

2025 Proposed Budget & Apportionment (09/20/24)

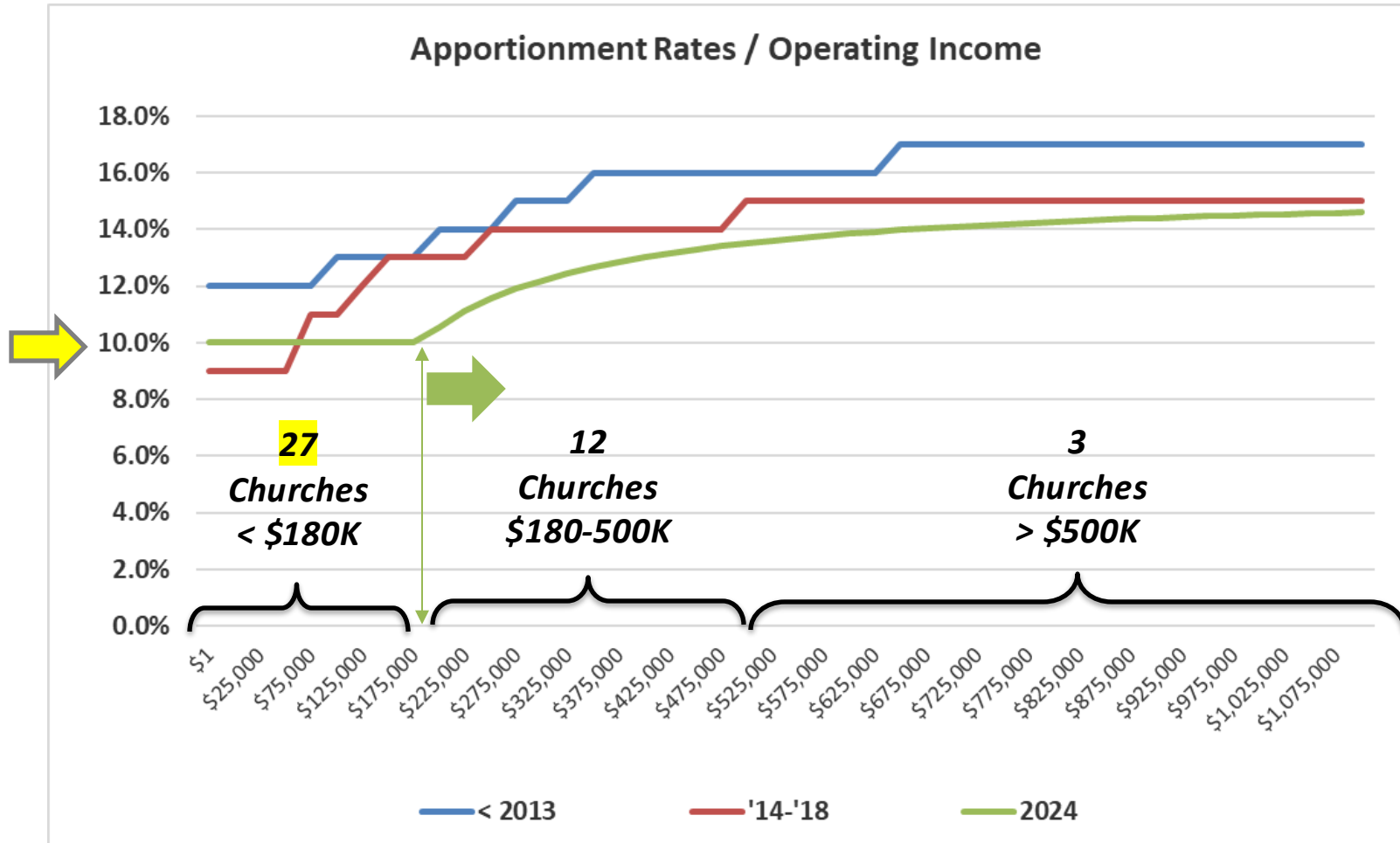


MISSION STATEMENT: *Grow and develop congregations spiritually, numerically and in missional leadership.*

FOCUS: *Relationship, Leadership & Stewardship*

2024 Apportionment Rates (Exhibit #1)

10% Rate up to \$180K Normal Operating Income



(27) churches (64%) with NOI < \$180K: Average effective Rate = 10.1%

2025 Apportionment Formula

(Exhibit #2)

Based on Parish Normal Operating Income (NOI):

- **10% of the first \$200,000** of operating income
- And **15.5%** of income > \$200,000
- Apply a **5%** “cap & floor”, to limit annual increases/decreases
- Apply a “cap on *Effective Rate*” (= *Formula Rate* + 3% pts.)

*Expanding the 10% rate range to \$200,000, maintaining a 5% “cap & floor”, and a “cap” on effective rate, results in **2025 Apportionment of: \$967,403**, down \$7,540 (-0.8%) from 2024.*

2025 Draw from Investments (Exhibit #3)

YE Audit Data thru 2023 (\$ M.'s)
Adj. for FHFO & Non-Op. Exp.

	2021	2022	2023	Est. 2024	Projected 2025	2026	2027		Assumptions:
Apportionment	\$1.013	0.988	\$0.992	\$0.975	\$0.967	\$0.960	\$0.950	-1.1%	Annual growth
Draw from Investments	\$0.893	0.951	\$1.024	\$1.240	\$1.075	\$1.143	\$1.194		
Loan Interest	\$0.023	0.020	\$0.014	\$0.015	\$0.015	\$0.013	\$0.013	3.1%	Avg. yield
Other Income	\$0.103	0.022	\$0.012	\$0.015	\$0.000	\$0.000	\$0.000	-100.0%	Grants/ABA
TOTAL INCOME	\$2.031	\$1.979	\$2.043	\$2.245	\$2.057	\$2.115	\$2.157		
TOTAL EXPENSE	\$2.021	\$1.955	\$2.005	\$2.249	\$2.057	\$2.115	\$2.157	1.1%	Annual growth
NET SURPLUS/(DEFICIT)	0.010	0.024	0.038	(0.005)	0.000	0.000	0.000		
Net Draw / Fin. Assets:	\$0.906	\$0.946	\$1.000	\$1.259	\$1.090	1.155	1.207	5.0%	Annual growth
Loans & Mortgages *	\$0.7	\$0.5	\$0.4	\$0.4	\$0.4	\$0.4	\$0.4	0.0%	Annual growth
Cash & Investments	\$26.0	\$21.4	\$23.9	\$24.4	\$25.0	\$25.6	\$26.2	7.0%	Avg. Returns
Net Financial Assets **	\$26.7	\$21.9	\$24.3	\$24.8	\$25.4	\$26.0	\$26.6		
Trailing, Audited 5-YR Avg.	\$20.5	\$21.2	\$22.5	\$22.9	\$23.3	\$24.1	\$24.5		
(% Trailing 5-YR Avg.)	4.4%	4.5%	4.4%	5.5%	4.7%	4.8%	4.9%		
Current Draw/Cash & Invest.	3.4%	4.3%	4.1%	5.1%	4.3%	4.5%	4.6%		

