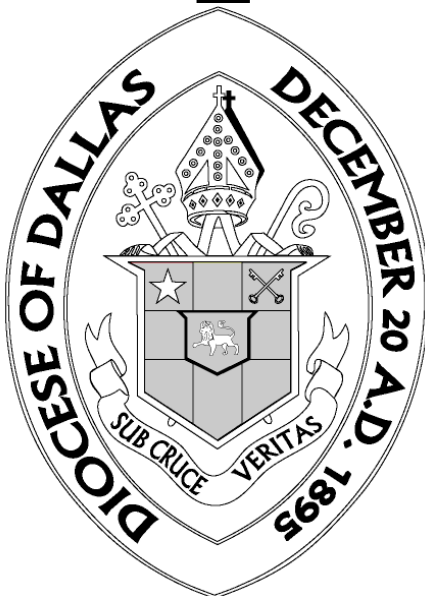


# *DIOCESE OF DALLAS*

*JOURNAL TO THE  
ONE HUNDRED  
TWENTY-FIFTH  
ANNUAL MEETING  
Saturday, November 7, 2020*

*and*

*REPORTS TO THE  
ONE HUNDRED  
TWENTY-SIXTH  
ANNUAL MEETING  
Saturday, November 6, 2021*





JOURNAL  
TO THE  
ONE HUNDRED  
TWENTY-FIFTH  
ANNUAL MEETING  
OF THE EPISCOPAL  
DIOCESE OF DALLAS



SATURDAY, NOVEMBER 7, 2020

JOURNAL TO THE ONE HUNDRED TWENTY-FIFTH  
ANNUAL MEETING  
OF THE EPISCOPAL DIOCESE OF DALLAS  
SATURDAY, NOVEMBER 7, 2020

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## DIOCESAN OFFICE DIRECTORY

### DIOCESAN OFFICE

Bishop	The Rt. Rev. GEORGE R. SUMNER
Assistant Bishop	The Rt. Rev. MICHAEL G. SMITH
Canon for Congregations	The Very Rev. ROBERT PRICE
Secretary of Convention	BOB BUCHANAN
Assistant Secretary	LAURA FAULKNER
Treasurer	GREG FOX
Assistant Treasurers	ALISON FOX
	JAMES A. SMITH
Chancellor	DAVID PARSONS
Vice Chancellor	ELLEN WILLIAMSON
Assistant Chancellors	CHRISTOPHER AYRES
	MICHAEL B. JOHNSON
	ELISABETH KINCAID
	TRACY POUNDERS
	SARAH TORAASON
	CHAD TRAMMELL
	GEORGE CARLTON
	ELLEN WILLIAMSON
	SUSAN MILLS
Church Attorney (Title IV)	The Venerable ROSEMARY TREI
Parliamentarian	Canon CARRIE BOREN HEADINGTON
Registrar and Missioner for Diocesan Services	The Rev. Canon JERRY MORRISS
Archdeacon	The Rev. Canon DAVID PETRASH
Canon for Evangelism	The Rev. Canon JORDAN L. HYLDEN
Canon for Rural Ministries	KIMBERLY DURNAN
Canon Pastor	VIRGINIA WILDER
Canon Theologian	AMY WOOTEN
Director of Communications	LAURA FAULKNER
Executive Assistant to the Bishop	TICOY YOUNG
Executive Assistant to the Canon for Congregations	KIM LANORE
Ministry Assistant	The Rev. Canon VICTOR LEE AUSTIN
Missioner for Finance and Budget	
Receptionist and Administrative Assistant to Missioner for Finance and Budget	
Theologian-in-Residence	

**THE CORPORATION OF THE EPISCOPAL DIOCESE OF DALLAS  
BOARD OF TRUSTEES**

Chair, Bishop  
President  
Vice-President  
Treasurer  
Members

The Rt. Rev. GEORGE R. SUMNER  
TIMOTHY A. MACK (term ending 2022)  
WILLIAM BEECHERL (term ending 2024)  
G. THOMAS GRAVES, III (term ending 2024)  
STUART BUSH (term ending 2020)  
GERALD DAHLANDER (term ending 2020)  
CATHLEEN DOLT (term ending 2023)  
ROBERT A. HULSEY (term ending 2023)

**STANDING COMMITTEE**

President  
Members

The Rev. ANDREW VAN KIRK (term ending 2020)  
LANA VALENTA (term ending 2020)  
The Rev. Canon VICTORIA R.T. HEARD (term ending 2021)  
TIMOTHY A. MACK (term ending 2021)  
The Rev. ROBERT CORLEY (term ending 2022)  
G. THOMAS GRAVES, III (term ending 2022)

**EXECUTIVE COUNCIL**

Bishop  
Standing Committee President  
Treasurer  
Chancellor  
Archdeacon

The Rt. Rev. GEORGE R. SUMNER  
The Rev. ANDREW VAN KIRK (term ending 2020)  
GREG FOX  
DAVID PARSONS  
The Venerable ROSEMARY TREI

**TERM ENDING 2020**

The Rev. CLAYTON ELDER, St. Philip's, Frisco  
The Rev. FABIAN VILLALOBOS, Christ Church, Dallas  
WILL BEECHERL, Incarnation, Dallas  
CRAIG FOWLER, St. Peter's, McKinney  
MISTY KEASLER, Epiphany, Richardson  
DAVID PINSON, St. Matthew's, Dallas

**TERM ENDING 2021**

The Rev. JENNIFER SMITH, Resurrection, Plano  
The Rev. LESLIE STEWART, Resurrection, Plano  
ARMANDO BARRIOS, Christ Church, Dallas  
PAT BOSTIAN, St. Paul's, Prosper  
MIKE MCGREW, Good Shepherd, Terrell  
ROSE OFOEGBU, Emmanuel Anglican, Dallas

**TERM ENDING 2022**

The Rev. ROY ABRAHAM THOMAS, St. Andrew's, McKinney  
The Rev. CATHERINE THOMPSON, Annunciation, Lewisville  
CORY FLOYD, St. James, Texarkana  
SHERYL HOLTON, St. Philip's, Frisco  
JOLAYNE LACOUR, St. David's, Denton  
LEE SPENCE, St. Dunstan's, Mineola

## **2020 CONVOCAATION CHAIRPERSONS**

Central  
Eastern  
Northeastern  
Northern  
Southern  
Western

FRED ELLIS, St. Thomas, Dallas  
ADELE ICHILIAN, St. Matthew's, Dallas  
The Rev. CRAIG REED, Holy Cross, Paris  
FORREST FAIRLEY, St. Andrew's, McKinney  
SUNNY LASITER, St. James', Kemp  
DEAN STEWART, Good Shepherd, Cedar Hill

## **2020 CONVENTION COMMITTEES**

### **Convention Arrangements Committee**

The Rt. Rev. GEORGE R. SUMNER, Bishop  
MARK and TERRY DEMLER, Co-Chairs  
The Very Rev. ROBERT PRICE, Worship Chair  
The Venerable ROSEMARY TREI, Archdeacon  
ADELE ICHILIAN, Exhibits  
ELLEN WILLIAMSON, Parliamentarian  
KIMBERLY DURNAN  
LAURA FAULKNER  
KIM LANORE  
SUSAN MILLS  
VIRGINIA WILDER  
AMY WOOTEN  
TICOY YOUNG

### **Constitution and Canons**

DAVID PARSONS, Chair

### **Credentials and Registration**

JOLAYNE LACOUR, Chair  
KIM LANORE, Staff Representative  
SUSAN MILLS, Staff Representative  
AMY WOOTEN, Staff Representative  
TICOY YOUNG, Staff Representative

### **Dispatch of Business and Resolutions**

The Very Rev. ROBERT PRICE

### **Resolutions Committee**

DAVID PARSONS, Chair

### **Nominating Committee**

The Rev. PERRY MULLINS, Chair  
The Rev. ETHEL CHANNON  
The Rev. CHRISTOPHER STEELE  
The Rev. KEITH TURBEVILLE  
Misty Keasler  
Bill McGannon  
David Pyke  
Lee Spence

### **Elections Committee**

ELLEN WILLIAMSON, Chair  
KIM LANORE  
SUSAN MILLS  
TICOY YOUNG

## PROCEEDINGS OF THE 125<sup>TH</sup> ANNUAL CONVENTION OF THE EPISCOPAL DIOCESE OF DALLAS

The Rt. Rev. George R. Sumner, Bishop of Dallas, served as Chair of the Convention and called the Convention to order.

Bishop Sumner welcomed all lay and clergy delegates and guests to the convention.

The Chair then called on David Parsons, Chancellor, to report on the number of ballots received and status of the quorum.

Mr. Parsons gave the following credentials report:

<u>Clerical Order</u>	<u>Lay Order</u>
186 Canonically Resident	59 Parishes and Missions in the Diocese
63 Required for a Quorum	20 Required for a Quorum
123 Registered to Vote	170 Lay Delegates representing 52 Parishes and Missions registered

Mr. Parsons declared a quorum present in both orders and concluded his report.

The Bishop again recognized Mr. David Parsons, who presented the special *Rules of Procedure for the Annual Convention* written for the online convention. These rules were adopted by the paper ballot sent to all delegates prior to Convention. The Convention will revert to the prior rules for the convention in 2021. Mr. Parsons concluded his report.

### RULES OF PROCEDURE FOR THE ANNUAL CONVENTION

#### Online Convention

1. Given the prevalence of COVID-19 in Texas, the potential dangers to health of an in-person convention, the fact that the previously published convention location is not able to accommodate us, and the inability of the Bishop to find a safe alternative venue for an in-person Convention, the Bishop, with the consent of the Standing Committee and with the advice of the Chancellor, has decided to hold the 2020 Annual Convention online via Zoom. These Special Rules of Procedure have been written to account for the exigencies of an online convention and will be presented for adoption by Convention when it meets. Upon adoption these rules will apply retroactively to all matters related to the online convention.

#### Presiding Officer

2. The Bishop or such other person as provided in the Constitution and Canons of the Diocese shall serve as presiding officer. The presiding officer may call to the chair any qualified person to relieve him temporarily. The presiding officer shall have full power and authority to take such action (consistent with the Constitution and Canons) as he deems necessary to expedite the orderly disposition of the business of the Convention.
3. After the Convention is called to order by the presiding officer, an opening prayer shall be offered by the presiding officer or someone designated by him.
4. The presiding officer shall have the authority to appoint a parliamentarian of his own choice to advise him on parliamentary questions arising during the Convention.
5. Any person addressing the chair or desiring recognition of the chair while the Convention is in session shall indicate their need to speak by selecting the appropriate option in Zoom and shall address the chair as "Right Reverend Sir" if the Bishop is in the chair. If some other person is in the chair, he shall be addressed as "Mister/Madam President."

#### Committees

6. In addition to the Nominating Committee provided for elsewhere in these Rules, the Ecclesiastical Authority, within a reasonable length of time before the convening of the Annual Convention, may appoint from among the officers and staff of the Diocese, the delegates of the Convention and such other confirmed persons in good standing as the Ecclesiastical Authority may designate, the following committees: Arrangements, Credentials,



Dispatch of Business, Constitution and Canons, Elections. Each committee shall consist of a chair and such other members as the Ecclesiastical Authority may determine. Each committee shall perform such duties as may be deemed necessary or advisable to facilitate the business of the Convention and any specific duties assigned to such committee by the presiding officer or under the Constitution and Canons or these Rules. Members of these committees shall continue in office until their respective successors are appointed.

