Funds								
26	Commission on Ministry	\$18,208	\$3,347	544.04%	\$28,376	\$40,162	70.65%	\$40,162	70.65%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2020

		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	\$3,000	\$250	1200.00%	\$3,000	\$3,000	100.00%	\$3,000	100.00%
28	Cursillo	\$0	\$250	0.00%	\$160	\$3,000	5.33%	\$3,000	5.33%
29	Vocare	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
30	Children's Ministry	(\$56)	\$75	-75.31%	\$26	\$900	2.85%	\$900	2.85%
	General Children's Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	5th Grade Bridge Retreat	(\$56)	\$75	-75.31%	\$26	\$900	2.85%	\$900	2.85%
31	Youth Ministry	\$86	\$1,900	4.53%	\$4,880	\$22,800	21.40%	\$22,800	21.40%
	Happening	(\$110)	\$1,046	-10.52%	\$508	\$12,550	4.05%	\$12,550	4.05%
	General Youth Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: Middle School Fall Lock-in	\$0	\$38	0.00%	\$0	\$450	0.00%	\$450	0.00%
	YM: New Beginnings	\$196	\$98	200.21%	\$81	\$1,175	6.86%	\$1,175	6.86%
	YM: High School Spring Retreat	\$0	\$600	0.00%	\$4,153	\$7,200	57.68%	\$7,200	57.68%
	YM: High School Fall Lock-in	\$0	\$38	0.00%	(\$239)	\$450	-53.04%	\$450	-53.04%
	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	\$31	0.00%	\$0	\$375	0.00%	\$375	0.00%
	YM: DYLC: Dioc. Youth Lead. Comm.	\$0	\$50	0.00%	\$377	\$600.00	62.76%	\$600	62.76%
32	Adult Formation Ministry	(\$238)	\$129.17	-183.87%	\$727	\$1,550.00	46.93%	\$1,550	46.93%
	Safe Church Trainers	\$0	\$85	0.00%	\$0	\$1,023	0.00%	\$1,023	0.00%
	Adult Formation Ministry	(\$238)	\$44	-540.80%	\$727	\$527	138.02%	\$527	138.02%
	Safe Church Trainers <i>*Now included in Adult Formation*</i>								
33	Community of Hope	\$0	\$0	0.00%	\$0	\$0	#DIV/0!	\$0	0.00%
34	Education for Ministry	\$0	\$146	0.00%	\$1,750	\$1,750	100.00%	\$1,750	100.00%
35	Episcopal Church Women	\$0	\$0	0.00%	\$0	\$0.00	#DIV/0!	\$0	0.00%
36	Commission on Christian Formation	\$2,792	\$2,750	101.53%	\$10,543	\$33,000	31.95%	\$33,000	31.95%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2020

		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>									
37	Holy Cross, Simpsonville - Hispanic Ministries	\$0	\$2,167	0.00%	\$0	\$26,000	0.00%	\$26,000	0.00%
38	St. Francis, Greenville - Hispanic Ministries	\$2,121	\$2,292	92.56%	\$27,500	\$27,500	100.00%	\$27,500	100.00%
<i>African American Ministries</i>									
39	St. Thomas, Eastover	\$313	\$313	100.00%	\$3,750	\$3,750	100.00%	\$3,750	100.00%
<i>New Ways of Being Church</i>									
40	Church of the Cross, Columbia	\$1,292	\$1,292	100.00%	\$15,500	\$15,500	100.00%	\$15,500	100.00%
41	Diocesan Curate Support	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
42	Young Adult Communities: Campus Ministries	\$7,056	\$5,000	141.12%	\$33,797	\$60,000	56.33%	\$60,000	56.33%
	YAM: Canterbury Communities (General Expenses)	\$7,056	\$353	1999.81%	\$11,242	\$4,234	265.52%	\$4,234	265.52%
	YAM: Clemson Canterbury	\$0	\$210	0.00%	\$1,408	\$2,520	55.86%	\$2,520	55.86%
	YAM: Furman Canterbury	\$0	\$138	0.00%	\$482	\$1,650	29.23%	\$1,650	29.23%
	YAM: Presbyterian Coll. Canterbury	\$0	\$128	0.00%	\$247	\$1,540	16.05%	\$1,540	16.05%
	YAM: Univ. S.C. Canterbury	\$0	\$440	0.00%	\$3,567	\$5,285	67.50%	\$5,285	67.50%
	YAM: Rock Hill Canterbury	\$0	\$1,391	0.00%	\$16,717	\$16,691	100.16%	\$16,691	100.16%
	YAM: Spartanburg Canterbury	\$0	\$90	0.00%	\$134	\$1,080	12.38%	\$1,080	12.38%
	YAM: Clemson Canterbury Stipend	\$1,600	\$500	320.00%	\$3,748	\$6,000	62.47%	\$6,000	62.47%
	YAM: Furman Canterbury Stipend	\$1,600	\$250	640.00%	\$3,200	\$3,000	106.67%	\$3,000	106.67%
	YAM: Presbyterian Coll. Canterbury Stipend	\$1,600	\$250	640.00%	\$2,400	\$3,000	80.00%	\$3,000	80.00%
	YAM: Univ. S.C. Canterbury Stipend	\$1,600	\$500	320.00%	\$5,300	\$6,000	88.33%	\$6,000	88.33%
	YAM: Rock Hill Canterbury Stipend	\$1,600	\$250	640.00%	\$2,400	\$3,000	80.00%	\$3,000	80.00%
	YAM: Spartanburg Canterbury Stipend	\$800	\$500	160.00%	\$4,500	\$6,000	75.00%	\$6,000	75.00%
43	Episcopal Service Corps	\$0	\$833	0.00%	\$0	\$10,000	0.00%	\$10,000	0.00%
<i>Continuing Support</i>									
44	St. Augustine of Canterbury, Aiken	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
45	All Saints', Beech Island	\$375	\$375	100.00%	\$4,500	\$4,500	100.00%	\$4,500	100.00%
46	St. Christopher's, Spartanburg	\$1,063	\$1,063	100.00%	\$12,750	\$12,750	100.00%	\$12,750	100.00%
47	New- St. Bartholomew's, North Augusta	\$1,500	\$1,500	100.00%	\$18,000	\$18,000	100.00%	\$18,000	100.00%
48	Epiphany, Spartanburg	\$604	\$604	100.00%	\$7,250	\$7,250	100.00%	\$7,250	100.00%
<i>Congregational & Stewardship Development</i>									
49	Congregational Workshops	\$0	\$63	0.00%	\$485	\$750	64.61%	\$750	64.61%
50	Congregational Vitality and Sustainability	\$0	\$21	0.00%	\$0	\$250	0.00%	\$250	0.00%
51	Stewardship (TENS membership)	\$0	\$125	0.00%	\$1,250	\$1,500	83.33%	\$1,500	83.33%
52	Commission on Congregations	\$14,323	\$15,646	91.55%	\$124,782	\$187,750	66.46%	\$187,750	66.46%

The Episcopal Diocese of Upper South Carolina
Statement of Mission Report
December 2020

		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission on Convocations</u>								
53	Commission on Convocations	\$0	\$0		\$0	\$0		\$0	
	<u>Commission on the Diocese</u>								
	Clergy Insurance								
54	Group Long-Term Disability	\$2,388	\$1,750	136.46%	\$15,895	\$21,000	75.69%	\$21,000	75.69%
55	Group Insurance - Active Clergy	(\$37,524)	\$59,820	-62.73%	\$619,783	\$717,840	86.34%	\$717,840	86.34%
56	Group Insurance - Retired	(\$2,511)	\$10,417	-24.11%	\$100,807	\$125,000	80.65%	\$125,000	80.65%
57	Subtotal - Clergy Insurance	(\$37,647)	\$71,987	-52.30%	\$736,486	\$863,840	85.26%	\$863,840	85.26%
	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	\$1,750	0.00%	\$21,924	\$21,000	104.40%	\$21,000	104.40%
61	Bishop's Staff Stipends & Benefits	\$48,420	\$65,417	74.02%	\$790,210	\$785,000	100.66%	\$785,000	100.66%
62	Staff FICA	\$2,082	\$2,083	99.94%	\$22,797	\$25,000	91.19%	\$25,000	91.19%
63	Short-term disability	\$0	\$200	0.00%	\$1,342	\$2,400	55.90%	\$2,400	55.90%
64	Episcopal Visitations	\$0	\$625	0.00%	\$0	\$7,500	0.00%	\$7,500	0.00%
65	Diocesan House Admin. Expenses	\$6,152	\$10,333.33	59.54%	\$87,179	\$124,000.00	70.31%	\$124,000	70.31%
66	Bishop Travel, Continuing Ed. & Hospitality	\$291	\$2,500	11.62%	\$3,072	\$30,000	10.24%	\$30,000	10.24%
67	Canon Staff Travel	\$147	\$2,292	6.42%	\$10,334	\$27,500	37.58%	\$27,500	37.58%
68	Non-Canon Staff Conferences/Continuing Ed/Travel	\$0	\$833	0.00%	\$634	\$10,000	6.34%	\$10,000	6.34%
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%	\$0	\$10,000	0.00%	\$10,000	0.00%
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)	\$386	\$2,083	18.54%	\$8,969	\$25,000	35.88%	\$25,000	35.88%
73	Subtotal - Office of the Bishop	\$74,133	\$107,255	69.12%	\$1,146,318	\$1,287,056	89.07%	\$1,287,056	89.07%
	Bishop's Events:								
74	Clergy Business Day	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
75	Ordinations - Diaconate	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
76	Ordinations - Priesthood	\$0	\$83	0.00%	\$64	\$1,000	6.41%	\$1,000	6.41%
77	Ordinations - Transitional Diaconate	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
78	Renewal of Vows	\$0	\$125	0.00%	\$279	\$1,500	18.57%	\$1,500	18.57%
79	Celebrations of New Ministries	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
80	Subtotal - Bishop's Events	\$0	\$250	0.00%	\$343	\$3,000	11.42%	\$3,000	11.42%