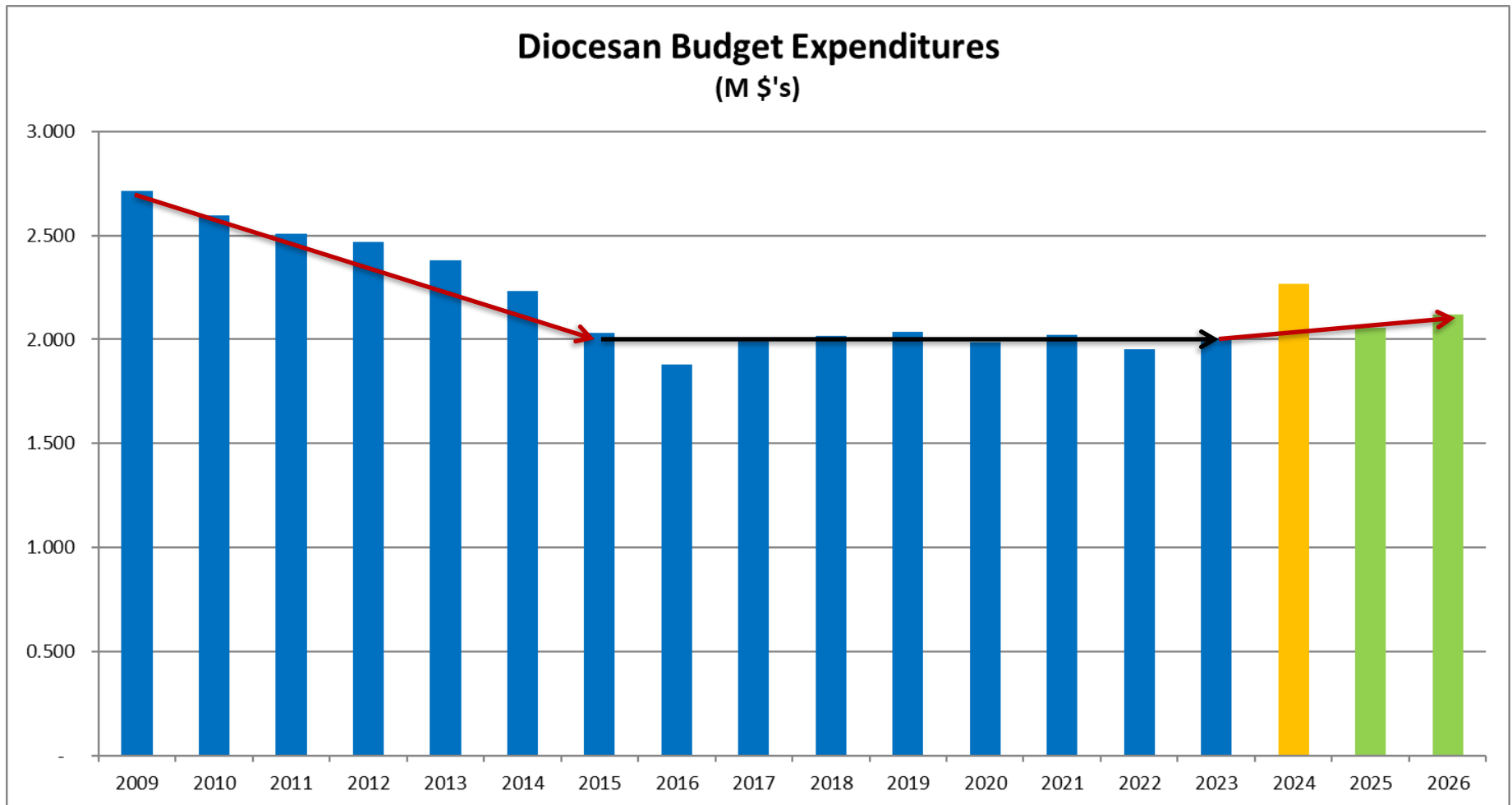
* Excludes restricted loan funds

** Excludes liabilities for PRHB

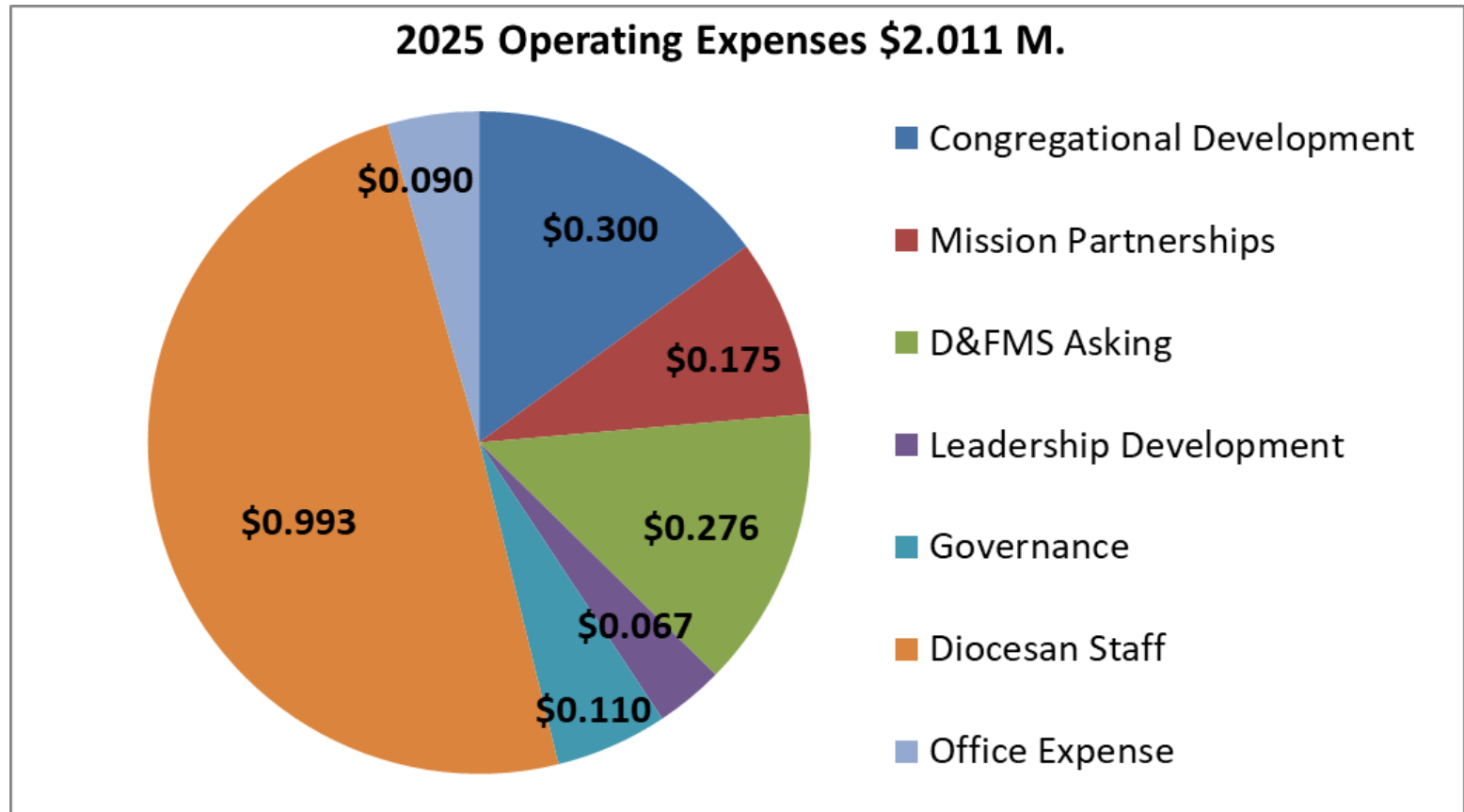
- Projected Apportionment of **\$967K**, combined with . . .
- **Draw of 4.7% (\$1.090 M.)**, and no *Other Income* . . .
- Provides total funding of **\$2.057 M. for 2025**