#### **Order of Business**

7. The order of business to be presented to the Convention for adoption shall be established by the presiding officer in accordance with the Constitution and Canons.
8. Any item of business of the Convention may be set as a special order of business or taken up out of its regular order at any time by a two-thirds vote of the delegates. Subject to the foregoing, the presiding officer shall have the authority, within his discretion, to deviate from the order of business adopted, as the exigencies of the occasion may require.
9. After being organized and ready to proceed to business, the first order of business shall be the election of a Secretary and one or more Assistant Secretaries, if needed.
10. In order to expedite the conduct of business, no Resolutions of Substance (thus exempting Resolutions of Courtesy) shall be submitted to the Convention, except by the Committee on Dispatch of Business.

#### **Conduct of Business**

11. A delegate desiring recognition of the Chair shall indicate their need to speak by selecting the appropriate option in Zoom and give his/her name and the name of the church he/she represents.
12. A delegate making a report or debating shall indicate their need to speak by selecting the appropriate option in Zoom.
13. To expedite the business of the Convention, debates on any pending resolution or motion shall be limited to three minutes per speaker, and one person shall not speak more than once on the pending matter until all other persons who so desire have had an opportunity to be heard. No member shall speak more than two times to any one motion. The number of speakers for discussion shall be divided, as near as is practical, equally between the proponents and opponents of the pending subject.
14. A question having been decided shall not be reconsidered at the same Convention without the consent of two-thirds of the members present, nor without a motion for that purpose being made by one of the majority on the prior decision. No question shall be reconsidered more than once.
15. If required by the presiding officer, any motion shall not be considered as before the Convention unless reduced to writing.
16. In order to expedite the conduct of business, no proposed amendment to the Constitution or Canons shall be placed before the Convention.
17. When consideration of the proposed Diocesan Budget is before the Convention, each amendment thereto must (a) be submitted to the Treasurer in writing by the deadline published in the convention materials, (b) indicate the specific line item(s) being increased and/or decreased, and (c) the aggregate dollar amount of changes proposed must be offsetting.

#### **Reports**

18. All reports, which have been printed and distributed in advance to all members of the Convention, shall be presented by title only and not read.
19. The budget materials prepared for Convention shall include both descriptions of line items and rationale for changes in funding or deletions of line items from the budget of the previous year.

#### **Nominations**

20. The Ecclesiastical Authority shall appoint, not less than 60 days in advance of each Annual Convention, a Nominating Committee composed of four clergy and four lay persons resident in the Diocese, which shall report to the Convention nominations for all elective offices (other than those for which the bishop makes the nominations) in accordance with the following provisions:

(a) Except as to the Office of Secretary, Trustee of the University of the South, and President of the Disciplinary Board, there shall be nominated not less than two nominees for each office.

(b) There shall be obtained from each nominee presented his/her personal assurance of his/her willingness and availability to serve, if elected.

(c) The name of each nominee shall be accompanied by suitable brief biographical data, including a listing of parish, mission, and diocesan offices then and previously held.

(d) Suggestions as to persons for consideration shall be sought from parishes, missions, diocesan institutions, and individuals.

(e) No further nominations for any office shall be made. No seconding speeches or endorsements of any candidate shall be allowed. A nominee (or in his/her absence at the Convention, the Rector of the nominee's Parish) may withdraw his/her name from consideration at any time.

### **Voting and Elections**

21. When two or more equal positions are voted on simultaneously, a nominee must receive a majority of the total number of legal votes cast for such office. In the event a majority is received by more candidates than there are positions to be filled, those with the highest legal vote totals shall be elected.

22. In the election of persons wherein a concurring majority of both orders is required, in which only the number of persons required to fill the position or positions under consideration have been nominated, the Bishop, by unanimous consent of the Convention, may declare the candidates elected.

23. The Ecclesiastical Authority shall have the authority to appoint all Board Members, Trustees, and Committee Members, and fill other positions which are not required to be elected or otherwise selected by the Constitution or Canons of the Diocese of Dallas or any other lawful authority.

24. Voting will be conducted primarily by written ballot distributed in advance of the Annual Convention with a date for return of said ballot by mail, fax or email. No ballots received after this deadline shall be counted. Submission of a written ballot shall also constitute attendance at the meeting for quorum purposes. Any other voting required to be conducted at the meeting shall be conducted using the balloting feature of Zoom or equivalent option. The results of the elections will be reported to the Annual Convention by the Chair of the Elections Committee. The Elections Committee shall adopt procedures to maintain the confidentiality of all ballots and each member of the Elections Committee shall agree in writing to maintain such confidentiality.

### **Miscellaneous**

25. The presiding officer, or such person as he may designate, shall be in charge of the admission of all media personnel. No recording of the Annual Convention shall be permitted by any means without the prior approval of the presiding officer.

26. The proceedings of the Convention shall be recorded via Zoom and permanently filed. The Journal of the Convention shall be reviewed and approved by a committee consisting of the Secretary, the Chancellor and the Parliamentarian.

29. Any of these rules may be suspended by a two-thirds vote of the delegates. These rules may be amended by a two-thirds vote of the delegates, provided such amendments are not in violation of the Constitution or Canons of the Diocese.

30. The Constitutions and Canons Committee shall be authorized to correct article, canon, and section designations, numbering, grammar, punctuation and cross-references and to make such other technical, typographical and conforming changes that will not change the meaning or intent of an amendment or resolution as may be necessary to reflect the intent of the Convention in approving the amendment or resolution.

31. These rules of procedure shall apply only to the 2020 Annual Convention, and the prior approved rules shall be reinstated for the 2021 Annual Convention.

\* \* \*

The Chair recognized the Very Rev. Robert Price to report on the Proposed Agenda. Dean Price reported that the Proposed Agenda had already been adopted per the special Rules of Convention.

## **PROPOSED AGENDA**

Saturday, November 7, 2020

9:00 a.m. Morning Prayer  
9:45 a.m. Report of the Credentials Committee – Quorum Report  
Approval of Rules of Convention  
Report of the Committee on Dispatch of Business  
Report of the Nominating Committee – Election of Secretary  
Results of the First Ballot and Online Voting (if required)  
Bishop Sumner's Address  
Final Election Results  
Corporation Business  
2021 Budget  
Courtesy Resolutions  
Adjournment, Blessing and Dismissal

Dean Price concluded his report from the Committee on Dispatch of Business.

\* \* \*

With the adoption of the three reports (Credentials, Rules of Procedure, and Order of Business), the Chair announced that the convention was duly organized and ready for the transaction of business.

The Chair recognized the Very Rev. Robert Price, Chair of the Dispatch of Business Committee, to present the results of the paper ballot.

The paper ballot included the nomination and election of Mr. David Parsons as Chancellor of the Diocese and Mr. Greg Fox as Treasurer of the Diocese. The Bishop also appointed Mrs. Ellen Williamson as Parliamentarian.

## **REPORT OF THE NOMINATING COMMITTEE**

### **Secretary to Convention**

Mr. Bob Buchanan

### **Standing Committee**

#### Clergy

The Rev. Dr. Samira Izadi Page  
The Rev. Fabian Villalobos

#### Lay

Stevi McCoy  
J.C. Snead

### **Executive Council**

#### Clergy

The Rev. Mark Anderson  
The Rev. Richard Daly  
The Rev. Charles Keen  
The Rev. Paul Nesta

#### Lay

Hope Anderson  
Tim Boswell  
Jerry Fillebrown  
Martha Land  
Kelly Reddell

### **Trustee to the University of the South**

#### Lay

Dallas Gingles

## **2020 ELECTION RESULTS**

**Secretary to Convention**

Mr. Bob Buchanan

**Standing Committee**

Clergy

The Rev. Dr. Samira Izadi Page

Lay

Stevi McCoy

**Executive Council**

Clergy

The Rev. Mark Anderson

The Rev. Paul Nesta

Lay

Hope Anderson

Tim Boswell

Martha Lang

Kelly Reddell

**Trustee to the University of the South**

Lay

Dallas Gingles

In the election for Executive Council in the Clergy order, only the Rev. Mark Anderson received enough votes to be elected on the first ballot. Dean Price announced that the Rev. Richard Daly and the Rev. Charles Keen both withdrew, and the Rev. Paul Nesta was elected for the second clergy member by acclamation.

\* \* \*

The Chair recognized Mr. Bob Buchanan, Secretary of the Convention. Mr. Buchanan noted that the minutes of the 124<sup>th</sup> Annual Diocesan Convention held in 2019 had been previously approved by a committee consisting of Bob Buchanan, the previous year's Secretary to Convention; David Parsons, the Chancellor; and Ellen Williamson, the Parliamentarian. The Chair thanked the committee and then appointed the Secretary to Convention, the Chancellor, and the Parliamentarian serving as minutes approval committee for the 125<sup>th</sup> Annual Diocesan Convention held in 2020.

\* \* \*

The Chair then called upon the Very Rev. Robert Price, Canon for Congregations, to report on clergy changes within the Diocese.

Clergy Changes

Newly Ordained Clergy

Deacons

The Rev. Michael Logan Hurst

The Rev. Robert Trent Pettit

Priests

The Rev. R. Chase Skorburg

The Rev. Lorenzo Galuszka

The Rev. Ryan Jordan

Clergy Transfers into the Diocese

The Rev. John Alier – non-parochial

The Rev. Christopher Thomas – St. Thomas the Apostle, Dallas

The Rev. Jonathan Totty – Annunciation, Lewisville

The Rev. David Halt – St. James, Texarkana

The Rev. Kenneth Brannon – Saint Michael and All Angels, Dallas

Newly Licensed Clergy

The Rev. Janice Honea – St. Peter's, McKinney

The Rev. Ebenezer Ayodeji Fasusi – non-parochial

The Rev. Joseph Dewey – Incarnation, Dallas

The Rev. Teresa Terry – Ascension, Dallas  
The Rev. Paulette Magnuson – St. Andrew's, McKinney

Deaths:

The Rev. Thomas Keithly  
The Rev. George Luck  
The Rev. David Holland  
The Rev. Raymond Ball

Dean Price concluded his report, and Bishop Sumner offered a prayer.

\* \* \*

The Chair then reported on the six mission stations of the diocese: The Gathering, Dallas; Holy Faith, Dallas; San Marcos, Mt. Pleasant; St. Francis, Winnsboro; St. Justin Martyr, Canton; and Grace Community, Plano.

\* \* \*

The Chair, the Rt. Rev. Dr. George R. Sumner, Bishop of Dallas, then offered his address.

**Address to the 125<sup>th</sup> Annual Convention**  
**The Rt. Rev. George R. Sumner, Bishop, Diocese of Dallas**

Before I begin, I want to express my appreciation to the Church of the Holy Cross for their hospitality in the use of their interior Garden of Contemplation, next to St. Francis, an appropriate place to speak with you in this season about our common life.

*Muchas gracias por la hospitalidad de la Iglesia de Santa Cruz en Dallas para usar su jardín interior de la contemplación con el Santo Francisco, un lugar adecuado para conversar contigo sobre nuestra vida común.*

In the name of God, the Father, Son, and Holy Spirit, Amen.