The Episcopal Diocese of Upper South Carolina
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		December	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	Diocesan Institutions								
81	All Saints', Clinton for facilities use	\$0	\$333.33	0.00%	\$2,333	\$4,000	58.33%	\$4,000	58.33%
82	Still Hopes	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
83	Finlay House	\$0	\$42	0.00%	\$500	\$500	100.00%	\$500	100.00%
84	Gravatt	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
85	Univ. of the South School of Theology (Sewanee)	\$0	\$333	0.00%	\$4,000	\$4,000	100.00%	\$4,000	100.00%
86	Voorhees	\$0	\$125	0.00%	\$1,500	\$1,500	100.00%	\$1,500	100.00%
87	Heathwood Hall Episcopal School	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
88	Kanuga	\$0	\$83	0.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
89	Subtotal - Diocesan Institutions	\$0	\$1,167	0.00%	\$12,333	\$14,000	88.10%	\$14,000	88.10%
	Diocesan Convention								
90	Diocesan Convention - Leadership & Business Days	\$1,103	\$1,250.00	88.24%	\$6,242	\$15,000.00	41.62%	\$15,000	41.62%
91	Convention Secretary	\$200	\$200	100.00%	\$2,400	\$2,400	100.00%	\$2,400	100.00%
92	Subtotal - Diocesan Convention	\$1,303	\$1,450	188.24%	\$8,642	\$17,400	141.62%	\$17,400	49.67%
	Diocesan Executive Council								
93	Diocesan Executive Council	\$0	\$167	0.00%	\$158	\$2,000	7.88%	\$2,000	7.88%
94	D.E.C. Orientation & Planning	\$0	\$250	0.00%	\$1,384	\$3,000	46.12%	\$3,000	46.12%
95	Audit & Accounting Services	\$9,800	\$1,667	588.00%	\$9,800	\$20,000	49.00%	\$20,000	49.00%
96	Insurance - Property, Liability, Bond	\$0	\$1,583	0.00%	\$9,854	\$19,000	51.86%	\$19,000	51.86%
97	Real Property Expenses	\$0	\$417	0.00%	\$0	\$5,000	0.00%	\$5,000	0.00%
98	NEW - Diocesan Chancellors	\$0	\$250	0.00%	\$350	\$3,000	11.67%	\$3,000	11.67%
99	Subtotal - Diocesan Executive Council	\$9,800	\$4,333	226.15%	\$21,545	\$52,000	41.43%	\$52,000	41.43%
100	Commission on the Diocese	\$47,589	\$186,441	25.53%	\$1,925,667	\$2,237,296	86.07%	\$2,237,296	86.07%

The Episcopal Diocese of Upper South Carolina
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		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>									
101	Province IV Pledge	\$0	\$296	0.00%	\$1,480	\$3,552	41.67%	\$3,552	41.67%
102	Diocesan Pledge to The Episcopal Church	\$23,940	\$23,940	100.00%	\$287,278	\$287,278	100.00%	\$287,278	100.00%
103	Deputies to General & Synod Convention	\$1,250	\$1,250	100.00%	\$15,000	\$15,000	100.00%	\$15,000	100.00%
104	Lambeth Conference	\$83	\$83	100.00%	\$1,000	\$1,000.00	100.00%	\$1,000	100.00%
105	Ecumenical Relations	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
106	Commission on TEC & Anglican Communion	\$25,273	\$25,653	98.52%	\$304,758	\$307,830	99.00%	\$307,830	99.00%
<u>Commission on Mission & International Concerns</u>									
107	Episcopal Relief & Development	\$0	\$42	0.00%	\$0	\$500	0.00%	\$500	0.00%
108	Millennium Development Goals (0.7% of total Income)	\$6,468	\$1,517	426.46%	\$18,200	\$18,200	100.00%	\$18,200	100.00%
109	World Mission Committee - Cange	\$5,737	\$1,167	491.76%	\$5,631	\$14,000	40.22%	\$14,000	40.22%
110	Ecuador Programs	\$0	\$1,167	0.00%	\$14,000	\$14,000	100.00%	\$14,000	100.00%
111	SC Bishops' Public Education Initiative	(\$6,136)	\$1,196	-513.14%	\$11,614	\$14,350	80.94%	\$14,350	80.94%
112	Camp AIR (Adventures in Reading)	\$0	\$83	0.00%	\$0	\$1,000	0.00%	\$1,000	0.00%
113	Matthew 25 Outreach Grants	\$0	\$1,250	0.00%	\$9,000	\$15,000	60.00%	\$15,000	60.00%
114	Racial Reconciliation	\$0	\$83	0.00%	\$427	\$1,000	42.68%	\$1,000	42.68%
115	HIV/AIDS Committee	\$1,000	\$83	1200.00%	\$1,000	\$1,000	100.00%	\$1,000	100.00%
116	Voorhees Scholars Program	(\$680)	\$417	-163.20%	\$20	\$5,000	0.39%	\$5,000	0.39%
117	NEW - Environmental Stewardship and Justice	\$0	\$83	0.00%	\$374	\$1,000	37.37%	\$1,000	37.37%
118	Commission on Mission & International Concerns	\$6,389	\$7,088	90.14%	\$60,266	\$85,050	70.86%	\$85,050	70.86%
119	Total Expenses	\$114,574	\$240,924	47.56%	\$2,454,391	\$2,891,088	84.90%	\$2,891,088	84.90%
120	Net (over)/under	\$181,298	(\$1,715)		\$327,168	(\$20,580)		(\$20,580)	

2021 Episcopal Pledge Commitment Report

as of 10.25.2021

Church:	Church City:	2021 Lower Pledge Option	2021 Pledge Accepted	Acceptances / Lower Option
Trinity Episcopal Church	Abbeville	\$ 7,273	\$ 8,299	114.11%
St Augustine of Canterbury	Aiken	\$ 32,204	\$ 32,204	100.00%
St Thaddeus Episcopal Church	Aiken	\$ 114,479	\$ 93,800	81.94%
Grace Episcopal Church	Anderson	\$ 58,952	\$ 58,952	100.00%
St. George's Church	Anderson	\$ 13,713	\$ 13,713	100.00%
All Saints' Episcopal Church	Beech Island	\$ 8,827		0.00%
St Margarets Episcopal Church	Boiling Springs	\$ 22,347	\$ 10,680	47.79%
Grace Episcopal Church	Camden	\$ 57,513	\$ 57,513	100.00%
All Saints' Episcopal Church	Cayce	\$ 19,212	\$ 12,000	62.46%
St Francis of Assisi	Chapin	*	\$ 5,400	NM
St Marks Episcopal Church	Chester	\$ 3,867		0.00%
Holy Trinity Episcopal Church	Clemson	\$ 86,574	\$ 86,574	100.00%
All Saints' Episcopal Church	Clinton	\$ 22,425	\$ 22,425	100.00%
Church of the Cross	Columbia	\$ 8,545	\$ 8,545	100.00%
Church of the Good Shepherd	Columbia	\$ 70,508	\$ 60,000	85.10%
St David's Episcopal Church	Columbia	\$ 60,160	\$ 60,160	100.00%
St John's Episcopal Church	Columbia	\$ 153,349	\$ 153,349	100.00%
St Luke's Episcopal Church	Columbia	\$ 35,360	\$ 16,000	45.25%
St Martin's in the Fields	Columbia	\$ 160,567	\$ 161,000	100.27%
St Mary's Episcopal Church	Columbia	\$ 66,868	\$ 55,000	82.25%
St Michael & All Angels'	Columbia	\$ 53,615	\$ 21,000	39.17%
St Timothy's Episcopal Church	Columbia	\$ 24,507	\$ 16,000	65.29%
Trinity Cathedral Church	Columbia	\$ 504,124	\$ 360,000	71.41%
St Michael's Episcopal Church	Easley	\$ 33,697	\$ 22,080	65.53%
St Thomas Church	Eastover	\$ 3,680		0.00%
St Paul's Episcopal Church	Fort Mill	\$ 35,464	\$ 19,506	55.00%
Episcopal Church of the Incarnation	Gaffney	\$ 20,128	\$7,200.00	35.77%
Calvary Episcopal Church	Glenn Springs / Pauline	\$ 8,238	\$ 3,674	44.60%
St Paul's Episcopal Church	Graniteville	\$ 7,136	\$ 2,400	33.63%
St Peter's Episcopal Church	Great Falls	\$ 1,975	\$ 1,975	100.00%