Diocesan Budget Expenditures

'09-'23 Actual, '24-'26 Projected (Exhibit #4)



Proposed 2025 Operating Budget (Exhibit #5)



PROGRAM: ~ \$818,000 (CDP & Mission Grants, D&FMS, Leadership)

ADMINISTRATION: ~ \$1,193,000 (Governance, Staff & Office Expenses)

PLUS: Non-Operating draw: \$46,000 (Post-retirement Health Benefits)

Proposed 2025 Operating Budget

(Exhibit #6)

	2023 Final	2024 <i>Budget</i>	2024 <i>Est.</i>	2025 <i>Budget</i>	Change vs. 2024 Budget	(%)	Notes
<i>Apportionment</i>	\$991,850	\$974,943	\$974,943	\$967,403	(\$7,540)	-1%	<i>New plan for Bishop's Appeal</i>
<i>Draw from Investments</i>	\$989,477	\$1,181,600	\$1,206,600	\$1,044,000	(\$137,600)	-12%	
<i>Other Income</i>	\$12,404	\$20,000	\$15,000	\$0	(\$20,000)	-100%	
Total Operating Income	\$1,993,731	\$2,176,543	\$2,196,543	\$2,011,403	(\$165,140)	-8%	<i>Lower Draw</i>
Congregational Development	\$312,833	\$315,000	\$300,000	\$300,000	(\$15,000)	-5%	<i>Impact of \$25K "cap"</i>
Mission Partnerships	\$172,460	\$175,000	\$175,000	\$175,000	\$0	0%	<i>No Change</i>
D&FMS Contribution	\$268,698	\$266,879	\$266,879	\$276,410	\$9,531	4%	<i>Higher Income in 2023</i>
Leadership Development	\$126,446	\$166,150	\$64,240	\$66,950	(\$99,200)	-60%	<i>PT Clergy Staffing changes</i>
Governance	\$114,379	\$256,000	\$275,500	\$109,950	(\$146,050)	-57%	<i>Bp. Trans./Gen. Conv.</i>
<i>Diocesan Staff - Salaries</i>	\$646,589	\$665,314	\$688,190	\$681,302	\$15,988	2%	<i>Staffing Changes + 4% salary</i>
<i>Diocesan Staff - Benefits</i>	\$213,119	\$221,200	\$280,441	\$286,791	\$65,591	30%	<i>Staffing Changes + 4% salary</i>
<i>Diocesan Staff - Expense</i>	\$18,935	\$20,000	\$53,137	\$25,000	\$5,000	25%	<i>Staffing Changes</i>
Diocesan Staff	\$878,643	\$906,514	\$1,021,768	\$993,093	\$86,579	10%	<i>Staffing Changes + 4%</i>
Office Expense	\$85,811	\$91,000	\$99,000	\$90,000	(\$1,000)	-1%	<i>Lower IT costs</i>
Total Operating Expense	\$1,959,270	\$2,176,543	\$2,202,387	\$2,011,403	(\$165,140)	-8%	<i>Bp. Trans./Gen. Conv.</i>
Operating Surplus/(Deficit)	\$34,461	\$0	(\$5,845)	\$0			

Expense reduction: Bp. Trans. & Gen. Conv., & cost neutral Staffing changes

Budget Detail: EXHIBITS # 7-11
&
Staffing Detail: EXHIBITS S1-S7

2025 Proposed Budget (Exhibit # 7)

Congregational Development & Mission Partnership

	2023 Final	2024 Budget	2024 Est.	2025 Budget	Change vs. 2024 Budget	(%)	Notes
<i>Unallocated CDP Grants</i>		\$187,000	\$23,917	\$95,600	(\$91,400)	-49%	NEW Grants TBD
2 Saints Rochester - CDG	\$14,000		\$25,000	\$24,000	\$24,000	#DIV/0!	
Ascension Rochester, CDG	\$25,000	\$25,000	\$25,000	\$24,000	(\$1,000)	-4%	
Hornell CDP			\$25,000	\$22,000	\$22,000	#DIV/0!	
Canandaigua, St. John's CDP	\$19,000		\$19,000	\$21,400	\$21,400	#DIV/0!	
Penn Yan Ministry leadership	\$40,000		\$25,000	\$20,000	\$20,000	#DIV/0!	
Epiphany, Gates CDP			\$25,000	\$20,000	\$20,000	#DIV/0!	
Trinity, Geneva		\$15,000	\$15,000	\$18,000	\$3,000	20%	
St. Mark's & St. John's, Rochester CDG	\$11,000	\$11,000	\$0	\$12,000	\$1,000	9%	
St. Andrew's, Caledonia CDP	\$12,500	\$12,000	\$12,000	\$11,500	(\$500)	-4%	
St. John's, Sodus CDG	\$12,000	\$11,500	\$11,500	\$11,000	(\$500)	-4%	
St. Luke's, Brockport CDG	\$11,000	\$10,000	\$10,000	\$9,000	(\$1,000)	-10%	
St. John's, Catharine CDP			\$9,000	\$8,000	\$8,000	#DIV/0!	
Geneseo, St. Michael's CDG	\$7,500		\$7,500	\$3,500	\$3,500	#DIV/0!	
Grace, Scottsville CDP	\$16,000		\$25,000	\$0	\$0	#DIV/0!	Renewal Grant TBD
Penfield, CDG	\$56,000	\$25,000	\$12,500	\$0	(\$25,000)	-100%	
South Wedge Mission CDP	\$13,500	\$12,000	\$12,000	\$0	(\$12,000)	-100%	Renewal Grant TBD
St. Peter's, Henrietta - CDP	\$30,000		\$7,500	\$0	\$0	#DIV/0!	
Rochester: Trinity-CDP	\$15,000		\$5,000	\$0	\$0	#DIV/0!	
Watkins Glen St James			\$4,000	\$0	\$0	#DIV/0!	
Zion, Avon CDP	\$7,000	\$6,500	\$1,083	\$0	(\$6,500)	-100%	
St. George's, Hilton 2012 CDG	\$23,333		\$0	\$0	\$0	#DIV/0!	
Congregational Development	\$312,833	\$315,000	\$300,000	\$300,000	(\$15,000)	-5%	Impact of \$25K "cap"
<i>Parish Grants - Unallocated</i>			\$0	\$2,375	\$2,375		\$800 for Convocation Grants
Episcopal Senior Life - CHAPLAIN	\$8,000	\$8,000	\$8,000	\$8,000	\$0	0%	Strategic Partnership
Monroe District Grants	\$4,380	\$5,000	\$5,000	\$25,800	\$20,800	416%	3 Convocations /\$600/church
Northeast District Grants	\$5,000	\$5,000	\$5,000	\$0	(\$5,000)	-100%	3 Convocations /\$600/church
Rochester District Grants	\$4,380	\$5,000	\$5,000	\$0	(\$5,000)	-100%	3 Convocations /\$600/church
Southeast District Grants	\$5,000	\$5,000	\$5,000	\$0	(\$5,000)	-100%	3 Convocations /\$600/church
Southwest District Grants	\$5,000	\$5,000	\$5,000	\$0	(\$5,000)	-100%	3 Convocations /\$600/church