Forty years ago, as a new missionary of the Episcopal church placed in central Tanzania, in the late summer, I would occasionally see young men, their bodies painted white, jogging and singing alongside of the road. They were being initiated into manhood. And I should add, there were also traditions for young women who took on their responsibilities of adulthood. What did all that involve? First of all, they were separated – distanced, you might say – in the bush, and then they were tested. They had trials like those long runs under the African sun, and they were taught by their elders. What did it mean to be an adult member of the tribe? What kind of person ought you to be to meet that responsibility? As children, they had already been part of the tribe, but now they were to take that identity on themselves consciously. I should add that most of these young people were Christians and also at the same time underwent confirmation.

These young people were going through what the anthropologists call a Rite of Passage, and that ritual space in which it took place in between was named the liminal, which literally means the doorway. To get from here to there, we humans have to pass through, and there are steps to go across: distance, trial, teaching, claiming your true identity.

Actually, something similar happened in the early centuries of the Church. New members, prospective members, catechumens were separated. Remember, they had to leave before the Eucharist began – leave at the peace. There were trials like fasting and exorcism. They had to serve others. They were taught. This is, in fact, the origin of the season of Lent for us. Eventually they stood in church and recited back the Creed, leading to the glorious night at Easter Vigil when they were given and would receive their true identity as children of their Heavenly Father in Jesus and inheritors of the Kingdom of Heaven.

This morning, my dear friends, the Diocese of Dallas, I address you in this strange way because it is a strange

time. My message to you is this: what we as Christians are going through at this time is a kind of initiation. All the elements are here: distance, to be sure; testing and trial; for many, suffering; teaching in old formats and new by our faithful clergy in this Diocese. And all of this to the end that we claim anew what we already have – our identity as disciples of the crucified and risen Jesus Christ. That is what is really happening.

*Este es mi mensaje. Ahora nosotros como la gente de Dios no sentimos estar en un tipo de la iniciación. Aye todos los partes aquí: distancia por se puesto, pruebas y tentaciones la ensenyanda de nuestros pastores fieles para reclamar su identidad.*

But you ask: didn't that initiation already happen for me in baptism. Of course it did, but the Christian life is reclaiming it, remembering it, seeing more of it, going deeper into it. We are already disciples. He was already a disciple – Peter – when he heard the words, “Do you love me? Feed my sheep. Come and follow.” And so it is for us too – summon deeper and summon forward.

But wait a minute, Bishop, the time of COVID isn't some program of church formation. Isn't it really a random biological event, and as a result, a source of social and political strife – indeed, a health disaster? Isn't it a stressor for my family, and finally, a great question, mark over the future of all the churches? It is all these things, but it is also in the hand of God a summons to discipleship and as such a gift of grace. There is a theological principle here: God rules over everything, and He gives His world freedom, and He retains the power to order it, and He has the power to use even a pandemic for His loving purpose. Remember those words of Joseph to his brothers toward the end of the book of Genesis, “You intended me harm, but God intended it for good to accomplish what is now being done, the saving of many lives.”

*Dios reina sobre todos y da a nos libertad y puede usar todos cosas incluyendo una pandemia para su propósito misericordios.*

I want to offer this morning three things that Christian formation, which in the time of COVID, has taught us. Surely there are many more, but these three come to my mind. First, let me be clear – I don't want to have to be saying what I am saying this morning. I wish there were no COVID. I wish it would go away. It has upended all kinds of hopes and plans which we as a diocese had. Part of my objection is that COVID has been imposed on me. I have had to undergo it, and therefore it offends my sense of choice, will, and volition. I believe we all share some of that for it is a central part of our culture: choice and offense at what treads upon us from outside.

But compare this to the wisdom of the ancients. *Pathei-mathos, pathei-mathos*: it means in Greek “knowledge comes through suffering.” We learn through what we undergo. That is what the great ancient Greek writer of tragedy Sophocles wrote about the hero Oedipus searching relentlessly for the truth that ended up spelling his own doom. Knowledge comes through suffering undergone. The ancient pagans believed that once you had this truth, your options as a human being were three: lose yourself in pleasure, clench your jaw with grim duty, or escape into a high vision divorced from the reality of the earth below. And that is why poor Oedipus put his own eyes out.

Those three same options are available in the secular post-modern pandemic world today. “Knowledge through suffering.” The adage rings in our ears this season, but it means something very different for us as Christians. It takes on a different meaning. Let me drill down on that point for a moment. *Pathos* in Greek means something undergone, something you have passively submitted to. But it is not all passive, for we know how to undergo it; we can learn from it; and we can be a witness in the midst of it, and that matters. The root gives us the word passion, something we undergo, in this case suffering. Remember Jesus in His death – we refer to it as the Passion of our Lord, but it also gives us the word patience, the quality which a Christian can have as he or she endures.

You can see the important connection between *pathos*, passion, and patience. At the heart of our faith is the passion of Jesus, as I say. He submits himself even to death. It is at once passive and yet the greatest act of obedience, love and self-giving that is imaginable. That undergoing bears for us all our sins and sets us free. His passion makes possible our patience, our deliverance accomplished, the times all in the hand of King Jesus. You and I can follow the road then, though it be hard, which he has graciously opened up.

As an aside, you and I can find something similar in the old English word “suffering.” It also had the meaning of submitting to something you undergo, as in the words, “suffer the little children to come unto me,” although it often refers as well to pain. In short, we are being summoned in the most counter-cultural of ways to understand suffering and patience, which are now upon us in a deliberately Christian way.

Second of all, and from the beginning, we realized that we are a body. By this I mean, we are deeply mentally but physically interconnected. The virus assumes it since it wants to get from one body to the next. Neither individuality nor particular experience means anything to it. And the pandemic has ripped through every level and corner of society. To be sure, as it has done so, it has also revealed divisions and distinctions, for example, in access to healthcare. But in the midst of it all, we have seen how we need each other. We need most immediately the frontline worker, the nurse, the postal worker, and so on. We are quite literally in this together and in need of one another. Society made up not just of individuals, but itself a body, and what epidemiology and secular social reality show us, we realize to be all that much more true for us as Christians. It is taken up to a higher level. We are the body of Christ, the identity given to us in baptism and renewed by trial so that we can see this as our own nature, which we share and we can own.

*Nosotros como seres un mano somos interconectados somos un cuerpo literalmente las demete en el viros pero con los trabajadores necesarios y en un nivelmas altos somos el cuerpo de Cristo es realidad porque el simbolo indica.*

Inertia is a social as well as a physical law. We grow accustomed, no less in the church as in the rest of society, to how things are. Our context real and less real the more distant context becomes from us. What if in the rite of passage called Pandemic, we were dislocated from the normal enough to see that we are in fact, in reality, a body in a more radical way. We are being summoned to see that we as church are a body: Episcopal churches with Roman Catholic and Watermark and Baptist and Pentecostal churches in South Dallas – all one. Jesus gives us no quarter. We are to be one as He and His Father are one.

What if in the midst of racial tension, disturbing realization of inequality, and moments of chaos, both left and right – what if the simple, profound gospel fact that we are already one in Christ, not in a general way, but really, bodily, as Baptist and Pentecostal, churches in South Dallas, and the Episcopal church, and in the city and town where you are across every racial, ethnic, denominational line, across habits of worship and across history. What if we started not with some political claim, but with the fact, made so by the word of Jesus, that we are one, already a body, so that we are compelled to work out its implications. And from the fact of the churches, a body, we could be witnesses of reconciliation in a society that desperately needs that witness.

As Christians, we work to alleviate hunger in our own townships, a good example being the Unite Project, which Deacon Smith and Carrie are working on, but there are many projects in other towns and cities because we are our brother or sister's keeper, being one body with them. The bread line is our distress and our problem. And finally, this being the 7th of November in the painfully divided year of 2020, we as Episcopalians are one body across our fractured political landscape. These are not options. These are not theories. These are implications of the solidarity that the initiation of pandemic thrusts upon us as by the hand of God.

The trial has been something imposed on us, but the baptismal passage is toward discipleship, toward your claiming the identity already yours, yours in baptism, yours that you share together with other sons and daughters of your Heavenly Father in His son, Jesus Christ. And that summons us onto a road together with him. COVID is nothing we asked for, but it summons us more deeply to claim who we have been: the body whose head is Christ, the company of followers of Jesus.

*Este tiempo de pueba estuvo en puesto para llamar nos como su cuerpo de lo quo la cabeza es Cristo compañeros juntos en la caminos sigiendos nuestro señor.*

And on the road, we need to make our way, find the roadsides with a little bread for the journey, discovering how to survive and how to invite others in this strange time. COVID has been a straight and difficult time but also a time of ingenuity in our churches. Paul, in First Corinthians says “when we are tried, we are also shown

the means of escape so that we might endure.” Constraint by the Holy Spirit can also provoke creativity. I have over these months seen such ways and means in our congregations: a network of Bible study and check in, a backyard church school, a cottage industry of masks, and a zoom Alpha, and on it goes. We enter a particularly demanding phase of the trial, our reserve of adaptation and creativity will be called upon anew.

At recent Executive Council and Standing Committee meetings, I posed the following question: “What if this is halftime, and we are now looking ahead to the second half until the vaccine.” Now the good news here is that this upcoming demanding period will come to an end, but that moment is not quite yet. One of our clergy drew the implication that I, then, was the coach, a kind of ecclesial Bill Belichick as it were, and it would matter whether in the second half we were receiving our kicking off, whether we were on offense or defense. And if it were offense, coach, what is the strategy? It is a hard question for which I did not have an immediate or obvious answer.

Though a body, our congregations have different callings and charisms and contexts and challenges. We are talking about something deeper than a diocesan program, however well-intentioned, but pose this question to yourself this morning and imagine it being posed to you all as a congregation with this trial and separation and testing and teaching, as you put your ear to God's word. “What does the renewed baptismal summons sound like to you? What is radical discipleship as you rise up in the power of the Holy Spirit? What is that for you and your congregation?” If I turn away from my moments of discouragement and fatigue and turn toward radical discipleship together in the body and following after our Lord's footsteps, what is the shape of that, as I listen to His voice?

If all this were not only some sad and random interlude that I would escape, but if this is God who was working good out of evil in our society, in us, in us together, what shape does that have for us and for you as his radical disciple? In the spirit of another Saint in the time of plague, Francis, how does this make us instruments of peace, and what will that look like for you, singular and collective? I am told that after the flu pandemic of 1918, most Americans would not even mention it. It was simply too painful to remember. And yet, on the other hand, I remember from church history, after 1918, the pandemic led to movements of renewal in the Holy Spirit throughout the worldwide church. What if we allowed ourselves to be turned toward that second outcome, renewal in the broadest sense, individually and as a body, what would that look like? I suspect that each of us know the answer as the still small voice speaks it into our ear.

