

General Convention of The Episcopal Church 2024 Archives' Research Report

Resolution No.: 2024-C004
Title: The Episcopal Church Diocesan Assessment
Proposer: Oklahoma
Topic: Program, Budget and Finance

Directly Related: (Attached)

2022-A228 Adopt the Proposed 2023-2024 Budget

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 2022, 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](#).

C004 - The Episcopal Church Diocesan Assessment

Final Status: Not Yet Finalized

Proposed by: Oklahoma

Has Budget Implications: No

Cost:

Amends C&C or Rules of Order: No

Requests New Interim Body: No

Changes Mandate Of Existing Ib: No

Directs Dfms Staff: No

Directs Dioceses: No

Directs Executive Council: Yes

HiA: No House Assigned

Legislative Committee Currently Assigned: No Committee Assigned

Completion Status: Incomplete

Latest House Action: N/A

Supporting Documents: No

Resolution Text

Resolved, the House of _____ concurring,

That the 81st General Convention approves an assessment formula (Canon I.4.6.b) for the period January 1, 2025 through December 31, 2027 based on a single assessment of each diocese. In each year, 2025-2027, the diocesan total adjusted operating income, as reported in the annual diocesan financial report (Canon I.4.6.i and Canon I.6.4) for the year two years prior to the year to which the assessment is applied [e.g., 2025 assessments are to be based on 2023-2024 actual income figures], shall be reduced by a \$200,000 exemption. A single assessment shall be applied to the remaining amount (balance) at a flat rate of 13.5% ; and be it further

Resolved, That the 2025-2027 Episcopal Church budget shall be adjusted and managed as set forth in the Canons, Rules of Order, and Executive Council policies and procedures; and be it further

Resolved, That the 81st General Convention of the Episcopal Church asks Executive Council to set a plan for lowering the diocesan assessment to 10% by 2030.

Explanation

In our post-covid and ever-changing world, more and more congregation's budgets are feeling the strains of ministry - from building maintenance, to appropriate ministry staff, to rising healthcare costs. Now more than ever, it is crucial to keep more resources local so that ministry can thrive on the congregational and diocesan level.

This resolution asks the Executive Council of The Episcopal Church to do the hard and discerning work of planning for our future as a denomination. With over \$400,000,000 in endowments, The Episcopal Church (DFMS) has a \$50,000,000 annualized budget. Based on Line Item 9 of The Episcopal Church's approved budget, Diocesan Commitments make up over \$28,000,000 of that amount. That amount is 15% (the previous assessment rate) of \$192,000,000. This means that over 20% of all DFMS and Diocesan expenditures each year (\$242,000,000) are done at the DFMS level. The Episcopal Church is top heavy.

Every organization in the 21st century is retooling for the next generation and the Episcopal Church must do the same. It is out of love for The Episcopal Church, its ministry, history, and future, that we submit this resolution.