2025 Proposed Budget (Exhibit # 8)

Mission Partnership (Parish Grants)

	2023 Final	2024 Budget	2024 Est.	2025 Budget	Change vs. 2024 Budget	(%)	Notes
Addison Food Pantry				\$6,000	\$6,000	#DIV/0!	Parish Grant 2025
Gleaner's Kitchen, Canandaigua		\$5,000	\$5,000	\$5,000	\$0	0%	Parish Grant 2025
Catharine - Bernie Parker Shed	\$6,000	\$6,000	\$6,000	\$5,000	(\$1,000)	-17%	Parish Grant 2025
Caledonia - Food Pantry		\$5,200	\$5,200	\$5,000	(\$200)	-4%	Parish Grant 2025
Lyons, Grace! Justice Celebrations			\$0	\$5,000	\$5,000	#DIV/0!	Parish Grant 2025
Palmyra, Grace House		\$7,000	\$7,000	\$5,000	(\$2,000)	-29%	Parish Grant 2025
Geneseo, Sing to the Lord - Family Choir				\$5,000	\$5,000	#DIV/0!	Parish Grant 2025
St. Peter's-Geneva Neighbor's Night	\$4,500	\$2,500	\$2,500	\$4,500	\$2,000	80%	Parish Grant 2025
Ascension - Program for Refugee Children		\$6,000	\$6,000	\$4,000	(\$2,000)	-33%	Parish Grant 2025
Sodus - Sunday Closet SNAP	\$5,000	\$4,500	\$4,500	\$2,000	(\$2,500)	-56%	Parish Grant 2025
Ascension - International Womens Day		\$2,000	\$2,000	\$2,000	\$0	0%	Parish Grant 2025
Clifton Springs - Coat Giveaway	\$1,200	\$2,000	\$2,000	\$2,000	\$0	0%	Parish Grant 2025
Catharine/Watkins Glen - Episcopal Church Women	\$1,500		\$0	\$1,700	\$1,700	#DIV/0!	Parish Grant 2025
Penn Yan, St. Mark's Sharing Shed	\$2,000		\$0	\$1,200	\$1,200	#DIV/0!	Parish Grant 2025
Clifton Springs, Agape Dinners	\$1,000	\$1,000	\$1,000	\$1,000	\$0	0%	Parish Grant 2025
Avon - Circle Nursery School Scholarships	\$6,500	\$5,100	\$5,100	\$0	(\$5,100)	-100%	Parish Grant 2024
St. Mark's & St. John's, Food shelf	\$5,000	\$4,500	\$4,500	\$0	(\$4,500)	-100%	Parish Grant 2024
St. Mark's & St. John's - Eden/Farm Stand	\$1,850	\$4,500	\$4,500	\$0	(\$4,500)	-100%	Parish Grant 2024
Christ Church, Roch. - Compline for the Community	\$4,500	\$4,000	\$4,000	\$0	(\$4,000)	-100%	Parish Grant 2024
South Wedge Mission - Peace & Meditation Garden	\$5,000	\$3,000	\$3,000	\$0	(\$3,000)	-100%	Parish Grant 2024
Zion, Palmyra - Community Dinners		\$3,000	\$3,000	\$0	(\$3,000)	-100%	Parish Grant 2024
Dansville, HOPE	\$0	\$1,500	\$1,500	\$0	(\$1,500)	-100%	Parish Grant 2024
Ascension - Holistic Development	\$8,000		\$0	\$0	\$0	#DIV/0!	Parish Grant 2023
Bath - Community labyrinth	\$7,000		\$0	\$0	\$0	#DIV/0!	Parish Grant 2023
Christ Church, Roch. - Online Outreach	\$6,200		\$0	\$0	\$0	#DIV/0!	Parish Grant 2023
Scottsville - Potters Field-Oatka Cemetary	\$3,650		\$0	\$0	\$0	#DIV/0!	Parish Grant 2023
Fairport - Safe Space	\$3,200		\$0	\$0	\$0	#DIV/0!	Parish Grant 2023
Hilton - Good News Garden	\$1,000		\$0	\$0	\$0	#DIV/0!	Parish Grant 2023
Brockport, Harvest Kitchen	(\$1,000)		\$0	\$0	\$0	#DIV/0!	Parish Grant 2022

2025 Proposed Budget (Exhibit # 9)

Mission Partnership (Outside Partners Grants) & DFMS

	2023 Final	2024 Budget	2024 Est.	2025 Budget	Change vs. 2024 Budget	(%)	Notes
Gates Chili Community Connections				\$7,200	\$7,200	█ #DIV/0!	Outside Partner Grant 2025
Pal Mac Food Pantry		\$5,600	\$5,600	\$6,650	\$1,050	19%	Outside Partner Grant 2025
Lutheran/Episcopal RIT - CHAPLAIN			\$0	\$5,000	\$5,000	█ #DIV/0!	Outside Partner Grant 2025
Sew Green	\$7,000	\$5,000	\$5,000	\$5,000	\$0	0%	Outside Partner Grant 2025
Family Promise of Ontario Cty		\$5,000	\$5,000	\$5,000	\$0	0%	Outside Partner Grant 2025
RMM - Justice for Farmworkers	\$5,000	\$4,000	\$4,000	\$4,750	\$750	19%	Outside Partner Grant 2025
Pro Action of Steuben and Yates, Inc.				\$4,750	\$4,750	█ #DIV/0!	Outside Partner Grant 2025
Catholic Charities of Steuben, Bath	\$3,000	\$5,000	\$5,000	\$4,500	(\$500)	-10%	Outside Partner Grant 2025
Literacy Volunteers - Yates/Ontario	\$4,400	\$5,000	\$5,000	\$4,275	(\$725)	-15%	Outside Partner Grant 2025
Genesee Area Campus Ministry - CHAPLAIN	\$4,000	\$3,500	\$3,500	\$4,000	\$500	14%	Outside Partner Grant 2025
Meal and More	\$4,000	\$4,000	\$4,000	\$4,000	\$0	0%	Outside Partner Grant 2025
Reentry Association of WNY - SMART	\$5,000	\$4,500	\$4,500	\$3,500	(\$1,000)	-22%	Outside Partner Grant 2025
Hands of Hope Kitchen			\$0	\$3,000	\$3,000	█ #DIV/0!	Outside Partner Grant 2025
St. Peter's, Geneva Arts Academy	\$3,000	\$2,400	\$2,400	\$2,500	\$100	4%	Outside Partner Grant 2025
Laundry Love, Dansville				\$2,000	\$2,000	█ #DIV/0!	Outside Partner Grant 2025
GRCC Faith in Action	\$2,500	\$2,000	\$2,000	\$1,800	(\$200)	-10%	Outside Partner Grant 2025
YMCA, Dansville		\$2,000	\$2,000	\$1,500	(\$500)	-25%	Outside Partner Grant 2025
Fostering Hope		\$7,200	\$7,200	\$0	(\$7,200)	-100%	Outside Partner Grant 2024
REACH Advocacy	\$7,000	\$5,000	\$5,000	\$0	(\$5,000)	-100%	Outside Partner Grant 2024
Family Promise of Rochester	\$5,000		\$0	\$0	\$0	█ #DIV/0!	Outside Partner Grant 2023
Cameron Community Ministries -	\$4,000		\$0	\$0	\$0	█ #DIV/0!	Outside Partner Grant 2023
Global Mission - Sustainable Development	\$15,000	\$15,000	\$15,000	\$15,000	\$0	0%	
Mission Partnerships	\$172,460	\$175,000	\$175,000	\$175,000	\$0	0%	
D&FMS Contribution	\$268,698	\$266,879	\$266,879	\$276,410	\$9,531	4%	Higher Income in 2023