2021 Episcopal Pledge Commitment Report

as of 10.25.2021

Church:	Church City:	2021 Lower Pledge Option	2021 Pledge Accepted	Acceptances / Lower Option
Christ Episcopal Church	Greenville	\$ 467,745	\$ 310,278	66.33%
Church of the Redeemer	Greenville	\$ 43,232	\$ 43,232	100.00%
St Andrew's Episcopal Church	Greenville	\$ 36,108	\$ 36,108	100.00%
St Francis Episcopal Church	Greenville	\$ 4,471		0.00%
St James Episcopal Church	Greenville	\$ 102,056	\$ 102,056	100.00%
St Peter's Episcopal Church	Greenville	\$ 97,915	\$ 97,915	100.00%
St Philip's Church	Greenville	\$ 8,098	\$ 8,580	105.95%
Church of the Resurrection	Greenwood	\$ 56,957	\$ 56,957	100.00%
Church of the Good Shepherd	Greer	\$ 22,743	\$ 16,300	71.67%
St John's Episcopal Church	Hopkins / Congaree	\$ 22,685	\$ 22,685	100.00%
Epis Ch of St Simon & St Jude	Irmo	\$ 39,681	\$ 32,456	81.79%
St Barnabas Episcopal Church	Jenkinsville	\$ 6,802	\$ 7,444	109.44%
Christ Episcopal Church	Lancaster	\$ 20,044	\$ 8,000	39.91%
Church of the Epiphany	Laurens	\$ 12,621	\$ 6,000	47.54%
St Alban's Episcopal Church	Lexington	\$ 37,016	\$ 30,000	81.05%
St Luke's Episcopal Church	Newberry	\$ 12,030	\$ 3,500	29.09%
St Bartholomew's Episcopal Church	North Augusta	\$ 46,260	\$ 5,000	10.81%
St Stephen's Episcopal Church	Ridgeway	\$ 11,879	\$ 11,879	100.00%
Episcopal Church of Our Saviour	Rock Hill	\$ 66,056	\$ 66,056	100.00%
Church of the Ascension	Seneca	\$ 14,022		0.00%
Holy Cross Episcopal Church	Simpsonville	\$ 75,593	\$ 27,000	35.72%
Episcopal Church of the Advent	Spartanburg	\$ 307,181	\$ 307,181	100.00%
Episcopal Church of the Epiphany	Spartanburg	\$ 4,800	\$ 600	12.50%
St Christopher's Church Episcopal	Spartanburg	\$ 37,397	\$ 7,000	18.72%
St Matthew's Episcopal Church	Spartanburg	\$ 66,461	\$ 66,461	100.00%
Episcopal Church of the Ridge	Trenton	\$ 24,348	\$ 24,348	100.00%
Church of the Nativity	Union	\$ 8,121		0.00%
St John's Episcopal Church	Winnsboro	\$ 7,982	\$ 8,295	103.92%
Church of the Good Shepherd	York	\$ 30,108	\$ 30,108	100.00%
	Total:	\$ 3,385,719	\$ 2,704,889	79.89%
\$ Budgeted in 2021 SOM:	\$2,409,465		53	Total Received
% of 2021 SOM Committed:	112.26%		6	Total Outstanding
			59	
*Note: Due to the 2019 parochial report not submitted. The lower pledge balance for St. Francis, Chapin is not present. St. Francis has accepted a pledge amount of \$5,400 for 2021.				

Accounts

Assets		
Bank Accounts		
Operating Account		
Bishop's Trust Fund CIB	\$54,704.63	
Cash in Bank	\$1,784,316.67	
Total Operating Account	\$1,839,021.30	
Money Market		
Bishop's Discretionary Account	\$8,349.91	
Total Bank Accounts		\$2,205,172.59
Investments		
Perm.Inv.-Perm.Restr.	\$303,820.00	
Perm.Inv.-Temp. Restr.	\$4,188,914.75	
Perm.Investments-Unrest.	\$3,609,162.31	
Total Investments		\$8,101,897.06
Fixed Assets		
Buildings	\$810,113.42	
Furniture & Equipment	\$247,257.12	
Land	\$273,759.54	
Mortgage Rec-Good Shepherd, N.Aug	\$182,282.92	
Total Fixed Assets		\$1,513,413.00
Other Assets		
Accumulated Depreciation	(\$1,020,389.94)	
Pre-paid Expenses	\$0.02	
Total Other Assets		(\$1,020,389.92)
Accounts Receivables		
A/R - Year End	(\$40,631.00)	
A/R Deployment	\$4,900.15	
A/R General	\$5,003.00	
A/R Gravatt	\$96,500.00	
Pledges Receivable	\$9,827.96	
Total Accounts Receivables		\$75,600.11
A/R Group Health Insurance		\$5,307.01
ECH at York Place, Inc.		
ECH Checking		
ECH at York Place, Inc. - Checking	\$46,621.44	
Total ECH Checking	\$46,621.44	
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		
A/R ECHYP	\$125,000.00	
Beneficial Interest - ECHYP - Chale	\$303,710.80	
Beneficial Interest - ECHYP - Taylo	\$1,092,458.04	
Beneficial Interest - ECHYP - Way T	\$631,566.44	
ECHYP - Accumulated Depreciation	(\$136,007.20)	
Total ECH Other Assets	\$2,016,728.08	
Total ECH at York Place, Inc.		\$4,803,906.34
Total Assets		\$15,684,906.19

Liabilities, Fund Principal, & Restricted Funds

Liabilities		
A/P Epis. Diocese of Upper SC	\$350,000.00	
A/P Year End	(\$2,057.79)	

Episcopal Diocese of Upper SC
Balance Sheet
September 2021

Accounts

Annuities Payable	\$260.00	
Investments Held for Distribution	(\$900.46)	
Investments to Forward	\$325.00	
Total Liabilities		\$347,626.75
Fund Principal		
Board Designated Net Assets	\$19,960.00	
P.R.N.A.-Investments	\$303,820.00	
T.R.N.A.-Investments	\$3,978,277.71	
Unrestr.N.A.- St. of Miss'n	\$3,835,732.99	
Unrestr.N.A.-HCI	\$241,447.63	
Unrestr.N.A.-Non-SOM	\$1,682,525.48	
ECH at York Place, Inc.		
ECH at York Place Restricted FP	\$1,779,444.86	
ECH at York Place, Inc. - Fund Prnc	\$2,478,036.97	
Total ECH at York Place, Inc.	\$4,257,481.83	
Excess Cash Received	\$386,727.73	
Total Fund Principal and Excess Cash Received		\$14,705,973.37
Restricted Funds		
Total Temporary Restricted	\$631,306.07	
Total Restricted Funds		\$631,306.07
Total Liabilities, Fund Principal, & Restricted Funds		\$15,684,906.19

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

		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%)	\$247,132	\$210,789	\$2,029,364	\$1,897,098.75	106.97%	\$2,529,465	80.23%
4	Support for Theological Ed. (Endowment)	\$431	\$0	\$952	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$73	\$0	\$161	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$29,251	\$0	\$263,261	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	\$18,750	0.00%	\$25,000	0.00%
9	Total Revenue	\$247,636	\$242,123	\$2,030,478	\$2,179,109	93.18%	\$2,905,479	69.88%
	Expenses:							
26	Commission on Ministry	\$0	\$3,667	\$13,067	\$33,000	39.60%	\$44,000	29.70%
36	Commission on Christian Formation	(\$722)	\$3,821	(\$548)	\$34,388	-1.59%	\$45,850	-1.20%
52	Commission on Congregations	\$65,342	\$15,687	\$122,847	\$141,186	87.01%	\$188,248	65.26%
101	Commission on the Diocese	\$148,197	\$185,302	\$1,455,870	\$1,667,720	87.30%	\$2,223,626	65.47%
107	Commission on TEC & Anglican Communion	\$26,076	\$26,252	\$234,683	\$236,264	99.33%	\$315,019	74.50%
119	Commission on Mission & International Concerns	(\$290)	\$7,208	\$57,706	\$64,875	88.95%	\$86,500	66.71%
120	Total Expenses	\$238,603	\$241,937	\$1,883,625	\$2,177,432	86.51%	\$2,903,243	64.88%
121	Net (over)/under	\$9,033	\$186	\$146,853	\$1,677		\$2,236	
	Note: Health Ins. Is prepaid a month in advance.							

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

		September	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%)	\$247,132	\$210,789	117.24%	\$2,029,364	\$1,897,099	106.97%	\$2,529,465	80.23%
4	Support for Theological Ed. (Endowment)	\$431	\$0	0.00%	\$952	\$0	0.00%	\$0	0.00%
5	Continuing Ed. for Clergy (Endowment)	\$73	\$0	0.00%	\$161	\$0	0.00%	\$0	0.00%
6	Withdrawals from Diocesan Endowment Portfolio	\$0	\$29,251	0.00%	\$0	\$263,261	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	\$18,750	0.00%	\$25,000	0.00%
9	Total Revenue	\$247,636	\$242,123	102.28%	\$2,030,478	\$2,179,109	93.18%	\$2,905,479	69.88%
	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	\$0	\$556	0.00%	\$0	\$5,000	0.00%	\$6,667	0.00%
12	Fall Clergy Conference	\$0	\$647	0.00%	\$0	\$5,825	0.00%	\$7,767	0.00%
13	Ministry of Clergy Spouses	\$0	\$17	0.00%	\$0	\$150	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	\$900	66.67%	\$1,200	50.00%
17	Committee for Retired Clergy/Spouses	\$0	\$125	0.00%	\$779	\$1,125	69.22%	\$1,500	51.91%
	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	\$9,000	41.07%	\$12,000	30.80%
21	Theological Education Assistance	\$0	\$667	0.00%	\$7,992	\$6,000	133.20%	\$8,000	99.90%
22	NEW - Seminarian Retreat	\$0	\$556	0.00%	\$0	\$5,000	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	\$0	\$3,667	0.00%	\$13,067	\$33,000	39.60%	\$44,000	29.70%

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

		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	Order of the Daughters of the King	\$0	\$142	0.00%	\$1,700	\$1,275	133.33%	\$1,700	100.00%
28	Cursillo	\$0	\$558	0.00%	\$165	\$5,025	3.28%	\$6,700	2.46%
29	Vocare	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
30	Children's Ministry	\$0	\$375	0.00%	(\$1,454)	\$3,375	-43.09%	\$4,500	-32.32%
	General Children's Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	5th Grade Bridge Retreat	\$0	\$375	0.00%	(\$1,454)	\$3,375	-43.09%	\$4,500	-32.32%
31	Youth Ministry	(\$722)	\$2,600	-27.78%	(\$2,377)	\$23,400	-10.16%	\$31,200	-7.62%
	Happening	(\$600)	\$1,850	-32.43%	(\$2,785)	\$16,650	-16.73%	\$22,200	-12.55%
	General Youth Ministry	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	YM: Middle School Fall Lock-in	(\$340)	\$392	-86.81%	(\$340)	\$3,525	-9.65%	\$4,700	-7.23%
	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	\$0	\$183	0.00%	\$0	\$1,650	0.00%	\$2,200	0.00%
	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.	\$218	\$175	124.35%	\$749	\$1,575.00	47.54%	\$2,100	35.65%
32	Adult Formation Ministry	\$0	\$0	0.00%	(\$332)	\$0.00	0.00%	\$0	0.00%
	Safe Church Trainers	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
	Adult Formation Ministry	\$0	\$0	0.00%	(\$332)	\$0	0.00%	\$0	0.00%
	Safe Church Trainers <i>*Now included in Adult Formation*</i>								
33	Community of Hope	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
34	Education for Ministry	\$0	\$146	0.00%	\$1,750	\$1,313	133.33%	\$1,750	100.00%
35	Episcopal Church Women	\$0	\$0	0.00%	\$0	\$0.00	0.00%	\$0	0.00%
36	Commission on Christian Formation	(\$722)	\$3,821	-18.91%	(\$548)	\$34,388	-1.59%	\$45,850	-1.20%

