

## General Convention of The Episcopal Church 2022 Archives' Research Report

**Resolution No.:** 2022-A155  
**Title:** Revising the Parochial Report Finance Page  
**Proposer:** House of Deputies Committee on the State of the Church  
**Topic:** Parochial Reports

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### **Directly Related:** (Attached)

2018-A053      Simplify and Improve Usability of Parochial Report

**Indirectly Related:** (Available in the [Acts of Convention](#) database, searchable by resolution number)

None

*In preparing this report, the Archives researched the resolutions in the Acts of Convention database for the period 1973 through 2018, selecting “direct” resolutions that have a substantive bearing on the proposed legislation. The “direct” resolutions are attached and “indirect” resolutions are available in the Acts of Convention database. Committee members who require other research assistance should contact the Archives through the [Research Request Form](#) or call 800-525-9329.*

# A155 - Revising the Parochial Report Finance Page

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**Final Status:** Not Yet Finalized

**Proposed by:** House of Deputies Committee on the State of the Church

**Requests New Interim Body:** Yes

**Amends C&C or Rules of Order:** No

**Has Budget Implications:** Yes

**Cost:** \$50,000.00

**HiA:** HB

**Legislative Committee Currently Assigned:** 10 - Congregational & Diocesan Vitality

**Completion Status:** Incomplete

**Latest House Action:** N/A

**Supporting Documents:** No

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## Resolution Text

*Resolved*, the House of \_\_\_\_\_ concurring,

That the 80th General Convention authorizes the creation of a task force of congregational treasurers and diocesan financial officers to revise the finance page of the parochial report; and be it further

*Resolved*, that the Presiding Bishop and President of the House of Deputies appoint between 12 and 18 people to serve as members of this task force, to include representatives from every province of The Episcopal Church, and include at least 6 congregational treasurers.

*Resolved*, that the task force consult with the General Convention Office; and be it further

*Resolved*, that the task force collect and utilize data on diocesan-level use of parochial reports to determine diocesan assessments and apportionment; consider issues of currency conversion for international dioceses; evaluate current requirements on calculating and reporting operating income and expenses; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$50,000 for the implementation of this resolution.

## Explanation

In its work on revising the parochial report, the House of Deputies Committee on the State of the Church identified two themes in the feedback it received about the financial page of the parochial report. Parish treasurers frequently comment that the finance page is too complicated and confusing. Diocesan finance officers comment that critical information about congregational debt and endowment use is missing. While Executive Council added questions about debt and endowment to the 2022 parochial report form on the recommendation of the State of the Church Committee, the committee determined that it did not have members with the skill sets and experience needed to undertake a full revision of the report's finance page, and that a task force for this specific purpose would better serve the church.

In particular, the task force should review the practices for reporting congregational operating income and expenses. In the current report, these two numbers are expected to be equal, but that is not always the case; the situation of many congregations that received PPP loans in 2021 that were forgiven in 2022 highlighted this limitation of the report format. These issues bear particular scrutiny because both the report's operating income and operating expense lines are used by various dioceses to set diocesan assessments.





**Resolution Number:** 2018-A053

**Title:** Simplify and Improve Usability of Parochial Report

**Legislative Action Taken:** Concurred as Amended

**Final Text:**

*Resolved, That the 79th General Convention charge the House of Deputies Committee on the State of the Church to work with the Office of the General Convention and Executive Council to design a simplified parochial report relevant to the diversity of The Episcopal Church's participation in God's mission in the world; and be it further*

*Resolved, That the House of Deputies Committee on the State of the Church solicit input from critical parochial report stakeholders including: (1) data providers to ensure that the data is easily collected and compiled and (2) data users to ensure that the data collected is relevant to their work; and be it further*

*Resolved, That the user interface be improved both for entering data and downloading data and to provide an application programming interface to allow data to be integrated into other networked tools for broader sharing and analysis.*

**Citation:** General Convention, *Journal of the General Convention of...The Episcopal Church, Austin, 2018* (New York: General Convention, 2018), p. 362.