2025 Proposed Budget (Exhibit # 10)

Leadership Development & Governance

	2023 Final	2024 Budget	2024 Est.	2025 Budget	Change vs. 2024 Budget	(%)	Notes
C.P.E. Program	\$6,000	\$6,000	\$6,000	\$6,000	\$0	0%	
Youth Programs & Events	(\$2,510)	\$2,500	\$1,000	\$2,500	\$0	0%	
CCD - Program	\$3,612	\$0	\$4,015	\$18,000	\$18,000	#DIV/0!	Sat. & Summer + Training
CCD - Trainers/Travel	\$33,976	\$32,000	\$0	\$0	(\$32,000)	-100%	CCD Director/VTS effective 1/1/24
Other Diocesan Clergy Roles - Stipends	\$37,077	\$45,200	\$11,250	\$0	(\$45,200)	-100%	Move to volunteer role
Other Diocesan Clergy Roles - Benefits	\$13,368	\$32,000	\$2,025	\$0	(\$32,000)	-100%	Move to volunteer role
Other Diocesan Clergy Roles - Expenses	\$0	\$4,000	\$0	\$2,000	(\$2,000)	-50%	Move to volunteer role
Educational Grants	\$9,950	\$18,000	\$12,000	\$12,000	(\$6,000)	-33%	Adjust to 3-YR Avg. + 20%
Interfaith & Ecumenical Relations: Stipend	\$2,950	\$2,950	\$2,950	\$2,950	\$0	0%	Interfaith & Ecumenical
Workshops, Programs & Events	\$5,208	\$7,500	\$6,000	\$6,000	(\$1,500)	-20%	Adjust to 3-YR Avg.
Stewardship Training/Programs	\$1,199	\$0	\$0	\$0	\$0	#DIV/0!	Consolidate: Workshop/Prog./Event
Colgate Rochester Crozer Divinity School	\$10,000	\$10,000	\$10,000	\$10,000	\$0	0%	
COM: Operating expenses	\$616	\$1,000	\$4,000	\$2,500	\$1,500	150%	New vendor
Deaf Ministry - Expense	\$0	\$0	\$0	\$5,000	\$5,000	#DIV/0!	NEW programming
Deaf Ministry - Interpreters	\$5,000	\$5,000	\$5,000	\$0	(\$5,000)	-100%	
Leadership Development	\$126,446	\$166,150	\$64,240	\$66,950	(\$99,200)	-60%	PT Clergy Staffing changes
District Deans Stipends	\$29,425	\$29,500	\$27,500	\$17,700	(\$11,800)	-40%	Move to 3 Convocations
Prison Ministry Committee	\$314	\$500	\$250	\$250	(\$250)	-50%	
Committee on RRH&J	\$0	\$500	\$0	\$0	(\$500)	-100%	
Committee for Gay Ministry	\$25	\$500	\$250	\$250	(\$250)	-50%	
Public Policy Committee	\$0	\$500	\$0	\$0	(\$500)	-100%	
Diocesan Convention	\$2,974	\$3,000	\$12,000	\$12,000	\$9,000	300%	In-person @ HWS
Diocesan Council	\$1,033	\$500	\$250	\$250	(\$250)	-50%	
Standing Committee	\$237	\$500	\$250	\$250	(\$250)	-50%	
Trustees & HR	\$211	\$500	\$250	\$250	(\$250)	-50%	
Diocesan Audit and Fiscal Manual	\$19,450	\$26,000	\$33,750	\$57,000	\$31,000	119%	Incl. NEW Outside Audits
Bishop - Transition	\$30,524	\$124,000	\$124,000	\$0	(\$124,000)	-100%	
Province II Assessment/Synod	\$1,000	\$1,000	\$1,000	\$1,000	\$0	0%	
Deputies to General Convention	\$0	\$40,000	\$37,000	\$0	(\$40,000)	-100%	
Legal & Professional Fees	\$2,496	\$5,000	\$3,000	\$3,000	(\$2,000)	-40%	Adjust to 3-YR Avg.
Litigation Expense	\$0	\$0	\$25,000	\$0	\$0	#DIV/0!	Trustee Authorized
Memberships & Sponsorships	\$6,500	\$12,000	\$5,000	\$6,000	(\$6,000)	-50%	Revised Est.
Ministry of the Bishop	\$20,190	\$12,000	\$6,000	\$12,000	\$0	0%	Revised Est.
Governance	\$114,379	\$256,000	\$275,500	\$109,950	(\$146,050)	-57%	Bp. Trans./Gen. Conv.

2025 Proposed Budget (Exhibit # 11)

Staff & Office Expense

	2023 Final	2024 <i>Budget</i>	2024 <i>Est.</i>	2025 <i>Budget</i>	Change vs. 2024 Budget	(%)	Notes
<i>Diocesan Staff - Salaries</i>	\$646,589	\$665,314	\$697,356	\$681,302	\$15,988	2%	<i>Staffing Changes + 4% salary</i>
<i>Diocesan Staff - Benefits</i>	\$213,119	\$221,200	\$276,867	\$286,791	\$65,591	30%	<i>Staffing Changes + 4% salary</i>
<i>Diocesan Staff - Expense</i>	\$18,935	\$20,000	\$54,306	\$25,000	\$5,000	25%	<i>Staffing Changes</i>
Diocesan Staff	\$878,643	\$906,514	\$1,028,530	\$993,093	\$86,579	10%	<i>Staffing Changes + 4%</i>
Communications /Public Relations	\$0	\$500	\$0	\$0	(\$500)	-100%	<i>Combine IT/Telcom</i>
Telecommunications	\$3,155	\$3,500	\$0	\$0	(\$3,500)	-100%	<i>Combine IT/Telcom</i>
Office Expense	\$40,333	\$43,000	\$42,000	\$42,000	(\$1,000)	-2%	
IT & Telecom	\$31,637	\$32,000	\$46,000	\$36,000	\$4,000	13%	<i>Combine IT/Telcom</i>
Diocesan Insurance	\$10,391	\$12,000	\$11,000	\$12,000	\$0	0%	<i>Diocesan Office only</i>
Bishop's Appeal Fundraising Expenses	\$295	\$0	\$0	\$0	\$0	#DIV/0!	<i>Combine w/ Office</i>
Office Expense	\$85,811	\$91,000	\$99,000	\$90,000	(\$1,000)	-1%	