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

		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>									
37	Holy Cross, Simpsonville - Hispanic Ministries	\$3,333	\$1,469	226.82%	\$3,333	\$13,225	25.20%	\$17,633	18.90%
38	St. Francis, Greenville - Hispanic Ministries	\$21,260	\$2,927	726.33%	\$31,344	\$26,344	118.98%	\$35,125	89.23%
<i>African American Ministries</i>									
39	St. Thomas, Eastover	\$3,505	\$450	779.51%	\$4,880	\$4,047	120.59%	\$5,396	90.44%
<i>New Ways of Being Church</i>									
40	Church of the Cross, Columbia	\$4,021	\$965	416.52%	\$9,521	\$8,687	109.59%	\$11,583	82.19%
41	Diocesan Curate Support	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
42	Young Adult Communities: Campus Ministries	\$1,137	\$4,258	26.71%	\$12,616	\$38,323	32.92%	\$51,098	24.69%
	YAM: Canterbury Communities (General Expenses)	\$0	\$379	0.00%	\$60	\$3,410	1.76%	\$4,547	1.32%
	YAM: Clemson Canterbury	\$505	\$292	173.02%	\$917	\$2,625	34.95%	\$3,500	26.21%
	YAM: Furman Canterbury	\$0	\$167	0.00%	\$0	\$1,500	0.00%	\$2,000	0.00%
	YAM: Presbyterian Coll. Canterbury	\$0	\$167	0.00%	\$377	\$1,500	25.14%	\$2,000	18.86%
	YAM: Univ. S.C. Canterbury	\$633	\$375	168.71%	\$2,798	\$3,375	82.90%	\$4,500	62.17%
	YAM: Rock Hill Canterbury	\$0	\$988	0.00%	\$8,351	\$8,888	93.95%	\$11,851	70.46%
	YAM: Spartanburg Canterbury	\$0	\$292	0.00%	\$113	\$2,625	4.31%	\$3,500	3.23%
	YAM: Clemson Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$2,400	66.67%	\$3,200	50.00%
	YAM: Furman Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$2,400	66.67%	\$3,200	50.00%
	YAM: Presbyterian Coll. Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$2,400	66.67%	\$3,200	50.00%
	YAM: Univ. S.C. Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$2,400	66.67%	\$3,200	50.00%
	YAM: Rock Hill Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$2,400	66.67%	\$3,200	50.00%
	YAM: Spartanburg Canterbury Stipend	\$0	\$267	0.00%	\$1,600	\$2,400	66.67%	\$3,200	50.00%
43	Episcopal Service Corps	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
<i>Continuing Support</i>									
44	NEW - Ascension, Seneca	\$3,333	\$1,309	254.62%	\$15,708	\$11,781	133.33%	\$15,708	100.00%
45	All Saints', Beech Island	\$3,498	\$443	790.06%	\$4,818	\$3,985	120.91%	\$5,313	90.68%
46	St. Christopher's, Spartanburg	\$3,917	\$862	454.39%	\$8,592	\$7,759	110.74%	\$10,346	83.05%
47	New- St. Bartholomew's, North Augusta	\$1,005	\$1,005	100.00%	\$9,045	\$9,045	100.00%	\$12,060	75.00%
48	Epiphany, Spartanburg	\$20,332	\$1,999	1017.14%	\$22,991	\$17,991	127.79%	\$23,988	95.84%
<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	\$65,342	\$15,687	416.53%	\$122,847	\$141,186	87.01%	\$188,248	65.26%

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

		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Commission on Convocations</u>								
53	Commission on Convocations	\$0	\$0		\$0	\$0		\$0	
	<u>Commission on the Diocese</u>								
	Clergy Insurance								
54	Group Long-Term Disability	\$1,291	\$1,750	73.79%	\$10,189	\$15,750	64.69%	\$21,000	48.52%
55	Group Insurance - Active Clergy	\$43,313	\$53,760	80.57%	\$509,575	\$483,840	105.32%	\$645,120	78.99%
56	Group Insurance - Retired	\$8,300	\$10,417	79.68%	\$89,722	\$93,750	95.70%	\$125,000	71.78%
57	Subtotal - Clergy Insurance	\$52,904	\$65,927	80.25%	\$609,485	\$593,340	102.72%	\$791,120	77.04%
	Office of the Bishop								
58	Bishop Stipend	\$13,267	\$13,267	100.00%	\$119,400	\$119,400	100.00%	\$159,200	75.00%
59	Bishop Pension	\$2,388	\$2,388	100.00%	\$21,492	\$21,492	100.00%	\$28,656	75.00%
60	Bishop Insurance	\$1,927	\$1,838	104.87%	\$19,270	\$16,538	116.52%	\$22,050	87.39%
61	Bishop's Staff Stipends & Benefits	\$50,077	\$58,875	85.06%	\$518,589	\$529,875	97.87%	\$706,500	73.40%
62	Staff FICA	\$2,003	\$2,167	92.45%	\$15,563	\$19,500	79.81%	\$26,000	59.86%
63	Short-term disability	\$129	\$200	64.52%	\$1,045	\$1,800	58.04%	\$2,400	43.53%
64	Episcopal Visitations	\$0	\$0	0.00%	\$0	\$0	0.00%	\$0	0.00%
65	Diocesan House Admin. Expenses	\$5,772	\$10,333.33	55.86%	\$57,795	\$93,000.00	62.15%	\$124,000	46.61%
66	Bishop Travel, Continuing Ed. & Hospitality	\$563	\$2,500	22.53%	\$4,741	\$22,500	21.07%	\$30,000	15.80%
67	Canon Staff Travel	\$0	\$2,500	0.00%	\$3,429	\$22,500	15.24%	\$30,000	11.43%
68	Non-Canon Staff Conferences/Continuing Ed/Travel	\$299	\$1,250	23.92%	\$1,742	\$11,250	15.48%	\$15,000	11.61%
69	Property manager shared with Trinity	\$1,000	\$1,000	100.00%	\$9,000	\$9,000	100.00%	\$12,000	75.00%
70	DH Capital Maintenance Fund	\$0	\$833	0.00%	\$2,370	\$7,500	31.60%	\$10,000	23.70%
71	New - Repayment of Diocean House Renovations Funds	\$0	\$1,650	0.00%	\$0	\$14,850	0.00%	\$19,800	0.00%
72	Communications (e-DUSC, Web, on-line registratons)	\$110	\$2,083	5.29%	\$7,880	\$18,750	42.03%	\$25,000	31.52%
73	Bishop Search Expenditures	\$17,475	\$12,500	139.80%	\$23,157	\$112,500	20.58%	\$150,000	15.44%
74	Subtotal - Office of the Bishop	\$95,010	\$113,384	83.79%	\$805,472	\$1,020,455	78.93%	\$1,360,606	59.20%
	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	\$375	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	\$375	55.55%	\$500	41.66%

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

		September	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%	\$250	\$750	33.33%	\$1,000	25.00%
83	Still Hopes	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
84	Finlay House	\$0	\$42	0.00%	\$500	\$375	133.33%	\$500	100.00%
85	Gravatt	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$1,000	100.00%
86	Univ. of the South School of Theology (Sewanee)	\$0	\$333	0.00%	\$4,000	\$3,000	133.33%	\$4,000	100.00%
87	Voorhees	\$0	\$125	0.00%	\$1,500	\$1,125	133.33%	\$1,500	100.00%
88	Heathwood Hall Episcopal School	\$0	\$83	0.00%	\$1,000	\$750	133.33%	\$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%	\$9,250	\$7,500	123.33%	\$10,000	92.50%
	Diocesan Convention								
91	Diocesan Convention - Leadership & Business Days	\$0	\$1,250.00	0.00%	\$0	\$11,250.00	0.00%	\$15,000	0.00%
92	Convention Secretary	\$200	\$200	100.00%	\$1,800	\$1,800	100.00%	\$2,400	75.00%
93	Subtotal - Diocesan Convention	\$200	\$1,450	100.00%	\$1,800	\$13,050	100.00%	\$17,400	10.34%
	Diocesan Executive Council								
94	Diocesan Executive Council	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
95	D.E.C. Orientation & Planning	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
96	Audit & Accounting Services	\$0	\$1,667	0.00%	\$13,350	\$15,000	89.00%	\$20,000	66.75%
97	Insurance - Property, Liability, Bond	\$0	\$1,250	0.00%	\$14,668	\$11,250	130.38%	\$15,000	97.78%
98	Real Property Expenses	\$0	\$417	0.00%	\$1,412	\$3,750	37.66%	\$5,000	28.24%
99	NEW - Diocesan Chancellors	\$0	\$250	0.00%	\$225	\$2,250	10.00%	\$3,000	7.50%
100	Subtotal - Diocesan Executive Council	\$0	\$3,667	0.00%	\$29,655	\$33,000	89.86%	\$44,000	67.40%
101	Commission on the Diocese	\$148,197	\$185,302	79.98%	\$1,455,870	\$1,667,720	87.30%	\$2,223,626	65.47%