*Aynque nosotros el legiamos este tiempo de la plaga y tal ves esperamos olvidarlo el es señor nos llama para dar un repuesta a su voz y para seuir como decibolos mas debilarado con un intendimiento que a no so puesto ahora y aqui. Como renovimiento del el spiruto santo va a paracer entrenu.*

I feel like the errant preacher who late in the sermon realizes he'd better get around to the text. This year is the 125th anniversary of the founding of the diocese, and I liked that wonderful cover art the brochure has highlighting our founding Bishop Alexander Garrett. He was no stranger to disease in northeast Texas, catching typhoid and malaria as he traversed his area. I want to focus on the fact that he ministered on a new frontier. He was a traditional Anglo-Catholic, which implies the corporate nature of the church, as well as the fact that he was a minority within it. But there was nothing given about how he was to fulfill his ministry. Rather, he was a creative *impresario* for the gospel in our area. He had to find ways and means to be heard: a pump organ in the field, a lecture about astronomy in the pub. He faced into an uncertain second half of the time and place given from the hand of Jesus to him in which he was to be a radical disciple. A century and a quarter later, our situation is utterly different, not so different at all.

Thank God for him and for this often-confounding situation in which we in our perplexity have to invoke the Holy Spirit. Thanks for the good news that Christ can summon good out of ill and is summoning us through this trial to be here and now His servants to this end. Thank God for one another, the body, which we too often take for granted. Thanks be to God for your identity – baptismal in Christ – in which you and I are given the promise of resurrection with Him and are now summoned as *compañeros* of the Crucified One, by which we can hear His voice telling us what form our walk must take in the second half of this time, and then as we emerge into a landscape, which will be changed and daunting and full of opportunity, with the hand of Christ



over us, to whom we owe all praise here and now and in that coming day and in the years to come and unto eternity. Amen.

\* \* \*

The Chair announced that the 125<sup>th</sup> Anniversary Celebration that had been scheduled for 2020 would be held in 2021.

The Chair then stated that the Racial Reconciliation Reading Group, led by the Rev. Matthew Burdette, had composed a resolution that that he would bring before Executive Council since no resolutions were allowed during the curtailed online Convention. The theological section from the middle of the resolution reads:

“Whereas the Holy Scripture reveals that every human being is created in the image of God and is thus endowed with an essential and inalienable dignity, the divine demand for justice given to the prophets is particularly concerned with those who suffer at the hands of unjust legal systems administered by the powerful, and Jesus Christ through the atoning sacrifice of the cross, an inauguration of humanities’ new creation in the resurrection, has broken down the barriers of hostility between all human beings, especially those based on race. Whereas through our baptism we take upon ourselves the sacred vocation of seeking and serving Christ in all persons, this includes honoring the witness of those who suffer, listening in humility to their testimony of injustice, and striving to address their needs.”

The Chair announced that the offering for the 2020 Convention would be collected via text or check and go to the Greater Dallas Coalition to serve those poorest of the poor in South Dallas with food, toys, turkeys for Thanksgiving, etc.

\* \* \*

## **BISHOP’S NOMINATIONS TO INSTITUTIONS, AGENCIES/BOARDS/COMMITTEES, COMMISSIONS**

The Chair called on Bob Buchanan to report on nominations and appointments by the Bishop.

Mr. Buchanan made a motion to recess as the Diocesan Annual Meeting and convene as the Annual Meeting of the Corporation of the Episcopal Diocese of Dallas. There was a second, and the motion passed with a vote via Zoom.

Mr. Buchanan directed delegates to page 8 of the Convention Booklet. The election for those nominated was part of the paper ballot distributed prior to Convention.

### CORPORATION OF THE DIOCESE

#### Nominations to a five-year term ending 2025

Tim Boswell  
Pat Bostian

The Annual Meeting of the Corporation of the Diocese of Dallas was adjourned, and the body reconvened as the Convention.

Mr. Buchanan moved acceptance of the following nominations to agencies, institutions, committees, and commissions. The motion was seconded, a vote was taken via Zoom, and the nominees were elected

### AUDIT COMMITTEE

#### Nominations to a one-year term ending 2021

William Peeler  
Wendy Skorburg

Mary Sonom

COMMISSION ON MINISTRY

Nominations to a three-year term ending 2023

The Rev. Mark Hall	Joan Fabion
The Rev. Kathy Heitmann	Wendy Skorburg
The Rev. Craig Reed	Rebecca Wellborn

COMMISSION ON EPISCOPAL SCHOOLS

Nominations to a three-year term ending 2023

The Rev. Michael Hurst  
The Rev. Clayton Elder

The Chair then thanked those persons who held office and concluded their terms in 2020.

**Standing Committee**

The Rev. Andrew Van Kirk, President  
Lana Valenta

**Executive Council**

The Rev. Clayton Elder	Craig Fowler
The Rev. Craig Reed	Misty Keasler
The Rev. Fabian Villalobos	Sunny Lasiter
Will Beecherl	David Pinson

**Commission on Ministry**

The Rev. Phil Snyder	Mary Ruth McKinney
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**Corporation of the Diocese**

Stuart Bush	Gerry Dahlander
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\* \* \*

**REPORT FROM THE FINANCE COMMITTEE**

The Chair called upon the Treasurer, Greg Fox, to make a presentation on the 2021 budget.

Mr. Fox stated that the budget is unchanged from what was printed in the booklet and distributed for vote via the paper ballot.

Mr. Fox highlighted a few points from the budget: a 1% assessment reduction, an assessment holiday for January 2021, giving the full asking amount to The Episcopal Church, and several budget adjustments for COVID-19.

**2021 PROPOSED BUDGET**

**RECEIPTS:**

Assessment Revenue	3,718,032.00
Endowment for the Episcopate	95,000.00
Episcopal Health Foundation of Dallas Grant	50,000.00
Assessment Holiday April 2020/January 2021	(309,836.00)

Allowance for Uncollected Assessments	(74,292.00)
Other Revenue	11,400.00
Interest Income	2,500.00
<b>TOTAL RECEIPTS:</b>	<b>\$3,492,804.00</b>
<b>DIOCESAN EXPENSES:</b>	
Congregational Support and Development	550,500.00
Church Plants	190,500.00
Clergy Development & Support	314,250.00
Theological Development & Special Ministry	146,800.00
Evangelism	67,850.00
Youth Ministry	4,000.00
College Ministries	3,000.00
Diocesan Institutions	78,000.00
Episcopal Church Ministries	639,905.00
Ecumenical & Diocesan Commitments	76,000.00
Office of the Episcopate	415,699.00
Diocesan Staff	762,800.00
Diocesan House Operating Expenses	243,500.00
<b>TOTAL DISBURSEMENTS:</b>	<b>\$3,492,804.00</b>

The Chair announced that the 2020 Budget had been adopted by the paper ballot and thanked Greg and Alison Fox for their hard work as well as the work of the Finance Committee.

\* \* \*

## COURTESY RESOLUTIONS

The Chair recognized the Secretary to Convention, Mr. Bob Buchanan, who offered the following Courtesy Resolutions.

**BE IT RESOLVED**, this One-Hundred Twenty Fifth Annual Convention of the Diocese of Dallas, on the 7<sup>th</sup> of November in the year of our Lord 2020, does hereby grant and give thanks to God for the Christian witness and dedication of clergy members who have died since the last meeting:

- The Rev. Thomas Keithly                      July 21, 2020
- The Rev. Canon George Luck                July 23, 2020
- The Rev. David Holland                      August 9, 2020
- The Rev. Raymond Ball                      October 18, 2020

and commend their souls to the grace and mercy of God Almighty and through Jesus Christ, our risen Lord, and be further resolved that this convention sends greetings and assurance of our gratitude and prayers to their several survivors.

**BE IT RESOLVED**, this One-Hundred Twenty Fifth Annual Convention of the Diocese of Dallas, does hereby express its gratitude to the Canon Carrie Headington, Archdeacon Rosemary Trei, and Deacon Jennifer Smith for providing the clergy of the diocese with an opportunity to learn about the cost of COVID, and for Unite Ministries' testimony to the work of the church amongst the poorest citizens of our city.

**BE IT RESOLVED**, this One-Hundred Twenty Fifth Annual Convention of the Diocese of Dallas, does hereby express its gratitude for the teaching of Bishop Lloyd Allen of the Diocese of Honduras. His passion for the gospel and tireless service to the people of Honduras are an inspiration to the Diocese of Dallas.

The Chair thanked Mr. Buchanan for the Courtesy Resolutions as well as his service as Secretary to Convention. The Chair also thanked Mark and Terry Demler and the Special Convention Arrangements

Committee for their hard work to prepare for Convention as well as the Diocesan Staff for their dedication, flexibility, and planning which made the Convention possible. The Chair thanked Dean Price and St. Matthew's Cathedral for their hospitality.

The Chair announced that the date of convention for 2021 will be November 6, 2021, at a location to be determined.

Finally, the Chair adjourned the convention with a prayer and blessing.

\* \* \*

## 2020 TELLERS' REPORTS

### Tabulation of Votes for Standing Committee — Clergy (*elect one*)

BALLOT #1	Clergy	Lay	
Votes Cast	122	168	
<u>Necessary to Elect</u>	<u>62</u>	<u>85</u>	
The Rev. Dr. Samira Izadi Page	63	100	ELECTED
The Rev. Fabian Villalobos	59	68	

### Tabulation of Votes for Standing Committee — Lay (*elect one*)

BALLOT #1	Clergy	Lay	
Votes Cast	116	167	
<u>Necessary to Elect</u>	<u>59</u>	<u>84</u>	
Stevi McCoy	75	109	ELECTED
J.C. Snead	41	58	

### Tabulation of Votes for Executive Council — Clergy (*elect two*)

BALLOT #1	Clergy	Lay	
Votes Cast	238	332	
<u>Necessary to Elect</u>	<u>60</u>	<u>84</u>	
The Rev. Mark Anderson	84	108	ELECTED
The Rev. Richard Daly	41	74	withdrew
The Rev. Charles Keen	52	72	withdrew
The Rev. Paul Nesta	61	78	ELECTED

### Tabulation of Votes for Executive Council— Lay (*elect four*)

BALLOT #1	Clergy	Lay	
Votes Cast	122	165	
<u>Necessary to Elect</u>	<u>62</u>	<u>83</u>	
Hope Anderson	97	143	ELECTED
Tim Boswell	92	130	ELECTED
Jerry Fillebrown	70	116	
Martha Lang	104	147	ELECTED
Kelly Reddell	77	118	ELECTED