Diocesan Staff Expense detailed on next slide

2025 Staffing (EXHIBIT S-1)

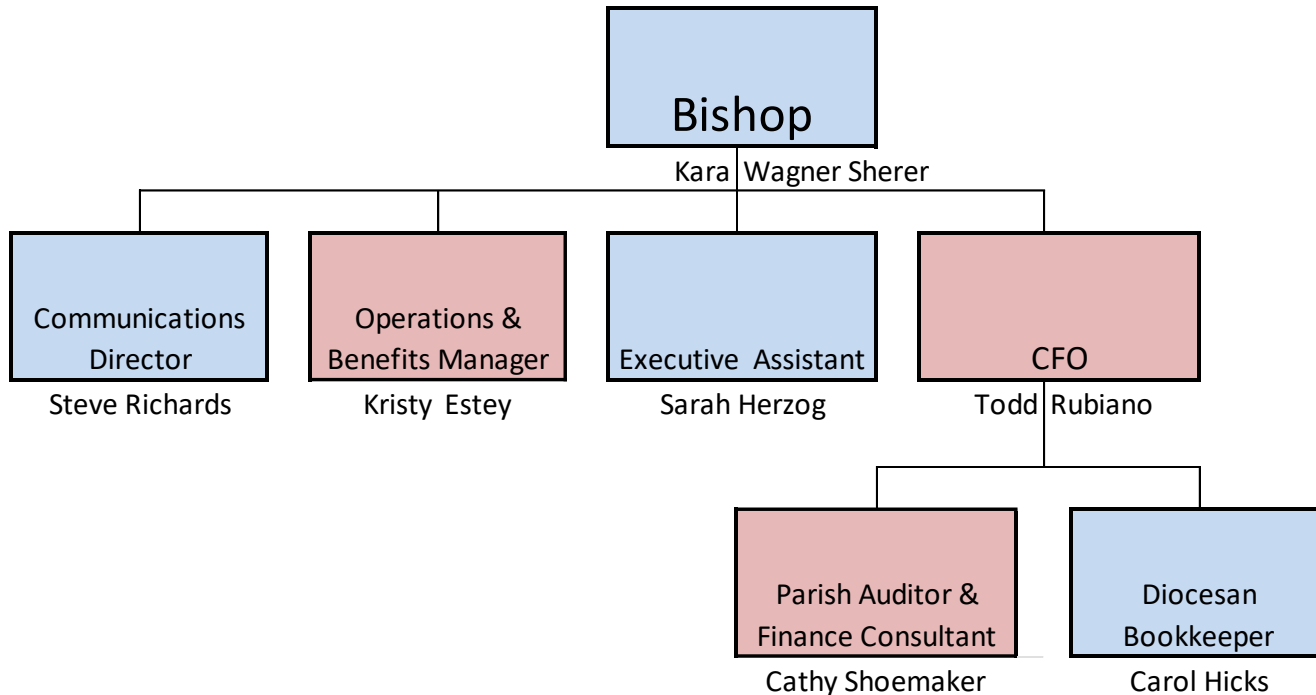
Diocesan Staff: Total Compensation

	FTE	Budget TOTAL	Expense Reimbursement
Bishop *	1.0	\$217,868	\$11,000
<i>Director of Ministry*</i>	1.0	\$170,076	\$5,000
<i>Director of Formation*</i>	0.5	\$76,900	\$3,000
<i>Director of Finance & Administration</i>	1.0	\$138,200	\$1,500
Operations & Benefits Manager	0.3	\$34,560	\$500
Parish Audit & Finance	0.4	\$39,520	\$500
<i>Director of Community Connections & Public Relations</i>	1.0	\$94,340	\$1,500
<i>Executive Administrator to the Bishop</i>	1.0	\$97,700	\$1,500
<i>Diocesan Bookkeeper, Payroll & Benefits Administration</i>	1.0	\$84,900	\$500
TOTAL:	7.2	\$954,064	\$25,000
<i>Pool for potential salary increases (eff. 01/01/25)</i>		\$20,538	
Expense Reimbursement		\$25,000	
Bishop (Benefit Offsets)		(\$13,509)	
NYS payroll related insurance		\$7,000	
TOTAL Diocesan Staff Budget		\$993,093	

- **Total Compensation includes:** Salary, Housing, *SECA, FICA, pension contributions, life, disability & health insurance.
- **Reimbursed expenses include:** Travel, continuing education, sabbatical, etc.
- **Pool for salary increases: 4% (01/01/25) for positions filled by 9/1/24**

Staffing Transition (EXHIBIT S-2)

Diocesan Lay Staff Roles

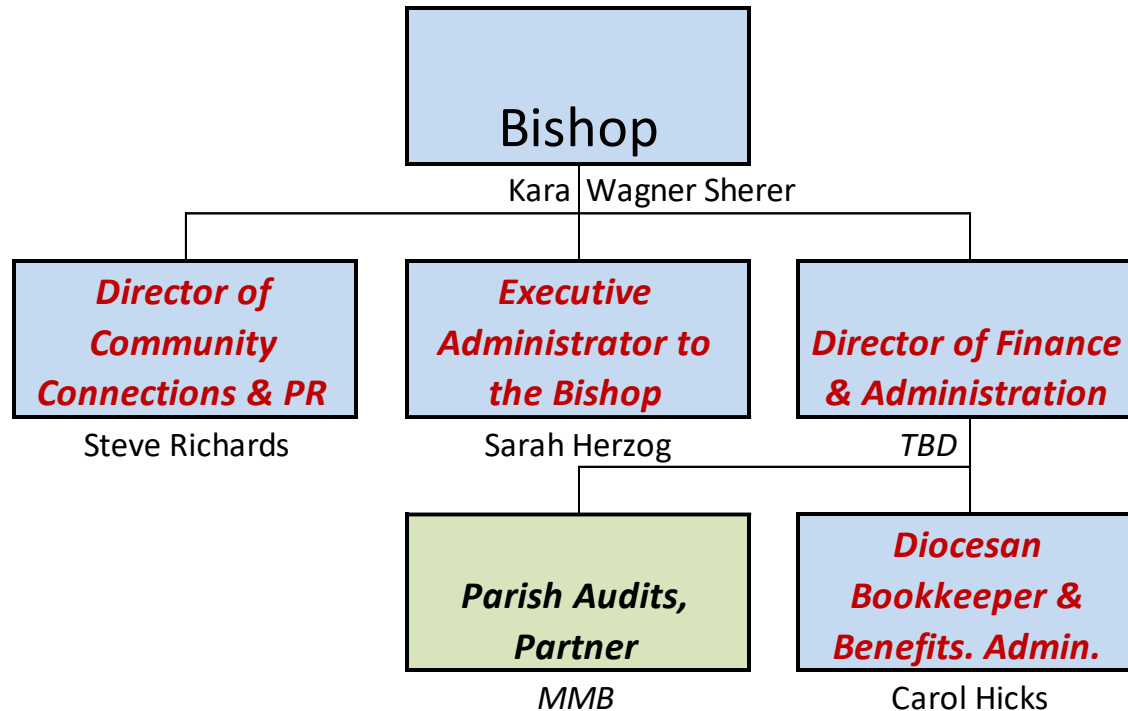


Was (6) full time, lay staff roles, supporting the Bishop & Leadership of the Diocese.

- *CFO* (PT as of 7/1/24, retires by 12/31/24)
- *Operations & Benefits Manager* (to retire 4/30/25)
- *Parish Auditor & Finance Consultant* (PT as of 1/1/25, to retire 6/30/25).