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

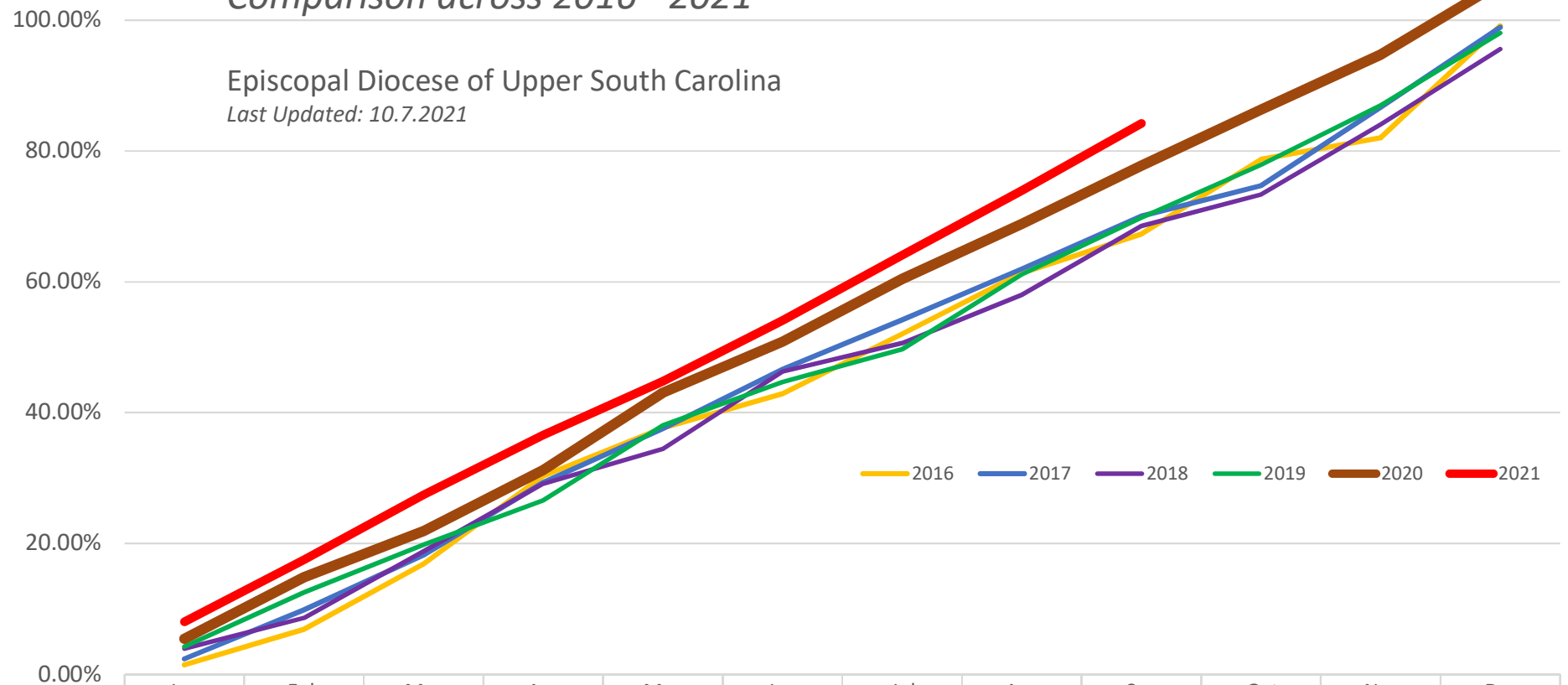
		September	Monthly Budget	% of Monthly Budget	Year-to-Date	YTD Budget	% of YTD Budget	Annual Budget	% of Annual Budget
	<u>Comm. on The Episcopal Church & the Anglican Communion</u>								
102	Province IV Pledge	\$173	\$296	58.33%	\$1,554	\$2,664	58.33%	\$3,552	43.75%
103	Diocesan Pledge to The Episcopal Church	\$24,236	\$24,206	100.13%	\$218,126	\$217,850	100.13%	\$290,467	75.10%
104	Deputies to General & Synod Convention	\$1,250	\$1,250	100.00%	\$11,250	\$11,250	100.00%	\$15,000	75.00%
105	Lambeth Conference	\$417	\$417	100.08%	\$3,752	\$3,750.00	100.06%	\$5,000	75.05%
106	Ecumenical Relations	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
107	Commission on TEC & Anglican Communion	\$26,076	\$26,252	99.33%	\$234,683	\$236,264	99.33%	\$315,019	74.50%
	<u>Commission on Mission & International Concerns</u>								
108	Episcopal Relief & Development	\$0	\$42	0.00%	\$0	\$375	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	(\$5,000)	\$2,027	-246.66%	\$10,000	\$18,244	54.81%	\$24,325	41.11%
111	Ecuador Programs	\$0	\$2,027	0.00%	\$15,000	\$18,244	82.22%	\$24,325	61.66%
112	SC Bishops' Public Education Initiative	\$4,710	\$1,196	393.89%	\$17,116	\$10,763	159.04%	\$14,350	119.28%
113	Camp AIR (Adventures in Reading)	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
114	Matthew 25 Outreach Grants	\$0	\$1,250	0.00%	\$15,000	\$11,250	133.33%	\$15,000	100.00%
115	Racial Reconciliation	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
116	HIV/AIDS Committee	\$0	\$83	0.00%	\$0	\$750	0.00%	\$1,000	0.00%
117	Voorhees Scholars Program	\$0	\$417	0.00%	\$590	\$3,750	15.73%	\$5,000	11.80%
118	Environmental Stewardship and Justice	\$0	\$42	0.00%	\$0	\$375	0.00%	\$500	0.00%
119	Commission on Mission & International Concerns	(\$290)	\$7,208	-4.02%	\$57,706	\$64,875	88.95%	\$86,500	66.71%
120	Total Expenses	\$238,603	\$241,937	98.62%	\$1,883,625	\$2,177,432	86.51%	\$2,903,243	64.88%
121	Net (over)/under	\$9,033	\$186		\$146,853	\$1,677		\$2,236	

Monthly Progress toward Budgeted Annual Pledge Income

Comparison across 2016 - 2021

Episcopal Diocese of Upper South Carolina

Last Updated: 10.7.2021



	Jan 1	Feb 2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov 11	Dec 12
2016	1.46%	6.91%	16.88%	30.33%	37.66%	42.89%	52.02%	61.33%	67.31%	78.74%	82.05%	99.13%
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%	105.68%
2021	8.03%	17.53%	27.48%	36.61%	44.80%	54.10%	64.08%	73.97%	84.22%			

The Episcopal Diocese of Upper South Carolina

Investment Fund History

Approval Authority	Fund #		Trust Name	Date Est.	Original Amount	Available for use (principal, interest, or both)	Designated Purpose if any	Mkt.Value	Available
								Grand Total Market Value 9/30/2021:	
Bishop	1001	*	Julia R. Bachman Fund	1923	\$14,000.00	Principal & Income	"For the establishment of a church home in Columbia as a refuge for the needy members of the Church...primarily for women..." at the Bishop's discretion *	\$205,755.24	\$205,755.24
Bishop	1002	*	Baker Fund	1933	\$5,000.00	Income only	As recommended by the Bishop and approved by the Trustees for "Furthering of religious, educational, or charitable work for negroes" *	\$25,494.80	20,494.80
Bishop	1003	*	Calvary/Glenn Springs per will of A.Z.Cates <i>see FN1</i>	1957	funds plus 191 acre timber farm (\$42,532.90)	income only	Bishop's trust fund as he may direct "...for the benefit & aid of Calvary Glenn Springs"	\$309,104.75	266,571.85
Bishop	1004	*	Sophie P. Carroll Columbia, SC	1924	\$500.00	interest & profits	for "Missionary work in the Diocese" by Bishop and the Trustees"	\$8,586.45	8,086.45
Bishop	1005	*	Annie F. Cates <i>see FN1</i>	1936	\$1,176.00	income only	First as a supplement to the rector's salary, and second for upkeep of Calvary Church, Glenn Springs	\$8,477.98	7,301.98
Bishop	1006	*	Honorio Z. Cates Memorial Fd. by Florine Cates (Mrs. Paul) Simpson <i>see FN1</i>	1936	\$1,250.00	income only	to the Bishop to be used "First for Calvary Church, Glenn Springs, and second for any work designated by Bishop" *	\$23,045.29	21,795.29
Bishop	1007	*	Mrs. J.E. Hart Fund	1931	\$1,000.00	income only	at the discretion of the Bishop *	\$21,211.12	20,211.12
Bishop	1008	*	Elizabeth LaBorde	1930	\$250.00	income only	To Trustees for diocesan missions*	\$4,289.70	4,039.70
Bishop	1009	*	Richard I. Manning Trust Fd.	1932	\$10,000.00	income only	for "Missionary work in the Diocese..." as the Bp. And Trustees may decide.*	\$172,410.84	162,410.84
Bishop	1010	*	Prayer Book Tract Society	1923	\$2,174.26	income only	Used for purchase of religious books & literature*	\$47,985.54	45,811.28
Bishop	1011	*	Shuler Fund	1923	\$1,150.00	income only	To Trustees for use, at the discretion of the Bishop, "to care for church property & for insurance premiums thereon..."	\$19,756.05	18,606.05
Bishop	1012	*	Anna Stille Memorial Fund by her mother, Mrs. Anna Dulles Stille	1902	\$6,000.00	income only	to "Endow St. Anna's Chapel" - St. Anna's closed 1961; Bishop Cole designated income to be used for work in the African-Americans communities*	\$10,245.27	4,245.27
Bishop	1013	*	Mrs. S.I. Sulbacher gift as a memorial to her mother, Mrs. Charles E. Jarrot (Emma Bryan)	1929	\$650.00	income only	At the discretion of the Bishop "for the work of the church" *	\$8,372.45	7,722.45
Bishop	1014	*	Turnbull Trust	1981	\$15,000.00	net income	To Bishop for any program to enhance the programs of finance & stewardship *	\$58,480.58	43,480.58
Bishop	1015	*	Corrie M. Zimmerman Fund <i>see FN1</i>	1931	\$1,000.00	income only	to Bishop to supplement the yearly salary of the rector of Calvary Church, Glenn Springs *	\$10,019.28	9,019.28
Bishop	1016	*	Mary Zimmerman Fund <i>see FN1</i>	1923	\$1,000.00	income only	to the Bishop for a salary supplement for the rector of Calvary Church, Glenn Springs *	\$8,076.61	7,076.61
Bishop	1017	*	Nora Zimmerman 1914 gift augmented by a 1973 gift of Deaconess Florence Spires	1923	\$1,000.00 & \$2,000.00	income only	Diocesan missions in the Upcountry or worldwide *	\$23,306.40	20,306.40
Bishop	2001		Bishop's Permanent Fund (orig.est. in 1818 augmented by H.V.R. Schrader 1961 gift of \$4,174.11)	1923 1961	\$25,000.00	Income only	to the Trustees for "the support of the Episcopate..." as requested by the bishop.	\$409,164.52	384,164.52