REPORTS  
TO THE  
ONE HUNDRED TWENTY-SIXTH  
ANNUAL MEETING  
OF THE EPISCOPAL  
DIOCESE OF DALLAS



SATURDAY, NOVEMBER 6, 2021

REPORTS TO THE 126<sup>TH</sup> ANNUAL MEETING  
OF THE EPISCOPAL DIOCESE OF DALLAS  
SATURDAY, NOVEMBER 6, 2021

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# CLERGY LIST

September 1, 2020 to August 31, 2021

The Rev. Richard R. Daly		Vicar/Vice Rector, St. James, Texarkana	1/23/1996
The Rev. Craig A. Reed		Rector, Holy Cross, Paris	1/13/1999
The Rev. Edward R. Monk		Rector, St. John's, Corsicana	5/21/2003
The Rev. David S. Houk		Rector, St. John's, Dallas	10/15/2003
The Rev. Robert H. Johnston, III		Associate, St. Michael & All Angels, Dallas	11/15/2003
The Rev. Philip L. Snyder	(Deacon)	Deacon, St. James, Dallas	6/5/2004
The Rev. Gregory D. Pickens		Associate, St. Michael & All Angels, Dallas	5/14/2005
The Rev. Oliver M. Butler		Assisting, St. John's, Dallas	6/4/2005
The Rev. Terry R. Reisner		Vicar, St. Paul, Waxahachie	6/4/2005
The Rev. Robert M. Corley		Rector, St. Mark's, Irving	6/24/2006
The Rev. Daniel O. Ofoegbu		Vicar, Emmanuel Anglican, Garland	8/19/2006
The Rev. Donald R. Perschall		Rector, St. Luke's, Denison	10/1/2006
The Rev. Victoria R.T. Heard		Rector, Redeemer, Irving	10/2/2006
The Rev. Dorothy R. Budd	(Deacon)	Deacon, Incarnation, Dallas	12/2/2006
The Rev. Canon Michael R. Gilton		Rector, St. Philip's, Frisco	6/23/2007
The Rev. Timothy B. Cherry		Rector, Apostles, Coppell	8/1/2007
The Rev. Maria F. Barrios	(Deacon)	Deacon, St. Barnabas, Garland	11/10/2007
The Rev. Elizabeth S. Breyfogle	(Deacon)	Deacon, St. Peter's, McKinney	11/10/2007
The Rev. Noe Mendez		Vicar, Santa Natividad, Plano	11/10/2007
The Rev. Mark R. Wright		Rector, St. Nicholas, Flower Mound	1/9/2008
The Rev. Marcia J. Pounders		Vicar, St. John the Apostle, Pottsboro	1/26/2008
The Rev. Marc A. Dobson		Rector, Good Shepherd, Cedar Hill	9/8/2008
The Rev. Harold C. Lowe		Priest-in-Charge, Holy Family, McKinney	10/2/2008
The Rt Rev. Anthony J. Burton		Rector, Incarnation, Dallas	10/10/2008
The Rev. S. Thomas Kincaid		Vicar/Vice Rector, Incarnation, Dallas	6/6/2009
The Rev. Mary T. Lessman		Associate, St. Michael & All Angels, Dallas	6/6/2009
The Rev. A. Elizabeth Randall		Rector, Epiphany, Richardson	6/20/2009
The Rev. Andrew D. Van Kirk		Rector, St. Andrew's, McKinney	5/2/2010
The Rev. Aquilino Lara		Vicar, San Francisco de Asis, Dallas	6/26/2010
The Rev. David D. Miller		Rector, St. Anne, DeSoto	6/26/2010
The Rev. Dr. Samira Page		Vicar, Holy Nativity, Plano & Vicar, Grace Community	6/26/2010
The Rev. J. Wesley Evans		Rector, St. Stephen's, Sherman	1/25/2011
The Rev. Michael Hurst		Rector, St. James, Dallas	4/7/2011
The Rev. Juana Lara	(Deacon)	Deacon, San Francisco de Asis, Dallas	6/11/2011
The Rev. Ronald R. Studenny		Vicar, St. Justin Martyr, Canton	6/11/2011
The Rev. Katherine A. Heitmann		Associate, St. Peter's, McKinney	7/19/2011
The Rev. J. Oliver Lee		Associate, Incarnation, Dallas	10/25/2011
The Rev. Michael S. Mills		Rector, Good Shepherd, Dallas	11/20/2011
The Rev. Fabian Villalobos		Rector, Christ, Dallas	4/3/2012
The Rev. Catherine M. Thompson		Rector, Annunciation, Lewisville	3/27/2014
The Rev. Keith Turbeville		Rector, Holy Trinity-by-the-Lake, Heath	5/1/2014
The Rev. Matthew M. Frick		Vicar, St. Matthias, Athens	6/12/2014
The Rev. Mark R. Hall	(Deacon)	Deacon, St. Matthew's Cathedral & The Gathering, Dallas	6/14/2014
The Rev. Perry E. Mullins		Rector, St. Peter's, McKinney	6/14/2014
The Rev. Rebecca G. Tankersley		Associate, Transfiguration, Dallas	6/14/2014
The Rev. Christopher A. Steele		Priest-in-Charge, St. Christopher's, Dallas	7/16/2014
The Rev. R. Casey Shobe		Rector, Transfiguration, Dallas	10/27/2014
The Rev. Thomas Hotchkiss		Vicar/Vice Rector, Good Shepherd, Dallas	10/28/2014
The Rev. Paul Klitzke		Rector, Ascension, Dallas	5/4/2015
The Right Rev. George R. Sumner		Seventh Bishop of Dallas	5/29/2015
The Rev. Adriana J. Elliott	(Deacon)	Deacon, St. Mary's, Irving	6/4/2016
The Rev. Debra S. Vela	(Deacon)	Deacon, Christ Church, Dallas	6/4/2016
The Rev. Dr. Christopher D. Girata		Rector, St. Michael & All Angels, Dallas	8/1/2016
The Rev. Canon Jordan L. Hylden		Canon Theologian	8/15/2016
The Rev. Thomas Smith		Vicar, St. Paul's, Prosper	9/13/2016
The Rev. John D. Sundara		Associate, Incarnation, Dallas	1/6/2017
The Rev. David M. Faulkner		Rector, Good Shepherd, Terrell	1/24/2017
The Rev. Clayton L. Elder		Vicar/Vice Rector, St. Philip's, Frisco	6/15/2017
The Rev. Emily R. Hylden		Rector, St. Augustine's, Dallas	8/17/2017
The Rev. Joel T. Hatfield		Priest-in-Charge, Good Samaritan, Dallas	6/2/2018
The Rev. Dr. Nicholas J. Funk		Rector, St. Paul's, Greenville	7/16/2018



# REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING

## Saturday, November 6, 2021

The Rev. Paul A. Nesta		Rector, St. David of Wales, Denton	8/15/2018
The Rev. Mark S. Anderson		Rector, St. Luke's, Dallas	9/27/2018
The Rev. James Deng Alaak Pager		Vicar, St. Philip's Sudanese, Dallas	10/11/2018
The Rev. R. Matthew Crownover		Assisting & Chaplain, Good Shepherd, Dallas	10/27/2018
The Rev. Jonathan R. Jordan		Associate, Incarnation North, Dallas	2/2/2019
The Very Rev. Robert Price		Dean, St. Matthew's Cathedral & Canon for Congregations	4/10/2019
The Rev. Lorenzo Galuska		Rector, St. Barnabas, Denton	5/25/2019
The Rev. R. Chase Skorburg		Curate, Incarnation, Dallas	5/25/2019
The Rev. Roy A. Thomas		Vicar, St. Andrew's, Farmers Branch	10/17/2019
The Rev. Christopher B. Thomas		Rector, St. Thomas the Apostle, Dallas	2/7/2020
The Rev. R. Trent Pettit		Priest-in-Charge, St. Mark's, Mt Pleasant & St. Philip's, Sulphur Springs	5/22/2020
The Rev. Kenneth Brannon		Vice Rector, St. Michael & All Angels, Dallas	7/1/2020
The Rev. Ryan C. Jordan		Curate, St. David of Wales, Denton	7/28/2020
The Rev. David J.A. Halt		Rector, St. James, Texarkana	10/9/2020
The Rev. Miguel A. Carmona-Romero	(Transitional Deacon)	Deacon, St. Barnabas, Garland	3/13/2021
The Rev. Audrey Sutton	(Transitional Deacon)	Deacon, St. Philip's, Frisco	3/21/2021
The Rev. Mary Kate Gerber	(Deacon)	Deacon, Holy Trinity, Garland	4/10/2021
The Rev. Janice Honea	(Deacon)	Deacon, St. Peter's, McKinney	8/3/2021

### RETIRED, NON-PAROCHIAL, OR OUT-OF-DIOCESE

The Rev. G.K. Gordon Miltenberger	(Retired)	Greenville, TX	Assisting, St. Paul's, Greenville	6/20/1953
The Rev. Arthur L. Sargent	(Retired)	San Marcos, TX		6/20/1961
The Rev. John W. Darden	(Retired)	Prescott Valley, AZ		9/21/1963
The Rev. Raleigh E. Denison, Jr.	(Retired)	Georgetown, TX		2/15/1969
The Rev. William J.A. Power	(Retired)	Dallas, TX		10/8/1972
The Rev. J. Michael Woods	(Retired)	Mt Vernon, TX		6/16/1975
The Rev. Jerry E. Hill	(Retired)	Waxahachie, TX	Assisting, St. Paul, Waxahachie	8/1/1975
The Rev. Victor E. Hunter, Jr.	(Retired)	Mesquite, TX		8/28/1975
The Rev. H. Ralph McCune	(Retired)	Dallas, TX		8/26/1979
The Rev. H. Edward Sholty	(Retired)	Dallas, TX		12/15/1979
The Rev. Jerry W. Chapman	(Retired)	Austin, TX		6/28/1980
The Rev. Charles F. Keen	(Retired)	Richmond Heights, OH		1/1/1982
The Rev. Michael P. Metcalf	(Retired)	Richardson, TX		6/26/1982
The Rev. Clayton T. Holland	(Retired)	Denison, TX		2/7/1983
The Rev. Francis D. Raffalovich	(Retired)	Georgetown, TX		5/30/1983
The Rt Rev. Paul E. Lambert	(Retired)	Monteagle, TN	Resigned, Bishop Suffragan	9/19/1984
The Rev. Beulah H. Dailey	(Retired)	Dallas, TX		6/14/1986
The Rev. Barbara S. Kelton	(Retired)	Sulphur Springs, TX		6/14/1986
The Rev. K. Michael Harmuth	(Retired)	Dallas, TX	Chaplain, Episcopal School of Dallas	8/1/1986
The Rev. Stuart M. Kent	(Retired)	Westerly, RI		11/2/1987
The Rev. Donald K. Johnson	(Retired)	Denton, TX		6/18/1988
The Rev. Robin P. Smith	(Retired)	Plano, TX	Supply Priest, Holy Trinity, Bonham	8/1/1989
The Rev. Dr. Richard G. Copeland	(Retired)	San Antonio, TX		8/6/1989
The Rev. Stephen J. Waller	(Retired)	Dallas, TX	Assisting, St. Thomas the Apostle, Dallas	9/1/1989
The Rev. Robert O. Ahlenius	(Retired)	Dallas, TX		6/1/1992
The Rev. Frederick C. Philpott, Jr.	(Retired)	Dallas, TX	Assisting, Incarnation, Dallas	9/14/1992
The Rt Rev. James M. Stanton	(Retired)	Richardson, TX	Resigned, Sixth Bishop of Dallas	3/6/1993
The Rev. Sharon K. Turner	(Retired)	LaGrange, TX		9/19/1994
The Rev. Jon N. Hollenbeck	(Out of Diocese)	Kailua, HI	Chaplain, U.S. Army	9/26/1994
The Rev. Damian G. Dollahite	(Retired)	Grand Prairie, TX		3/5/1995
The Rev. Thomas A. Pantle	(Retired)	Mineola, TX		8/7/1995
The Rev. Nancy E. Hood	(Retired)	Grand Prairie, TX		5/2/1996
The Rev. Diana N. Luck	(Retired)	Dallas, TX	Deacon, St. Matthew's Cathedral	6/29/1996
The Rev. Gail N. Gateley	(Retired)	Tigard, OR		12/14/1996
The Rev. Nancy T. Smalley	(Retired)	Waxahachie, TX		4/2/1997
The Rev. Larry P. Smith	(Retired)	Dallas, TX		8/25/1997
The Rev. James C.S. Slack	(Retired)	Mishawaka, IN		10/15/1997
The Rev. Michael J. Malone	(Retired)	Petersburg, VA		10/29/1997
The Rev. Donald W. Spafford	(Retired)	Alto, NM		6/12/1998
The Rev. Judy A. Frizzell	(Retired)	Granbury, TX	Deacon, Incarnation, Dallas	6/27/1998
The Rev. Ernest W. McAfee, Jr.	(Retired)	Richardson, TX		2/1/1999
The Rev. Canon Pamela W. Dunbar	(Retired)	Dallas, TX	Deacon, St. Matthew's Cathedral	6/21/1999
The Rev. Herbert R. DeWees	(Retired)	Dallas, TX	Assisting, St. John's, Dallas	6/3/2000

# REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING

## Saturday, November 6, 2021

The Rev. Sue A. Ross	(Retired)	Georgetown, TX	(Deacon)	6/3/2000
The Rev. B. Anderson McCarthy	(Retired)	Dallas, TX		9/12/2000
The Very Rev. Neal O. Michell	(Retired)	Dallas, TX		5/2/2001
The Rev. Joy A. Daley	(Retired)	Rowlett, TX		6/9/2001
The Rev. Virginia F. Holleman	(Retired)	Dallas, TX		6/9/2001
The Rev. Betty C. Clement	(Retired)	Paris, TX		12/19/2001
The Rev. Alyce M. Schrimsher	(Non-Parochial)	Dallas, TX	(Deacon)	12/19/2001
The Rev. Gary S. Herbst	(Retired)	Greenville, TX		9/10/2002
The Rev. Canon Jerry D. Morriss	(Retired)	Mabank, TX	Interim, St. James on the Lake, Kemp	10/10/2002
The Rev. E. Clifton Gardner	(Retired)	Richardson, TX	Assisting, Good Shepherd, Dallas	11/18/2002
The Rev. Todd H. Wetzel	(Retired)	Dallas, TX	Vicar, Our Merciful Saviour, Kaufman	12/3/2002
The Very Rev. Kevin E. Martin	(Retired)	Georgetown, TX		2/26/2003
The Rev. Canon Antonio Munoz	(Retired)	Garland, TX		5/16/2003
The Rev. Arian Gores	(Non-Parochial)	Dallas, TX		5/24/2003
The Rev. Amy G. Heller	(Non-Parochial)	Addison, TX		1/31/2004
The Rev. William J. Cavanaugh	(Retired)	Guilford, CT		3/11/2004
The Rev. Canon Dr. David L. Petrash	(Retired)	Richardson, TX	Canon Pastor & Assisting, Epiphany, Richardson	6/5/2004
The Rev. Garrin W. Dickinson	(Non-Parochial)	Plano, TX		2/3/2005
The Rev. Nancy M. Powers	(Retired)	Pottsboro, TX		5/14/2005
The Rev. Anna C. Neitzel	(Retired)	Dallas, TX	(Deacon)	6/4/2005
The Rev. M. Ross Parker	(Non-Parochial)	Lewisville, TX	(Deacon)	6/4/2005
The Rev. P. Larry Murphy, Jr.	(Retired)	Yantis, TX		7/9/2005
The Rev. Matthew S.C. Olver	(Out of Diocese)	Wauwatosa, WI	Assistant Professor, Nashotah House	11/1/2005
The Rev. David K. Krause	(Out of Diocese)	Austin, TX		6/22/2006
The Rev. Bonnie Morrill Slusher	(Retired)	Eaton, CO	(Deacon)	7/27/2006
The Rev. George Willcox Brown, III	(Out of Diocese)	Thomasville, GA	Assistant, All Saints, Thomasville, GA	7/28/2006
The Rev. Peter R.R. Getz	(Retired)	Rockwall, TX		8/1/2006
The Rev. H.W. Herrmann	(Retired)	Denton, TX		10/5/2006
The Rev. Ethel Channon	(Retired)	Mt Pleasant, TX		12/5/2006
The Rev. John D. Brown	(Retired)	Pittsboro, NC		6/2/2007
The Rev. Robert S. Dannals	(Retired)	Jacksonville, FL		8/29/2007
The Rev. Alfredo R. Williams	(Retired)	Mt Pleasant, TX	Vicar, San Marcos, Mt Pleasant	9/29/2007
The Rev. Carol G. Hobson	(Retired)	Denton, TX		11/10/2007
The Rev. Diana G. Freeman	(Retired)	Mt Pleasant, SC		12/2/2007
The Rev. J. Paul Thomas	(Retired)	Duncanville, TX		10/18/2008
The Rev. Michael B. Cover	(Out of Diocese)	Milwaukee, WI	Assistant Professor, Marquette University	6/6/2009
The Venerable Rosemary Trei	(Retired)	Duncanville, TX	Archdeacon, St. Luke's, Dallas	6/6/2009
The Rev. Ashley M. Classen	(Retired)	Keller, TX	Assisting, St. Mary's, Irving	6/11/2011
The Rev. Diana P. LaCrosse	(Retired)	Grapevine, TX	Deacon, Redeemer, Irving	8/2/2011
The Rev. Matthew D. Larsen	(Out of Diocese)	New Haven, CT	Fellow Lecturer, Princeton University	12/10/2011
The Rev. George Hoxie	(Out of Diocese)	Punta Gorda, FL		4/3/2012
The Rev. Paul D. Wheatley	(Out of Diocese)	South Bend, IN		5/31/2012
The Rev. Joanna E. George	(Retired)	Frisco, TX	Deacon, St. Philip's, Frisco	11/29/2013
The Rev. Lamuel G. Salik	(Retired)	Garland, TX		1/31/2014
The Rev. Leslie A. Stewart	(Non-Parochial)	Plano, TX		6/14/2014
The Rev. Canon Rene Somodevilla	(Retired)	Dallas, TX	Interim, St. Barnabas, Garland	10/1/2014
The Rev. C. Jeff Kraemer	(Retired)	Prosper, TX		3/31/2015
The Rev. John Thorpe	(Out of Diocese)	St. Louis, MO		5/8/2015
The Rev. James P. Loughren	(Retired)	Dallas, TX		10/9/2015
The Rev. Virginia M. Kivel	(Retired)	Garland, TX		6/4/2016
The Rev. Ryan Waller	(Non-Parochial)	Dallas, TX	SUSPENDED	1/6/2017
The Rev. Pamela C. Fairley	(Non-Parochial)	Cincinnati, OH		6/24/2017
The Rev. David J. Thompson	(Non-Parochial)	Boston, MA	Associate, Advent, Boston	7/6/2017
The Rev. M. Randall Melton	(Retired)	Kemp, TX		8/15/2017
The Rev. Canon Dr. Victor Lee Austin	(Retired)	Dallas, TX	Theologian-in-residence	10/2/2017
The Rev. Jennifer G. Smith	(Non-Parochial)	Frisco, TX	(Deacon)	11/18/2017
The Rev. John D. Schmidt	(Non-Parochial)	McKinney, TX	Associate, All Angels, New York, NY	6/2/2018
The Rev. Donald J. Griffin	(Out of Diocese)	West Palm Beach, FL		1/2/2019
The Right Rev. Michael G. Smith	(Retired)	Buffalo, MN	Assistant Bishop	5/14/2019
The Rev. John Garang Alier	(Non-Parochial)	Arlington, TX		12/4/2019
The Rev. M. Logan Hurst	(Non-Parochial)	Richardson, TX		1/4/2020
The Rev. Samuel B. Adams	(Non-Parochial)	Dallas, TX		9/14/2020

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Saturday, November 6, 2021

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<b>Number of Canonical Clergy (September 1, 2020) - corrected</b>	<b>187</b>
Received	3
Transferred	4
Ordained Priest	1
Ordained Deacon	3
Deceased	5
Restored	0
Removed	0
<b>Number of Canonical Clergy (August 31, 2021)</b>	<b>184</b>

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**CLERGY RECEIVED**

September 1, 2020 to August 31, 2021

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The Rev. Samuel B. Adams	Tennessee	9/14/2020
The Rev. David J.A. Halt	Springfield	10/9/2020
The Rev. Janice Honea	Central Florida	8/3/2021

**CLERGY TRANSFERRED**

September 1, 2020 to August 31, 2021

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The Rev. Matthew E. Burdette	Pennsylvania	10/13/2020
The Rev. Jonathan Paul Totty	Texas	3/3/2021
The Rev. James Detrich	Oklahoma	5/13/2021
The Rev. James W. Harris, Jr.	West Missouri	7/13/2021

**PRIESTS ORDAINED**

September 1, 2020 to August 31, 2021

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The Rev. R. Trent Pettit	Ordained By: The Rt Rev. George R. Sumner	11/29/2020
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**DEACONS ORDAINED**

September 1, 2020 to August 31, 2021

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The Rev. Miguel A. Carmona-Romero	Ordained By: The Rt Rev. George R. Sumner	3/13/2021
The Rev. Audrey Sutton	Ordained By: The Rt Rev. George R. Sumner	3/21/2021
The Rev. Mary Kate Gerber	Ordained By: The Rt Rev. George R. Sumner	4/10/2021

**CLERGY DECEASED**

September 1, 2020 to August 31, 2021

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The Rev. Raymond C. Ball	10/18/2020
The Rev. James W. Murphree	12/7/2020
The Rev. Roger Dee Button	4/16/2021
The Rev. Powell Eugene Baker	6/26/2021
The Rev. A. Patterson Young, Jr.	7/15/2021

**CLERGY RESTORED**

September 1, 2020 to August 31, 2021

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NONE

**CLERGY REMOVED**

September 1, 2020 to August 31, 2021

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NONE

# OFFICIAL ACTS OF THE BISHOPS

January 1, 2020 to December 31, 2020

**The Right Reverend George R. Sumner, Bishop of Dallas**

Baptism	0
Confirmation	61
Reaffirmation	2
Reception	7

**The Right Reverend Michael G. Smith, Assisting Bishop**

Baptism	0
Confirmation	0
Reaffirmation	0
Reception	0

**The Right Reverend James M. Stanton, Resigned**

Baptism	0
Confirmation	1
Reaffirmation	0
Reception	0

**The Right Reverend Fraser Lawton, Assisting Bishop**

Baptism	0
Confirmation	1
Reaffirmation	1
Reception	0

**The Right Reverend Wayne Smith, Visiting Bishop**

Baptism	0
Confirmation	0
Reaffirmation	0
Reception	0

**TOTALS**

<b>Baptism</b>	0
<b>Confirmation</b>	63
<b>Reaffirmation</b>	3
<b>Reception</b>	7

Athens, St. Matthias	Confirmation	1
	Reaffirmation	1
Dallas, Good Shepherd	Confirmation	15
Dallas, Incarnation	Confirmation	27
Dallas, St. James	Reception	1
Dallas, St. Matthew's Cathedral	Confirmation	4
	Reception	2
Dallas, St. Thomas	Confirmation	2
	Reception	2
Dallas, Transfiguration	Reception	1
Lewisville, Annunciation	Confirmation	3
	Reaffirmation	1
	Reception	1