2025 Staffing (EXHIBIT S-3)

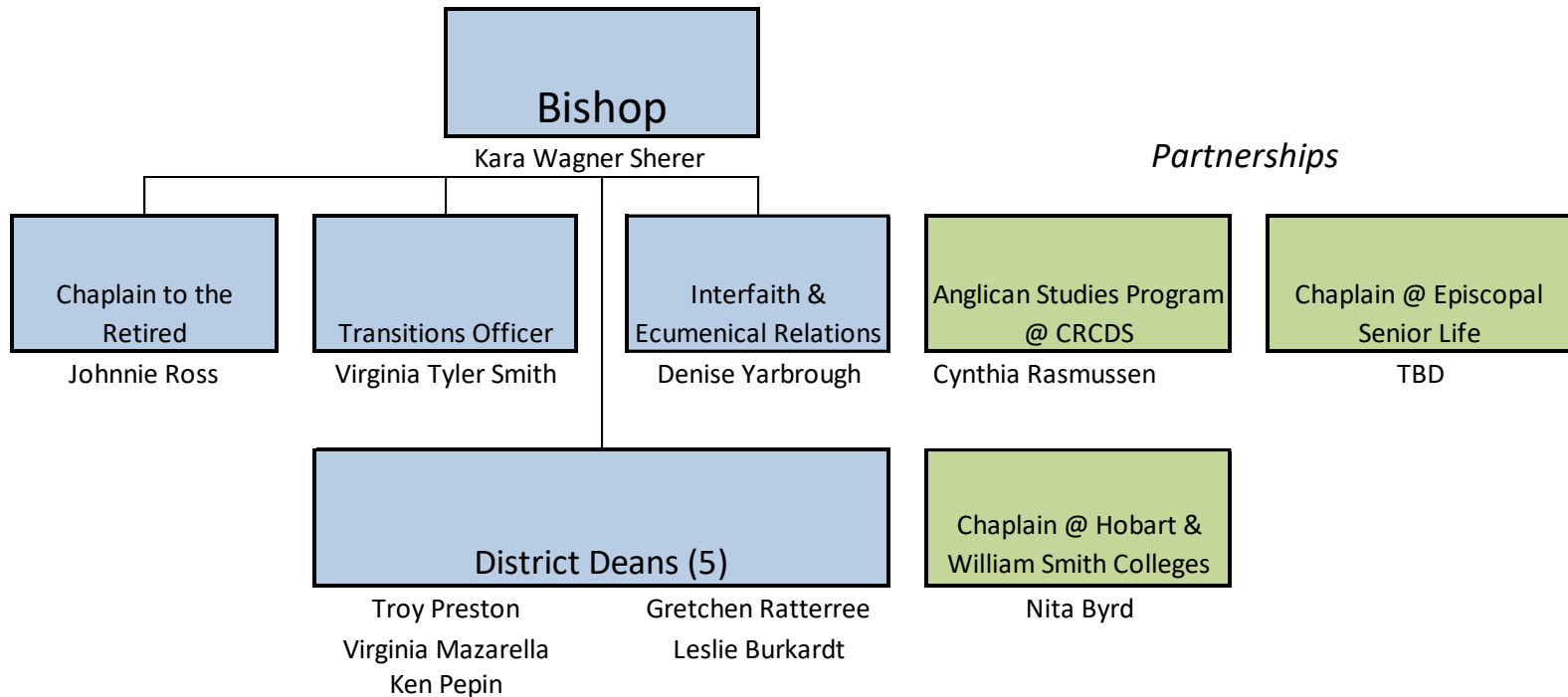
Diocesan Lay Staff Roles



New roles focusing on: Communications, streamlining Finance & HR and partnering with our outside audit firm, Mengel, Metzger, Barr & Co. (MMB), to provide Clergy Change Audits (Parishes < \$500K) allows for a smaller Lay Staff.

2024 Staffing (EXHIBIT S-4)

Diocesan Clergy Leadership Roles

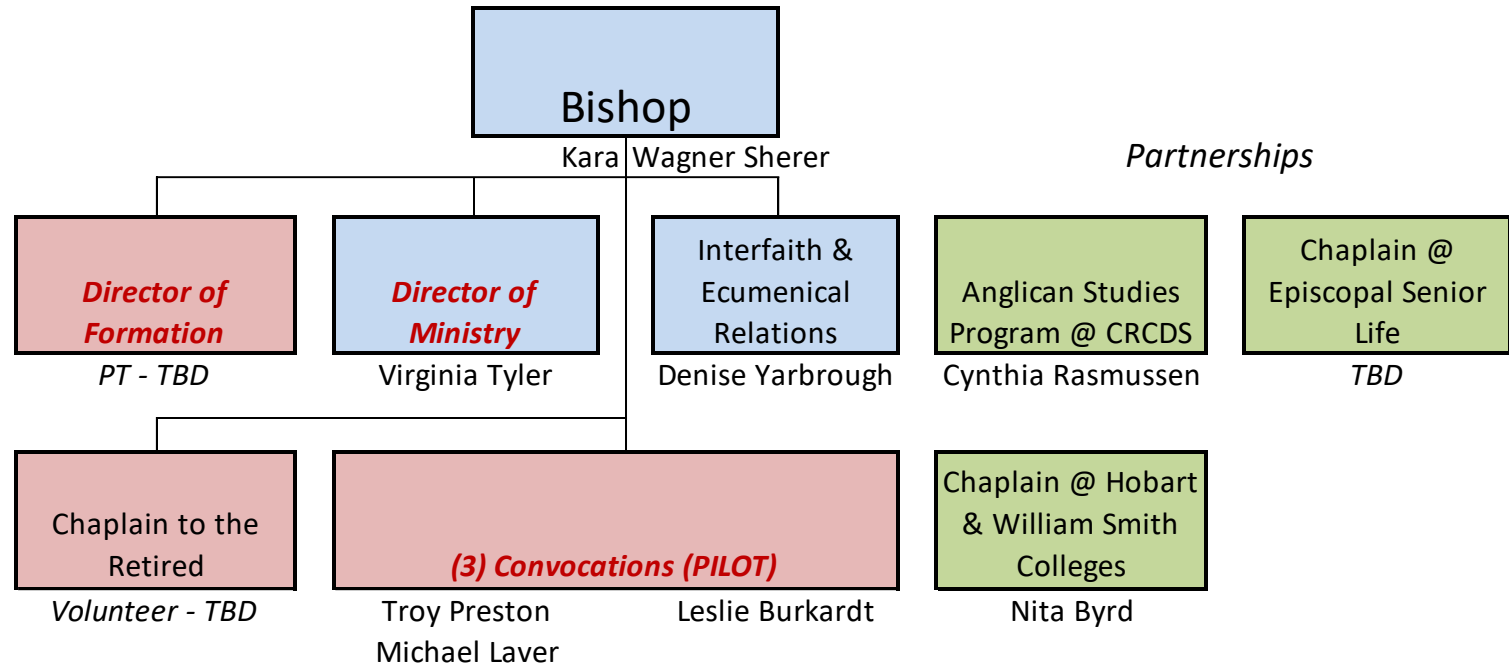


EFFECTIVE 1/1/24:

- Expanded role of *Transitions Officer* to FT, included: *Congregational Development* and the *Regional Minister PILOT*.
- Other (7) Diocesan Clergy roles were PT (*Excludes: 3 Partnership Roles*).

2025 Staffing (EXHIBIT S-5)

Diocesan Clergy Leadership Roles



- The FT role of *Transitions & Congregational Development* is renamed *Director of Ministry*; retaining the same duties plus oversight of diocesan events, as the pilot for Regional Ministry moves towards a more permanent, local position.
- A new ½ time role, *Director of Formation*, provides congregations with cradle-to-grave education resources, diocesan programming for all ages, and diocesan event support.
- The *Chaplain to the Retired* moves to a volunteer role at the conclusion of the current LOA (09/30/24).
- The proposed PILOT to move from (5) *Districts*, to (3) *Convocations*, will be considered at Convention in October. Two of the five current District Dean LOA's conclude on 10/31/24.