Approval Authority	Fund #		Trust Name	Date Est.	Original Amount	Available for use (principal, interest, or both)	Designated Purpose if any	Mkt.Value	Available
								Grand Total Market Value 9/30/2021:	
DEC	2002		Diocesan Council General Fund *note: \$206,000 withdrawn 7/20/12 to pay off the St. Matthias mortgage.				Board of Trustees account	\$640,404.47	\$640,404.47
DEC	2003		Operation Reserve				Unrestricted - at discretion of Trustees	\$260,901.54	\$260,901.54
DEC	2004	*	The Maj.Wm.Arthur Collett Mem.Fd. by will of Sarah Rainsford Collett of Edgefield	1962	\$128,608.19	income first and special conditions for principal	"For care of children in the diocese... with full discretion in the Trustees... even to provide a building..for these purposes... "normally used for scholarship funds/Gravatt	\$136,544.14	\$136,544.14
DEC	2005	!	Beattie Foundation see FN 3	1981	\$5,000.00	Income only	Continuing education for clergy	\$92,591.29	87,591.29
DEC	2006	!	Continuing Education for clergy				Continuing education for clergy	\$34,110.46	\$34,110.46
DEC	2007	!	Bowen-DeHon Memorial Fd. (est. 1825; augmented by gift of M/M Geddings Crawford in 1953 of \$1,050)	1927	\$3,750.00	Income only	For theological education - seminar expense	\$90,282.54	86,532.54
DEC	2008	!	Pringle-Frost Mem. Fund see FN2	1923	\$1,800.00	income only	For theological education - seminar exp.	\$28,433.87	26,633.87
DEC	2009	!	Theological Education originally an 1866 gift of 44 acres in Spartanburg County see FN2	1923	\$5,050.00	income only	For theological academic education of postulants or candidates for Holy Orders in the Diocese..."	\$208,304.61	203,254.61
DEC	2010	!	Addie R. Tingley Theological Education Scholarship Fund see FN2	1966	\$34,824.77	income only	For "theological education for candidates approved by the Bishop for scholarships with communicants of the Church of the Holy Saviour Rock Hill having preference"	\$187,380.54	152,555.77
DEC	2011	!	Martha H. (Mrs. David R.) Williams Memorial Fund see FN2	1961	\$25,000.00	income only	to the Foundation/Trustees "for the education of prospective clergy of the Protestant Episcopal Church"	\$233,248.00	208,248.00
DEC	2012	*	Henry B. Richardson Life ins. proceeds to Trustees		\$75,000.00	income only	Trustees for mission work - designated for Builders for Mission program	\$328,585.43	253,585.43
DEC	2013		Clippard Endowment/New Missions	1997	\$90,000.00	income only	50/50 Builders for Mission/New Miss'ns	\$329,609.46	239,609.46
DEC	2014		Winthrop College			income	Trustees for St. Mary's Center at Winthrop	\$9,849.15	
DEC	2015		Bagwell Trust			income only	Gravatt scholarships for Greenville boys	\$20,295.16	20,295.16
DEC	2016		Partnership Cange	1997	\$19,000.00	income only	for on-going support of Cange, Haiti	\$941,338.06	922,338.06
DEC	2018		Fritz Walker Memorial Fund	1998	\$3,635.00		if principal>=\$10,000, 50% income avail. for Seminarian grants. If principal >=\$20,000, 100% income available for Seminarian grants.	\$36,920.67	
DEC	2019		Thompson Fund	1998	\$25,000.00	unrestricted	unrestricted/undesignated	\$144,900.41	\$144,900.41
DEC	2021		Shafto: New Miss'n/Ch Expansion	2003	\$79,591.50	unrestricted	Unrestricted/Undesignated	\$162,898.08	\$162,898.08
DEC	2023		Proceeds from All Souls' sale	2007	\$99,083.91	designated by DEC	New Mission Congregational Development	\$242,790.88	\$242,790.88
DEC	2025		Canterbury of Rock Hill	2008	\$89,898.50	unrestricted	Proceeds from sale of Canterbury House at Winthrop.(Designated by DEC)	\$148,321.03	\$148,321.03
DEC	2027		Union County Proceeds	2008	\$435,286.27	temp. restr. princ & inc	Proceeds from sale of Union County property for benefit of Calvary, Glenn Sp.	\$290,732.77	\$290,732.77

Approval Authority	Fund #		Trust Name	Date Est.	Original Amount	Available for use (principal, interest, or both)	Designated Purpose if any	Mkt.Value	Available
								Grand Total Market Value 9/30/2021:	
DEC	2029		Proceeds from Clearwater sale	2011		designated by DEC	Proceeds from sale of Clearwater prop.	\$68,551.33	\$68,551.33
DEC	2030		Proceeds from St. Matthias sale	2013	\$762,515.55	designated by DEC	Proceeds from sale of St. Matthias prop.	\$964,314.47	\$964,314.47
DEC	3001		Zion, Eastover **				Building & land maintenance	\$14,014.69	
DEC	3002	*	St. John's, Congaree **	1923	\$5,700.00	income only	"for upkeep of cemetery and expenses	\$78,835.48	73,135.48
DEC	3003	*	Kaminer (St. John's) Trust Fd. ** St. John's, Congaree	1968	\$2,000.00	income only	Upkeep of Kaminer plot at St. John's Church Cemetery, Congaree	\$11,506.90	9,506.90
DEC	3004		St. Paul's, Graniteville (per John T. Knott legacy)**	1944	\$32,465.34	principal & income	For the benefit of St. Paul's Church	\$13,199.69	\$13,199.69
DEC	2024+2028		Healthy Church Foundation + Bishop's Legacy Fund	2008 & 2009	\$1,000 + \$8,112.41	unrestricted	Bishop's gift to clergy opened fund. Fund will grow with receipts of church tithes from capital campaigns	\$153,643.80	\$153,643.80
			Bishop's Legacy Funds:					0	

Net of Bishop's Legacy Funds: \$1,235,515.03

\$1,213,800.34

Total Diocesan Funds	\$7,246,291.79
15 Church/Institutional Funds	\$4,719,053.27
Portfolio Total	\$11,965,345.06

Notes to Fund Histories:

* Quarterly income distributed to the Bishop's Trust Fund.

** Investments held in trust (to be used only by entity named as donor)

! Quarterly income distributed to the SOM

Footnotes:

[1] Income received by the Bishop and forwarded to Calvary or used for Calvary's expenses quarterly.

[2] Used in addition to budget item for Theol. Ed. paid directly to seminarians.

[3] No set original amount. Amounts included in diocesan budget were matched from the Beattie Found. over a period of years

Further notes:

- There is a William Trumble Trust managed by First National Bank in Orangeburg. It's value, \$7,046.73, is maintained on the diocesan balance sheet.
- A 1966 gift amounting to less than \$600.00 dollars "in memory of the late Sarah Blake Steadman" for a home for the aged was apparently fully disposed of when Still Hopes became a viable entity, but there is little to confirm this.
- There is mention of a "Mountain Work Fund" originally in 1928 of \$505.57 "...for work in the upper part of the Diocese", the present whereabouts and disposition being uncertain.

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2022 SOM

Last Updated: 10.26.2021

	<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021	Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2021 SOM
	DIOCESAN RESOURCES				
3	Episcopal Pledge Income	ADJ	\$2,529,465	\$2,655,000	\$125,535
4	Support for Theological Ed. (Endowment)		\$0	\$8,400	\$8,400
5	Continuing Ed. for Clergy (Endowment)		\$0	\$1,400	\$1,400
6	Income from Diocesan Endowment Portfolio		\$351,014	\$66,090	(\$284,924)
7	30% Surplus from 2020		\$0	\$75,000	\$75,000
8	Episcopal Diocese Grant (projected)		\$0	\$40,000	\$40,000
9	Emergency Congregational Support		\$25,000	\$0	(\$25,000)
	Total Resources		\$2,905,479	\$2,845,890	(\$59,589)
Notes:					
ADJ	Approved Income increased by \$120,000 for 2021 By DEC 8.28.2021				

	<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021	Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2021 SOM
	DIOCESAN EXPENSES				
	<u>Commission on Ministry</u>				
10	COM: Leadership Development		\$0	\$0	\$0
	<i>Ordained Ministry</i>				
11	Clergy Pre-Lenten Retreat		\$6,667	\$3,000	(\$3,667)
12	Fall Clergy Conference		\$7,767	\$3,000	(\$4,767)
13	Ministry of Clergy Spouses		\$200	\$1,500	\$1,300
14	Deacons		\$0	\$1,000	\$1,000
15	New Clergy Leadership Development		\$0	\$1,000	\$1,000
16	Clergy Continuing Education		\$1,200	\$1,500	\$300
17	Committee for Retired Clergy/Spouses		\$1,500	\$2,500	\$1,000
	<i>Discernment & Theological Ed.</i>				
18	Vocational Discernment		\$0	\$2,000	\$2,000
19	Deacon Formation Program		\$0	\$1,000	\$1,000
20	Seminarian Insurance (Moved to COD 2022)		\$12,000	\$0	(\$12,000)
21	Theological Education Assistance		\$8,000	\$8,000	\$0
22	Seminarian Retreat		\$6,667	\$7,000	\$333
23	Seminarian Travel		\$0	\$1,500	\$1,500
24	Seminarian Emergency Funds		\$0	\$1,000	\$1,000
25	Seminarian Book Funds		\$0		\$0
	Commission on Ministry		\$44,000	\$34,000	(\$10,000)
	<u>Commission on Christian Formation</u>				
26	Order of the Daughters of the King (Moved to Office of the Bishop)		\$1,700	\$0	(\$1,700)
27	Cursillo		\$6,700	\$1,700	(\$5,000)
28	Children's Ministry		\$4,500	\$2,600	(\$1,900)
29	Youth Ministry		\$31,200	\$35,200	\$4,000
30	Young Adult Communities: Campus Ministries (Moved to Christian Formation 2022)	A	\$0.00	\$0	\$0
31	Adult Formation Ministry (Safe Church Trainers included)		\$0	\$3,150	\$3,150
32	Community of Hope		\$0	\$0	\$0
33	Education for Ministry		\$1,750	\$1,750	\$0
34	Episcopal Church Women		\$0	\$0	\$0
	Commission on Christian Formation		\$45,850	\$44,400	(\$1,450)