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
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McKinney, St. Peter's	Confirmation	8
	Reaffirmation	1
Terrell, Good Shepherd	Confirmation	3

**CORPORATION OF THE EPISCOPAL DIOCESE OF DALLAS  
BOARD OF TRUSTEES**

2020

**The Corporation of the Episcopal Diocese of Dallas holds title to real property for the benefit and use of parishes, missions, Diocesan Institutions and the Diocese. The following summarizes actions taken by the Board of Trustees during 2020:**

February 24, 2020	St. Mark's (Irving) Land Swap – Authorized a land swap between St. Mark's & the City of Irving.
June 3, 2020	Christ Church (Dallas) Kessler Court Condominium Sale – Authorized the sale of a condominium, held for the benefit of Christ Church, for a sales price of at least \$270,000.
June 18, 2020	Good Shepherd (Dallas) Property Sale – Authorized the sale of a residence at 4155 Northaven Road in Dallas, held for the benefit of Good Shepherd, for a sales price of \$375,000.
June 23, 2020	St. Philip's (Frisco) Loan Refinance & Line of Credit – Authorized a term mortgage loan with Texas Republic Bank in the amount of \$4,750,000.00, to be secured by a first lien on the property located at 6400 Stonebrook Parkway, Frisco, held for the benefit of St. Philip's & a revolving line of credit with Texas Republic Bank in an amount not to exceed \$150,000.00 to be secured by a second lien on the St. Philip's Property.
December 3, 2020	Holy Cross (Dallas) Property Sale – Authorized the sale of the property located at 4052 Herschel Avenue, Dallas, & held on behalf of Holy Cross, for a sales price of approximately \$2,000,000.
December 3, 2020	Election of Officers for the 2021 term: The Right Reverend George R. Sumner – Chairman (ex officio) Timothy A. Mack – President William Beecherl – Vice President G. Thomas Graves, III – Treasurer Susan Lee Mills – Secretary (non-voting)  Endowment of the Episcopate – Authorized a disbursement of \$95,000 to the 2021 Diocesan operating budget for the Bishop's compensation.

**STANDING COMMITTEE**

2020

**I. RECOMMENDATIONS MADE FOR:**

**A. Candidate for Holy Orders**

March 19, 2020

Approved to recommend Mrs. Kate Gerber for Candidacy.

September 8, 2020

Approved to recommend the Rev. Adriana Elliott, Deacon, for Candidacy.

October 13, 2020

Approved to recommend Mr. Miguel Carmona for Candidacy.

Approved to recommend Mrs. Audrey Sutton for Candidacy.

November 10, 2020

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
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Approved to defer decision on approving Mr. Peter Schellhase for Candidacy until more information could be considered.

December 8, 2020

Voted to decline a recommendation of Candidacy for Peter Schellhase at this time.

**B. Ordination to the Diaconate**

March 19, 2020

Approved to recommend Mr. Trent Pettit for Ordination to the Diaconate.

**C. Ordination to the Priesthood**

October 13, 2020

Approved to recommend the Rev. Trent Pettit, deacon, for Ordination to the Priesthood.

**II. CONSENT TO RENUNCIATION OR ABANDONMENT OF THE MINISTRY**

None

**III. CONSENT TO RESTORATION OF RIGHTS AND PRIVILEGES OF THE ORDAINED MINISTRY**

None

**IV. CONSENT TO REMOVAL FROM MINISTRY**

February 11, 2020

Consented to accept the voluntary request of Kenneth Leocyk to be removed from ministry in The Episcopal Church.

August 11, 2020

Consented to accept the voluntary request of Ryan Pollock to be removed from ministry in The Episcopal Church.

**V. CONSENT TO ELECT (TO HOLD AN ELECTION)**

None

**VI. CONSENT TO ELECTION AND CONSECRATION**

January 14, 2020

The committee expressed its non-consent to the election of the Rev. Deon Kevin Johnson as Bishop Diocesan of the Diocese of Missouri.

Approved the request to consent to the election the Rev. Frank S. Logue as Bishop Diocesan of the Diocese of Georgia.

February 11, 2020

Approved the request to consent to the election of the Rev. Poulson Reed as Bishop Diocesan of the Diocese of Oklahoma.

April 14, 2020

Approved the request to consent to the election of the Very Rev. Craig Loya as Bishop Diocesan of the Diocese of Minnesota.

Approved the request to consent to the election of the Rev. Dr. Glenda S. Curry as Bishop Diocesan of the Diocese of Alabama.

October 13, 2020

Approved the request to consent to the election of the Rev. Diana Akiyama, PhD, as Bishop Diocesan of the Diocese of Oregon.

**VII. PERMISSION TO BORROW (General)**

August 11, 2020

Read into the minutes the previously approved resolution to allow St. Philip's, Frisco to enter into two loan transactions.

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
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**VIII. PERMISSION TO SELL**

March 19, 2020

Approved request to allow Good Shepherd, Dallas to sell the residential property located at 4155 Northaven Road, Dallas, contingent on approval of the Corporation.

June 9, 2020

Approved the request from Christ Episcopal Church Dallas to sell Condominium Unit 28, Building G, the Highlands, a condominium regime located in Dallas County, Texas, known as 2155 Kessler Court, Dallas, TX 75280.

August 11, 2020

Approved the request to allow St. Stephen's, Sherman to sell their small parking lot to Grayson County.

**IX. GENERAL**

January 15, 2020

Approved the request to appoint Mrs. Wendy Skorburg to fill the unexpired term on the Commission on Ministry vacated by Mr. Dewey Bertram.

February 11, 2020

Approved to accept Holy Nativity Episcopal Church, McKinney's voluntary restoration to mission status.

Approved the Corporation's request regarding the disposition of liturgical assets following the dissolution of Church of the Savior (COTS), Allen.

September 8, 2020

Approved the request to change the format of the annual diocesan convention to a virtual meeting held via Zoom or a similar online format rather than in person on Saturday, November 7, 2020.

October 13, 2020

Resolved to concur with the bishop's interpretation of EDOD Canon 2.1 regarding lay delegates to the diocesan convention. The Standing Committee concurs with the Bishop Sumner's interpretation, made in consultation with the Chancellor, that the reference in Canon 2.1 to "the year ending December 31 next preceding the Diocesan Convention" should be interpreted to mean the latest year preceding the Diocesan Convention for which meaningful annual average Sunday attendance data is available. Given the exigencies of the Coronavirus pandemic, the latest year for which meaningful annual average Sunday attendance data is available is 2019. This interpretation is specifically confined to Canon 2.1.

Approved the request from Church of the Holy Cross, Dallas ("Holy Cross") to sell to Trinity Church International the property located at 4052 Herschel Avenue, Dallas, Dallas County, Texas described as Lots 10, 11, 12 and 40ft. of 13, Block 6/2033, held by the Corporation on behalf of Holy Cross; and further for a sales price of approximately \$2,000,000 and shall obligate the buyer to host the Holy Cross congregation until Easter 2022; and the sale is subject to final approval by the Vestry of Holy Cross and the Corporation of the Diocese; and further, the committee understands and consents that Corporation intends to use \$800,000 of the proceeds from the sale to meet a prior commitment to help the parish of St. Barnabas, Garland, with their capital expansion project; and further that the personal property of the Holy Cross not included in the sale will be disbursed by the parish while they maintain parish status.

November 10, 2020

Elected the Rev. Canon Victoria Heard as President of the Standing Committee.

Elected Mr. Tim Mack as Secretary of the Standing Committee.



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Saturday, November 6, 2021

**EXECUTIVE COUNCIL**  
2020

The Executive Council of the Episcopal Diocese of Dallas administers the Missionary, Social Service and Christian Education work of the Diocese and is charged with the fiduciary responsibility of budget and finances of the Diocese. It also discharges such other duties as may be entrusted to it by the Convention.

**2020 ACTIONS OF EXECUTIVE COUNCIL**

**January 2020**

No meeting was held.

**February 11, 2020**

The financial reports for Year-end 2019 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

The financial reports for January 2020 were presented. Ms. Jolayne LaCour moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

A banking resolution removing Mary Z. Sonom & Cathleen O'Brien Dolt and adding Greg Fox was proposed. Ms. LaCour moved that the resolution be approved. No second was required as the resolution had previously been approved by the Finance Committee. Motion carried.

The 2020 housing allowance resolution for The Revd John Schmidt was presented. Mr. Ellis moved that the resolution be accepted. No second was required as the resolution had previously been approved by the Finance Committee. Motion carried.

Bishop Sumner requested a revision of December's tabled motion to end the "Support of the Broader Church" option with an effective date of September 1, 2020 instead of January 1, 2021. Ms. LaCour moved that the tabled motion be taken up for consideration. Mr. Ellis seconded. Motion carried. Mr. Ellis moved that the motion be amended to an effective date of September 1, 2020. Ms. LaCour seconded. Motion carried. Mr. Ellis moved that the amended motion be accepted. Ms. Ichilian seconded. Discussion followed. Motion carried.

Ms. Ticoy Young recommended, with the closing of Church of the Savior (Allen) effective 31 January, the parish's remaining 2020 assessment of \$5,684.25 be removed from the 2020 budget (offset by line item – Allowance-Uncollected Assessments). Ms. LaCour moved that the budget change be accepted. No second was required as the motion had previously been approved by the Finance Committee. Motion carried.

Ms. Susan Mills, Missioner for Diocesan Services, announced that, due to the Diocese's five-year loss history of 140%, Church Insurance (CIC) would be raising deductibles for all entities to the following:

- Tornado, Wind & Hail – 1% of building value or \$10,000 (whichever is greater)
- Property - \$10,000

Additionally, depending on an entity's individual five-year loss history, premiums would be increased between 5%-13%. It was the recommendation of the Diocesan Insurance Committee that the premium increases "be flattened" to 8% for all entities. Ms. Mills also announced that CIC was offering a 3% reduction in premium to any entity participating in CIC's new Alacrity Program. It was the recommendation of the Diocesan Insurance Committee that all entities be enrolled in the Alacrity Program with parishes being given the option to opt-out & missions/mission stations eligible to opt-out with the permission of the Bishop. The Finance Committee endorsed both recommendations. Ms. Pat Bostian moved that the both the 8% premium increase & the enrollment of all entities in the Alacrity Program be approved as recommended. Ms. Misty Keasler seconded. Discussion followed. Motion carried.

Ms. Sonom was recognized & thanked for her outstanding service to the Diocese as Treasurer. Bishop Sumner introduced Mr. Greg Fox & Ms. Alison Fox, who will be our Treasurer team. Mr. Fox will be serving in the official capacity as Diocesan Treasurer.

**March 2020**

No meeting was held.

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
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**April 14, 2020 (via Zoom)**

The financial reports for February & March 2020 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

Assessment adjustment requests from Good Samaritan (Dallas) & St. William Laud (Pittsburg) were presented. Good Samaritan is requesting a reduction from \$5,609 to \$4,487. St. William Laud is requesting a reduction from \$11,545 to \$10,145. The recommendation of the Finance Committee to Executive Council is that these requests be denied & Congregational Development grants be awarded in the amounts of \$1,122 to Good Samaritan & \$1,400 to St. William Laud.