2024 Staffing (EXHIBIT S-6)

Diocesan Salary Ranges

POSITION (* includes SECA)	HC	SALARY RANGE (FT)		
		Min.	Midpoint	Max.
<i>Rector/Priest in Charge (Mem > 1200) *</i>	0.0	112,533	140,666	168,799
<i>Rector/Priest in Charge (Mem 601-1200) *</i>	3.0	98,697	123,371	148,045
<i>Rector/Priest in Charge (Mem 301-600) *</i>	2.0	84,861	106,076	127,291
<i>Rector/Priest in Charge (Mem 151-300) *</i>	7.0	71,486	89,358	107,229
<i>Rector/Priest in Charge (Mem < 150) *</i>	15.0	57,650	72,063	86,475
<i>Other Priests (Asst./Chaplain)*</i>	4.0		<i>n/a</i>	
Total Diocese	31.0			
<i>Bishop *</i>	1.0	145,000	170,000	195,000
<i>Transitions Officer*</i>	0.5	84,861	106,076	127,291
Chief Financial Officer, CFO	0.8	88,000	110,000	132,000
Operations & Benefits Manager	1.0	53,600	67,000	80,400
Parish Audit & Finance	1.0	49,600	62,000	74,400
Communications Director	1.0	49,600	62,000	74,400
Diocesan Accountant	1.0	49,600	62,000	74,400
Executive Assistant	1.0	39,000	52,000	65,000
TOTAL:	7.3			

Salary ranges are established for all Diocesan positions based on current market compensation data. * Clergy positions are based on Total Assessable Compensation (TAC) and include SECA allowance.

2025 Staffing (EXHIBIT S-7)

Diocesan Salary Ranges

POSITION (* includes SECA)	FTE	SALARY RANGE (FT)		
		Min.	Midpoint	Max.
Rector/Priest in Charge (Mem > 1200) *	0.0	114,839	143,549	172,258
Rector/Priest in Charge (Mem 401-1200) *	3.0	101,003	126,254	151,504
Rector/Priest in Charge (Mem 251-400) *	2.0	87,167	108,959	130,750
Rector/Priest in Charge (Mem 126-250) *	7.0	73,792	92,240	110,688
Rector/Priest in Charge (Mem < 125) *	15.0	59,956	74,945	89,934
Other Priests (Asst./Chaplain)*	3.0		90,000	
Total Diocese	30.0			
Bishop *	1.0	145,000	170,000	195,000
Director of Ministry*	1.0	87,167	108,959	130,750
Director of Formation*	0.5	87,167	108,959	130,750
Director of Finance & Administration	1.0	84,000	105,000	126,000
Operations & Benefits Manager	0.3	53,600	67,000	80,400
Parish Audit & Finance	0.4	53,600	67,000	80,400
Director of Community Connections & Public Relations	1.0	53,600	67,000	80,400
Executive Administrator to the Bishop	1.0	53,600	67,000	80,400
Diocesan Bookkeeper, Payroll & Benefits Administration	1.0	49,600	62,000	74,400
TOTAL:	7.2			

Rector/Priest Salary ranges are increased \$2,000-3,000 (plus SECA), using most recent CPG clergy compensation data. Lay staff roles are adjusted based on new roles, job descriptions and National survey data.* Clergy positions are based on Total Assessable Compensation (TAC) and include SECA allowance.

Reference

2024 Apportionment Formula

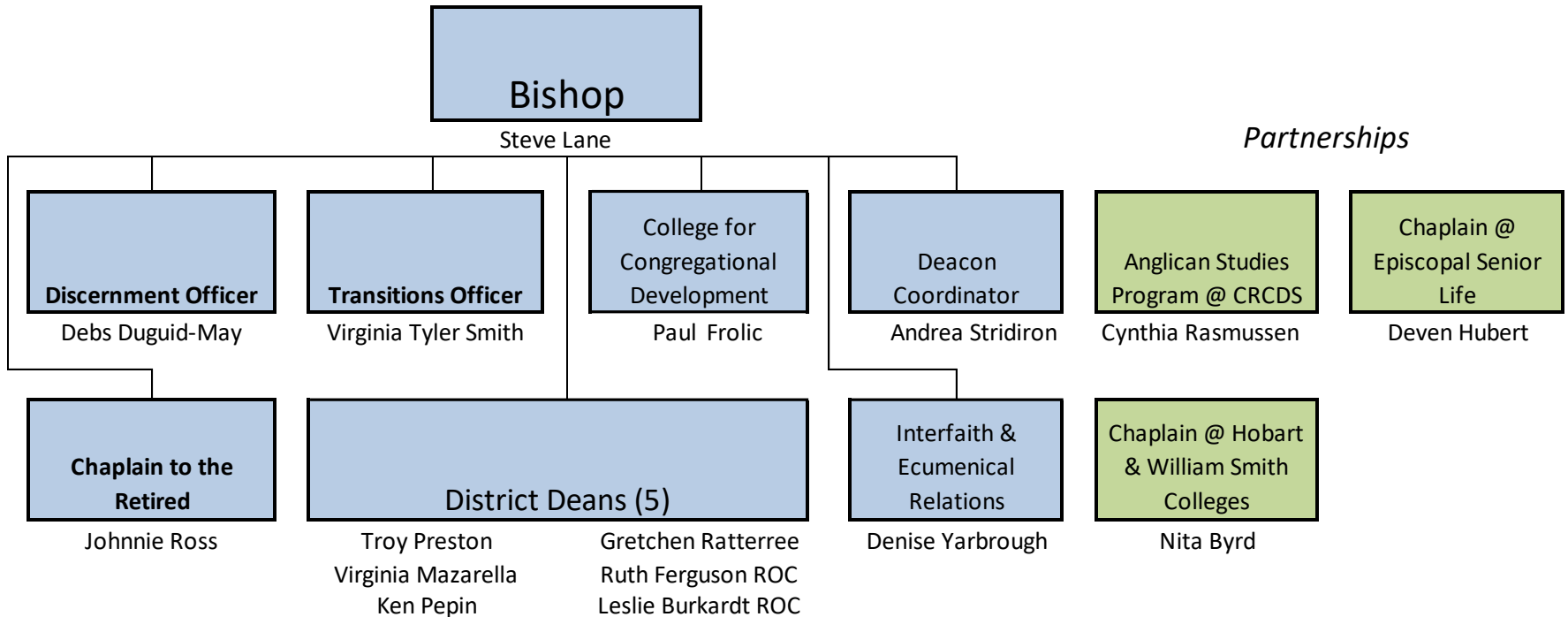
Based on Parish Normal Operating Income (NOI):

- **10% of the first \$180,000** of operating income
- And 15.5% of income > \$180,000
- Apply a **5%** “cap & floor”, to limit annual increases/decreases
- Apply a “cap on *Effective Rate*” (= *Formula Rate* + 3% pts.)

*Expanding the 10% rate range to \$180,000, moving the “cap & floor” back to 5%, and maintaining the “cap” on effective rate, results in **2024 Apportionment of: \$974,943**, down \$17,220 (2%) from 2023.*

10/1/2023 Staffing

Diocesan Clergy Leadership Roles



- There were 11 part-time clergy roles + 3 *Partnership* roles
- Total of **8.5-9.0 FTE's** (includes **6 Lay Staff** roles & excludes *Partnerships*)
- *Clergy leadership structure* was somewhat fragmented, and *District structure* was difficult to staff.