



THE EPISCOPAL CHURCH
THE GENERAL CONVENTION

January 29, 2018

The Most Rev. Michael B. Curry
Presiding Bishop
The Episcopal Church Center
815 Second Avenue
New York, NY 10017

Dear Bishop Curry,

The General Convention Office would be pleased to assist with the House of Bishops' research project you have described to me. In order to complete our part of that research, we would need the bishops to provide information that is not currently gathered in the annual parochial or diocesan reports, and to agree on particular definitions of that information so that we can provide accurate analysis.

The attached spreadsheet details the points in the House of Bishops' resolution, provides the information we now have, and leaves blank the information that would be needed, or that would be computed based on the additional information we receive.

In particular, bishops would need to provide the following information for each of their dioceses:

- Average diocesan budget over the past three years (for consistency with the data from the current parochial and diocesan reports, 2014 - 2016 should be used)
- Average market value of diocesan endowment over the past three years
- Average percentage over the last three years of diocesan endowment supporting the diocesan budget (this cannot be computed from the previous two figures, because dioceses will have different percentages of endowment "draw," and there may be other, local factors affecting this computation.)
- Last three years average amount of funding provided by the diocese to support provincial and companion relationships

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In addition, the bishops would need to agree to a definition of the following terms, to ensure consistency to the data they provide:

- *Diocesan budget: Is this a consolidated budget of all income and expenses of the dioceses, an operating budget (and if so, what items are to be included in the definition of an operating budget), or some other combination of income and expenses?*
- *Diocesan endowment: Does this include endowment funds that have restricted uses not available for general diocesan expenses (such as endowments for a bishop's discretionary funds); does this include the value of trusts that the diocese does not control, but of which the diocese is a beneficiary; etc.?*
- *Provincial and companion relationships: What relationships are to be included; does the amount of support include "pass through" amounts from parishes and individuals for such support; are corporate offerings to other groups that provide such support included (such as UTO donations, or ecumenical collaborative efforts); etc.?*

When these definitions are established by the bishops, it may be necessary for their financial and other staff to recalculate data they already have, if the diocesan definition of such terms as "budget" differs from the agreed-upon definition.

Once we have all this information from the bishops and their dioceses, we will be able to make the calculations and provide the analysis needed. In order to provide meaningful analysis, I suggest that the bishops agree that the information will be sent to the General Convention Office by a particular, mutually-agreeable date. You will also need to devote time at the House of Bishops' meeting to discuss and agree on the definitions needed.

The General Convention Office and I are happy to assist with this research project. If the bishops provide the necessary information by the particular date mutually agreed, we should be able to complete our analysis in a timely manner, subject to the demands on the office in preparing for the 79th General Convention.

Please let me know if you have any other questions.

Faithfully,



The Rev. Canon Michael Barlowe
Executive Officer