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2022 SOM

Last Updated: 10.26.2021

<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021		Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2021 SOM
<u>Commission for Congregations</u>					
<i>Hispanic Ministries</i>					
35	Holy Cross, Simpsonville - Hispanic Ministries		\$17,633	\$21,700	\$4,067
36	St. Francis, Greenville - Hispanic Ministries		\$35,125	\$27,000	(\$8,125)
<i>African American Ministries</i>					
37	St. Thomas, Eastover		\$5,395.50	\$4,000	(\$1,396)
<i>New Ways of Being Church</i>					
38	Church of the Cross, Columbia		\$11,583	\$4,000	(\$7,583)
39	Diocesan Curate Support		\$0	\$0	\$0
40	Young Adult Communities: Campus Ministries (Moved to Christian Formation 2022)	A	\$51,097.50	\$0	(\$51,098)
41	Episcopal Service Corps		\$0	\$0	\$0
<u>Continuing Support</u>					
42	Ascension, Seneca		\$15,708	\$27,000	\$11,292
43	All Saints', Beech Island		\$5,313	\$0	(\$5,313)
44	St. Christopher's, Spartanburg		\$10,346	\$5,000	(\$5,346)
45	St. Bartholomew's, North Augusta		\$12,060	\$18,000	\$5,940
46	Epiphany, Spartanburg		\$23,987.50	\$12,000	(\$11,988)
47	St. Francis, Chapin (Recently turned into a mission)		\$0.00	\$25,000	\$25,000
<u>Congregational & Stewardship Development</u>					
48	Congregational Workshops		\$0	\$4,000	\$4,000
49	Congregational Vitality and Sustainability		\$0	\$5,000	\$5,000
50	Stewardship Workshops (TENS membership)		\$0	\$1,500	\$1,500
Commission for Congregations			\$188,248.00	\$154,200	(\$34,048)
Notes:					
A Campus Ministry line 39 has investment funds in the amount of \$325,000 available for use.					
<u>Commission on Convocations</u>					
51	Commission on Convocations		\$0	\$0	\$0

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2022 SOM

Last Updated: 10.26.2021

<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021		Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2021 SOM
Commission on the Diocese					
Clergy Insurance					
52	Group Long-Term Disability		\$21,000	\$22,000	\$1,000
53	Group Insurance - Active Clergy	B	\$645,120	\$677,376	\$32,256
54	Group Insurance - Retired		\$125,000	\$125,000	\$0
Subtotal - Clergy Insurance			\$791,120	\$824,376	\$33,256
Office of the Bishop					
55	Bishop Stipend		\$159,200	\$185,000	\$25,800
56	Bishop Pension		\$28,656	\$29,600	\$944
57	Bishop Insurance		\$22,050	\$13,000	(\$9,050)
58	Bishop's Staff Stipends & Benefits		\$706,500	\$706,500	\$0
59	Staff FICA		\$26,000	\$26,000	\$0
60	Short-term disability		\$2,400	\$2,400	\$0
61	Episcopal Visitations		\$0	\$0	\$0
62	Diocesan House Admin. (utilities, phones, computers, postage, supplies, etc.)		\$124,000	\$150,000	\$26,000
63	Bishop Travel, Continuing Ed. & Hospitality		\$30,000	\$30,000	\$0
64	Canons Travel		\$30,000	\$30,000	\$0
65	Non-Canon Staff Travel & Continuing Ed.		\$15,000	\$15,000	\$0
66	Property manager shared with Trinity		\$12,000	\$12,000	\$0
67	DH Capital Maintenance Fund		\$10,000	\$10,000	\$0
68	Diocesan House Renovation Funds		\$19,800	\$19,800	\$0
69	Communications (e-DUSC, Web, on-line registrations)		\$25,000	\$25,000	\$0
70	Bishop Search Expenditures		\$150,000	\$50,000	(\$100,000)
Support for Holy Orders Process					
71	Seminarian Insurance		\$0	\$12,000	\$12,000
72	Curacy Program		\$0	\$30,000	\$30,000
Diocesan Prayer Ministry					
73	Daughters of the King			\$0	
Subtotal - Office of the Bishop			\$1,360,606	\$1,346,300	(\$14,306)

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2022 SOM

Last Updated: 10.26.2021

<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021		Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2021 SOM
<i>Bishop's Events:</i>					
74	Clergy Business Day		\$0	\$1,000	\$1,000
75	Ordinations - Diaconate		\$0	\$1,000	\$1,000
76	Ordinations - Priesthood		\$0	\$1,000	\$1,000
77	Ordinations - Transitional Diaconate		\$0	\$1,000	\$1,000
78	Renewal of Vows		\$500	\$500	\$0
79	Celebrations of New Ministries		\$0	\$1,000	\$1,000
Subtotal - Bishop's Events			\$500	\$5,500	\$5,000
<i>Diocesan Institutions</i>					
80	All Saints', Clinton for facilities use		\$1,000	\$1,000	\$0
81	Still Hopes		\$1,000	\$1,000	\$0
82	Finlay House		\$500	\$500	\$0
83	Gravatt		\$1,000	\$1,000	\$0
84	Univ. of the South School of Theology (Sewanee)		\$4,000	\$4,000	\$0
85	Voorhees		\$1,500	\$1,500	\$0
86	Heathwood Hall Episcopal School		\$1,000	\$1,000	\$0
87	Kanuga		\$0	\$1,000	\$1,000
Subtotal - Diocesan Institutions			\$10,000	\$11,000	\$1,000
<i>Diocesan Convention</i>					
88	Diocesan Convention - Leadership Day & Business Day		\$15,000	\$15,000	\$0
89	Convention Secretary		\$2,400	\$2,400	\$0
Subtotal - Diocesan Convention			\$17,400	\$17,400	\$0
90	<i>Diocesan Executive Council</i>				
91	Diocesan Executive Council		\$500	\$1,000	\$500
92	D.E.C. Orientation & Planning		\$500	\$1,500	\$1,000
93	Audit & Accounting Services		\$20,000	\$20,000	\$0
94	Insurance - Property, Liability, Bond		\$15,000	\$15,000	\$0
95	Real Property Expenses		\$5,000	\$5,000	\$0
96	NEW - Diocesan Chancellors		\$3,000	\$3,000	\$0
Subtotal - Diocesan Executive Council			\$44,000	\$45,500	\$1,500
Commission on the Diocese			\$2,223,626	\$2,250,076	\$26,450

The Episcopal Diocese of Upper South Carolina
Approved for Convention 2022 SOM

Last Updated: 10.26.2021

	<i>Approved 2022 SOM</i> Approved for Convention by Diocesan Executive Council on 08.28.2021	Notes	2021 SOM Approved by Convention	2022 SOM Adjusted Allocations	2022 vs. 2021 SOM
Notes:					
B	DEC approved request to go back to PPO 90 from PPO 80.				
	<u>Comm. on The Episcopal Church & The Anglican Communion</u>				
97	Province IV Pledge		\$3,552	\$0	(\$3,552)
98	Diocesan Pledge to The Episcopal Church		\$290,467	\$301,364	\$10,897
99	Deputies to General & Synod Convention		\$15,000	\$15,000	\$0
100	Lambeth Conference		\$5,000	\$5,000	\$0
101	Ecumenical Relations		\$1,000	\$0	(\$1,000)
	Comm. on The Episcopal Church & The Anglican Communion		\$315,019	\$321,364	\$6,345
	<u>Commission on Mission & International Concerns</u>				
102	Episcopal Relief & Development		\$500	\$500	\$0
103	Sustainable Development (Millennium) Goals		\$0	\$18,000	\$18,000
104	World Mission Committee - Cange		\$24,325	\$15,000	(\$9,325)
105	Ecuador Programs		\$24,325	\$15,000	(\$9,325)
106	SC Bishops' Public Education Initiative		\$14,350	\$15,000	\$650
107	Camp AIR (Adventures in Reading)		\$1,000	\$1,000	\$0
108	Matthew 25 Outreach Grants		\$15,000	\$16,000	\$1,000
109	Racial Reconciliation		\$500	\$2,000	\$1,500
110	HIV/AIDS Committee		\$1,000	\$1,350	\$350
111	Voorhees Scholars Program		\$5,000	\$5,000	\$0
112	Environmental Stewardship and Justice		\$500	\$1,500	\$1,000
113	Young Adult Service Corps		\$0	\$0	\$0
114	New - SC Christian Action Council		\$0	\$500	\$500
	Commission on Mission & International Concerns		\$86,500	\$90,850	\$4,350
Notes:					
ADJ	2021 Adjusted Expense budget increase Commision on Ministry \$20,000 Commision on Christian Formation \$20,000 Commission on Congregations \$60,000 Comission on Mission & Internal Concerns \$20,000. Approved by DEC 8.28.2021				
115	Total Expenses		\$2,903,243	\$2,894,890	(\$8,353)
116	Net (over)/under		\$2,236	(\$49,000)	
					62

EDUSC Congregational Health Report

Data Breakdown

An Overview of Pledges, Audits, and Parochial Reports by Congregation: 2016-2020

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	92%	Pledge	\$ 9,193	96%	275%	\$ 397	96%
			Audit						80%
			Parochial						100%
St Augustine of Canterbury	Aiken	Mission	87%	Pledge	\$ 23,634	100%	104%	\$ (2)	100%
			Audit						60%
			Parochial						100%
St Thaddeus Episcopal Church	Aiken	Parish	96%	Pledge	\$ 116,055	89%	95%	\$ 12,736	89%
			Audit						100%
			Parochial						100%
Grace Episcopal Church	Anderson	Parish	100%	Pledge	\$ 55,434	100%	100%	\$ (0)	100%
			Audit						100%
			Parochial						100%
St George Episcopal Church	Anderson	Parish	100%	Pledge	\$ 9,175	100%	100%	\$ 0	100%
			Audit						100%
			Parochial						100%
All Saints Episcopal Church	Beech Island	Mission	66%	Pledge	\$ 5,894	97%	100%	\$ 178	97%
			Audit						0%
			Parochial						100%
St Margarets Episcopal Church	Boiling Springs	Parish	69%	Pledge	\$ 22,688	28%	80%	\$ 16,274	28%
			Audit						80%
			Parochial						100%
Grace Episcopal Church	Camden	Parish	71%	Pledge	\$ 59,092	53%	175%	\$ 27,905	53%
			Audit						60%
			Parochial						100%
All Saints Episcopal Church	Cayce	Parish	88%	Pledge	\$ 19,367	64%	95%	\$ 6,999	64%
			Audit						100%
			Parochial						100%
St Francis of Assisi	Chapin	Parish	93%	Pledge	\$ 51,854	100%	100%	\$ 0	100%
			Audit						100%
			Parochial						80%
St Marks Episcopal Church	Chester	Mission	59%	Pledge	\$ 5,488	77%	80%	\$ 1,261	77%
			Audit						20%
			Parochial						80%
Holy Trinity Episcopal Parish	Clemson	Parish	100%	Pledge	\$ 82,208	101%	100%	\$ (806)	101%
			Audit						100%
			Parochial						100%
All Saints Episcopal Church	Clinton	Parish	81%	Pledge	\$ 23,000	102%	100%	\$ (559)	102%
			Audit						40%
			Parochial						100%
Church of the Cross	Columbia	Mission	76%	Pledge	\$ 11,778	107%	85%	\$ (844)	107%
			Audit						20%
			Parochial						100%
Church of the Good Shepherd	Columbia	Parish	88%	Pledge	\$ 65,811	64%	100%	\$ 23,776	64%
			Audit						100%
			Parochial						100%

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St Davids Episcopal Church	Columbia	Parish	87%	Pledge	\$ 53,871	101%	100%	\$ (406)	101%
				Audit					60%
				Parochial					100%
St Johns Episcopal Church	Columbia	Parish	93%	Pledge	\$ 143,991	100%	100%	\$ 0	100%
				Audit					80%
				Parochial					100%
St Lukes Episcopal Church	Columbia	Parish	93%	Pledge	\$ 34,900	98%	102%	\$ 717	98%
				Audit					80%
				Parochial					100%
St Martins in the Fields	Columbia	Parish	88%	Pledge	\$ 130,071	104%	100%	\$ (5,200)	104%
				Audit					60%
				Parochial					100%
St Marys Episcopal Church	Columbia	Parish	69%	Pledge	\$ 76,318	48%	100%	\$ 39,889	48%
				Audit					60%
				Parochial					100%
St Michael and All Angels	Columbia	Mission	84%	Pledge	\$ 51,649	52%	100%	\$ 24,841	52%
				Audit					100%
				Parochial					100%
St Timothys Episcopal Church	Columbia	Parish	92%	Pledge	\$ 20,856	76%	100%	\$ 4,915	76%
				Audit					100%
				Parochial					100%
Trinity Cathedral Church	Columbia	Parish	82%	Pledge	\$ 463,727	86%	100%	\$ 63,912	86%
				Audit					60%
				Parochial					100%
St Michaels Episcopal Church	Easley	Parish	76%	Pledge	\$ 34,375	68%	101%	\$ 11,114	68%
				Audit					60%
				Parochial					100%
St Thomas Church	Eastover	Mission	47%	Pledge	\$ 3,986	102%	90%	\$ (80)	102%
				Audit					0%
				Parochial					40%
St Pauls Episcopal Church	Fort Mill	Parish	88%	Pledge	\$ 31,761	65%	100%	\$ 11,186	65%
				Audit					100%
				Parochial					100%
Episcopal Church of the Incarnation	Gaffney	Parish	47%	Pledge	\$ 22,105	22%	100%	\$ 17,323	22%
				Audit					20%
				Parochial					100%
Calvary Episcopal Church	Glenn Springs	Mission	59%	Pledge	\$ 7,001	76%	97%	\$ 1,646	76%
				Audit					0%
				Parochial					100%
St Pauls Episcopal Church	Graniteville	Parish	46%	Pledge	\$ 8,797	18%	76%	\$ 7,255	18%
				Audit					20%
				Parochial					100%
St Peters Episcopal Church	Great Falls	Mission	93%	Pledge	\$ 3,915	100%	100%	\$ (0)	100%
				Audit					80%
				Parochial					100%
Christ Episcopal Church	Greenville	Parish	76%	Pledge	\$ 443,675	67%	102%	\$ 144,920	67%
				Audit					60%
				Parochial					100%
Church of the Redeemer	Greenville	Parish	96%	Pledge	\$ 41,465	89%	100%	\$ 4,498	89%
				Audit					100%
				Parochial					100%

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St Andrews Episcopal Church	Greenville	Parish	83%	Pledge	\$ 30,257	69%	100%	\$ 9,411	69%
				Audit					80%
				Parochial					100%
St Francis Episcopal Church	Greenville	Parish	36%	Pledge	\$ 7,566	9%	20%	\$ 6,849	9%
				Audit					0%
				Parochial					100%
St James Episcopal Church	Greenville	Parish	78%	Pledge	\$ 86,155	75%	100%	\$ 21,523	75%
				Audit					80%
				Parochial					80%
St Peters Episcopal Church	Greenville	Parish	100%	Pledge	\$ 77,213	100%	100%	\$ 0	100%
				Audit					100%
				Parochial					100%
St Philips Church	Greenville	Mission	74%	Pledge	\$ 8,161	101%	100%	\$ (117)	101%
				Audit					20%
				Parochial					100%
Church of the Resurrection	Greenwood	Parish	93%	Pledge	\$ 61,055	100%	100%	\$ (0)	100%
				Audit					80%
				Parochial					100%
Church of the Good Shepherd	Greer	Parish	100%	Pledge	\$ 19,396	100%	100%	\$ (7)	100%
				Audit					100%
				Parochial					100%
St Johns Episcopal Church	Hopkins	Parish	96%	Pledge	\$ 20,328	88%	100%	\$ 2,504	88%
				Audit					100%
				Parochial					100%
Epis Ch of St Simon & St Jude	Irmo	Parish	67%	Pledge	\$ 35,520	81%	107%	\$ 6,689	81%
				Audit					20%
				Parochial					100%
St Barnabas Episcopal Church	Jenkinsville	Mission	94%	Pledge	\$ 5,718	102%	100%	\$ (87)	102%
				Audit					100%
				Parochial					80%
Christ Episcopal Church	Lancaster	Parish	68%	Pledge	\$ 19,736	4%	57%	\$ 18,852	4%
				Audit					100%
				Parochial					100%
Church of the Epiphany	Laurens	Parish	41%	Pledge	\$ 11,320	43%	85%	\$ 6,440	43%
				Audit					0%
				Parochial					80%
St Albans Episcopal Church	Lexington	Parish	100%	Pledge	\$ 37,797	100%	100%	\$ 0	100%
				Audit					100%
				Parochial					100%
St Lukes Episcopal Church	Newberry	Mission	62%	Pledge	\$ 13,252	27%	100%	\$ 9,729	27%
				Audit					60%
				Parochial					100%
St Bartholomews Episcopal Church	North Augusta	Mission	78%	Pledge	\$ 62,484	53%	86%	\$ 29,246	53%
				Audit					80%
				Parochial					100%
St Stephens Episcopal Church	Ridgeway	Mission	87%	Pledge	\$ 13,521	101%	100%	\$ (138)	101%
				Audit					100%
				Parochial					60%
Episcopal Church of Our Saviour	Rock Hill	Parish	83%	Pledge	\$ 63,069	70%	100%	\$ 19,189	70%
				Audit					80%
				Parochial					100%

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Church of the Ascension	Seneca	Parish	67%	Pledge	\$ 26,204	40%	74%	\$ 15,742	40%
				Audit					60%
				Parochial					100%
Holy Cross Episcopal Church	Simpsonville	Parish	84%	Pledge	\$ 80,324	71%	75%	\$ 23,574	71%
				Audit					80%
				Parochial					100%
Episcopal Church of the Advent	Spartanburg	Parish	83%	Pledge	\$ 283,982	90%	100%	\$ 28,004	90%
				Audit					60%
				Parochial					100%
Episcopal Church of the Epiphany	Spartanburg	Mission	60%	Pledge	\$ 7,150	59%	280%	\$ 2,939	59%
				Audit					20%
				Parochial					100%
St Christophers Church Episcopal	Spartanburg	Mission	77%	Pledge	\$ 36,101	30%	102%	\$ 25,123	30%
				Audit					100%
				Parochial					100%
St Matthews Episcopal Church	Spartanburg	Parish	93%	Pledge	\$ 57,557	100%	97%	\$ (0)	100%
				Audit					80%
				Parochial					100%
Episcopal Church of the Ridge	Trenton	Mission	93%	Pledge	\$ 22,291	100%	100%	\$ (19)	100%
				Audit					80%
				Parochial					100%
Church of the Nativity	Union	Mission	46%	Pledge	\$ 7,880	57%	100%	\$ 3,370	57%
				Audit					0%
				Parochial					80%
St Johns Episcopal Church	Winnsboro	Parish	87%	Pledge	\$ 10,666	100%	100%	\$ 0	100%
				Audit					60%
				Parochial					100%
Church of the Good Shepherd	York	Parish	100%	Pledge	\$ 27,394	100%	98%	\$ 0	100%
				Audit					100%
				Parochial					100%

Pledge Acceptance Total	\$ 3,265,235	80%	\$ 642,661	Unaccepted Pledge Total
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