An assessment adjustment request from St. Anne (DeSoto) was presented. St. Anne is requesting a reduction from \$38,886 to \$26,886. The recommendation of the Finance Committee to Executive Council is that the request be denied & a meeting scheduled between the parish leadership & the Canon to the Ordinary.

An assessment adjustment request from St. Philip's (Frisco) was presented. St. Philip's is requesting a reduction from \$196,687 to \$160,090 (a total reduction of \$36,597). The recommendation of the Finance Committee to Executive Council is that this request be approved.

A request for permission to revise the 2018 Parochial Report for Holy Nativity (Plano) was presented. The parish's Normal Operating Income (Line A) was overstated by \$51,942. A correction to this entry would decrease the parish's 2020 assessment from \$47,729 to \$41,496 (a total reduction of \$6,233). The recommendation of the Finance Committee to Executive Council is that this request be approved.

An assessment adjustment request from Holy Nativity (Plano) was presented. Holy Nativity is requesting a reduction from the corrected amount of \$41,496 to \$20,748 (a total reduction of \$20,748). The recommendation of the Finance Committee to Executive Council is that this request be approved.

Mr. Ellis moved that all recommendations of the Finance Committee for assessment adjustment requests be accepted. Ms. Misty Keasler seconded. Motion carried.

A banking resolution removing Michael Gilton and adding Alan Dunlop was proposed. The Revd Craig Reed moved that the resolution be approved. No second was required as the resolution had previously been approved by the Finance Committee. Motion carried.

Mr. Fox presented a recommendation from the Finance Committee that the Diocese apply for a loan under the terms of the CARES ACT Paycheck Protection Program ("PPP"). Mr. Ellis moved that the recommendation of the Finance Committee be accepted. Ms. Keasler seconded. Motion carried.

Bishop Sumner requested that the amount set aside in the 2020 budget for "Support of the Broader Episcopal Church" (\$463,878 - approximately 12% of the Diocese's Assessment Revenue) be sent, in its entirety, to support the Budget of the General Convention & that the full assessment (15% of Diocesan Revenues) be paid in 2021. Ms. LaCour moved that the request be approved. Mr. Ellis seconded. Motion carried.

**May 12, 2020 (via Zoom)**

The financial reports for April 2020 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

A revised 2020 budget, recommended by the Finance Committee & reflecting the decrease in assessment revenue due to the "forgiveness" of the April payments & the expense cuts necessitated, was presented. Mr. Ellis moved that the revised budget be accepted as presented. Mr. Craig Fowler seconded. Motion carried.

**June 9, 2020 (via Zoom)**

The financial reports for May 2020 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

A housing resolution for The Revd Logan Hurst was presented. Mr. Craig Fowler moved that the resolution be approved. Ms. Pat Bostian seconded. Motion carried.

A request from Christ Church (Dallas) for permission to sell a condominium left to the parish by The Revd A. Harrison Lee was submitted. Ms. Misty Keasler moved that permission be granted. Ms. LaCour seconded. Motion carried.

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**July 2020**

No meeting was held.

**August 11, 2020 (via Zoom)**

The financial reports for June & July 2020 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

The 2021 Preliminary Budget was presented. Mr. Ellis moved that the Budget be approved as presented. Mr. Will Beecherl seconded. Motion carried.

A request from St. Stephen's (Sherman) to sell a parcel of land to the City of Sherman was presented. Ms. Misty Keasler moved that the request be approved. Mr. Ellis seconded. Motion carried.

**September 8, 2020 (via Zoom)**

The financial reports for August 2020 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

Changes to the Diocesan Staff section of the 2021 Proposed Budget were presented. These changes did not affect the subtotal for the Diocesan Staff section or the overall total to the 2021 Budget itself. Mr. Ellis moved that these changes be approved as presented. Ms. LaCour seconded. Motion carried.

**October 13, 2020 (via Zoom)**

The financial reports for September 2020 were presented. The Revd Craig Reed moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

Bishop Sumner nominated The Revd Jennifer Smith to fill the clergy seat (term ending 2021) that was vacated by The Revd Andy Johnson earlier in the year. Ms. LaCour moved that the nomination be accepted. The Revd Fabian Villalobos seconded. Motion carried.

**November 7, 2020 (via Zoom)**

The One Hundred Twenty-fifth Annual Meeting was held online.

**December 8, 2020 (via Zoom)**

The financial reports for October 2020 & November 2020 were presented. Mr. Ellis moved that the financial reports be accepted. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

The 2020 Financial Audit for the Diocese was received from the Audit Committee.

The 2021 Housing Resolution for Diocesan clergy was presented. Mr. Ellis moved that the Resolution be approved. No second was required as the Resolution had previously been approved by the Finance Committee. Motion carried.

## REPORTS OF ORGANIZATIONS AND COMMISSIONS OF THE DIOCESE OF DALLAS

### CAMP ALL SAINTS 2020

**Summer Camp Financials:**

2020 Summer Camp was cancelled due to COVID-19.

**Summer Camp Enrollment:**

In 2020 we had no campers due to COVID-19.

**Overall Budget:**

Staff was furloughed Sept 1<sup>st</sup> due to COVID-19.

Sandi Creswell stayed as only full-time employee.

Brought in part time staff, as needed.

**Facility Progress:**

Dining Hall, completed construction from the fire in 2019 (Insurance)

Fireplace

Mantle

Ceiling/Insulation

Painting

Cabins, replumbed with hot & cold water (generous donor)

Motels 5,6,7 had updates from water heaters flood damage (Insurance)

Countertops

Vanity

Flooring

Paint

**Rentals:**

Renting Eagle House & Owl's nest

Submitted by: Mrs. Sandi Creswell, Operations Director

### CHRISTIAN FORMATION COMMISSION 2020

The Christian Formation Commission exists to be a catalyst for the work of Christian Formation in our whole diocese. In February 2020, we led our annual workshop, featuring the Rev. Dr. Chip Prehn, who spoke about Christian Education and William Augustus Muhlenberg. Additional workshops were held on a variety of topics including Godly Play, youth ministry, Children's Chapel, and Confirmation. In addition to our annual workshop, we purchased VBS kits for churches upon request and other educational resources for our diocesan resource room, allowing churches with small budgets to have access to up-to-date resources.

Submitted by: The Rev. Canon Dr. Jordan Hylden, Canon Theologian

### CHURCH PLANTING COMMISSION AND HISPANIC MINISTRIES 2020

The Church Planting Commission did not meet in 2020 due to the restrictions placed upon us by COVID, transitions in diocesan staffing (going from a full-time Canon to the Ordinary to a part-time Canon for Congregations), and reassignment of the diocesan church planting resident to a traditional curacy. However, the following congregations continued to receive

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financial support from the church planting budget in furtherance of the mission of spreading the Good News of Jesus: Holy Faith, Dallas; Resurrection, Plano; San Marcos, Mt. Pleasant; Grace Community, Plano; St. Philip's Sudanese, Dallas.

Submitted by: The Very Rev. Robert P. Price, Canon for Congregations

**CLERGY CONFERENCES AND CONTINUING EDUCATION**  
2020

Due to the COVID-19 Pandemic in 2020, we were not able to offer our regular slate of in-person Clergy Conferences. We shifted to an online format and offered monthly continuing education seminars on various topics including Evangelism, Small Group Ministry, Racial Reconciliation, Mental Health, Hispanic Ministry, and Christian Leadership.

Submitted by: The Rev. Canon Dr. Jordan Hylden, Canon Theologian

**CLERGY FAMILY COMMISSION**  
2020

Due to Covid, there were no expenses for the Clergy Family Commission in 2020.

Submitted by: Mrs. Stephanie Hodgkins

**COLLEGE MINISTRY COMMISSION**  
2020

The College Ministry Commission had no activities in 2020.

Submitted by: Mrs. Jolayne LaCour, College Ministry Commission Chair

**COLLEGE OF DEACONS**  
2020

The College of Deacons is an essential ministry in the diocese, called to model servant ministry for others, to interpret to the Church the needs, concerns, and hopes of the world. Deacons are called to engage members of the church in the mission of meeting the needs, sharing the concerns and kindling the hopes of others. Deacons live into this call in a wide variety of ways.

Some deacons serve on the bishop's staff, and on diocesan councils and commissions. For example, Deacon Mark Hall serves as the Diocesan Deacon for Outreach and Social Justice (appointed by Bishop Sumner in 2017). His charge is to facilitate EDOD parishes in reaching out to our brothers and sisters in Christ through the Greater Dallas Coalition, and to serve as a resource for outreach ministry generally in EDOD. Deacon Jennifer Smith was appointed by Bishop Sumner this year to work with Carrie Headington as head of the racial healing, justice and reconciliation commission. She also, along with other medical personnel, provided the Bishop with medical information to help navigate the COVID waters. Some deacons are active in Kairos ministry, some serve as hospital chaplains, and some have served as deans for summer camp at Camp All Saints. Deacons are participants and leaders in both domestic and world-wide mission efforts and active in the Dallas community on boards and commissions. Deacons are retreat leaders and community gardeners; deacons are involved in healing ministries like Community of Hope and Stephen Ministry. In their parishes, deacons help organize outreach activities, are leaders in Christian education (Education for Ministry, Christian Formation, Bible Study), and offer pastoral care to the sick and the homebound. Deacons accompany the bishops on visitations to the parishes.

The annual deacons' meeting with the bishop was held at the Diocesan Office on February 1, 2020. Bishop Sumner led a discussion of a reading from Miroslav Volf and then celebrated Eucharist with us. 17 of the 21 currently active deacons were present. Following lunch, each deacon shared about their ministry, their joys and their challenges.

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In the first week of March, Rosemary represented our diocese at the AED Archdeacons Conference in Jacksonville, Florida. Many good ideas were shared about helping all members of our dioceses be aware of the role of deacons and also encouraging folks to discern possible calls to the diaconate. That was the last weekend before COVID shut things down!

At the AED Conference, Rosemary participated in plans with other archdeacons in our province to have a Province VII deacons meeting. Instead of being an in-person experience, plans were altered, and we gathered in July and again in August by Zoom, with over 30 deacons gathered each time. Plans were made to hold a Preaching Conference for Deacons of Province VII, presented by the Episcopal Preaching Foundation. This event was held Sept 26-27, and more than 25 deacons from across Province VII participated in the zoom conference, including 5 from our Diocese. In August and September Rosemary lead our diocesan deacons in a discussion of Latasha Morrison's book, "Be the Bridge," a study of systemic racism in our country and ways we can begin the conversations needed to move towards racial reconciliation.

In November, in response to the two hurricanes that hit back-to-back in Honduras, Archdeacon Rosemary, in collaboration with Carol Taylor, Jamey Ryan, and other members of the St. Luke's Honduras Mission Team, organized the gathering of clothes, household goods, health and food supplies to be sent to Bishop Lloyd Allen in Honduras. There was a wonderful response diocesan wide, and a full container was shipped to Honduras in December.

Because of COVID, we were unable to hold a deacon's retreat this year. Rosemary and Deacon Jennifer Smith, along with Carrie Headington, helped organize a conference "The Cost of COVID", presented in cooperation with UNITE, and presented by Zoom to all clergy the day before Diocesan Convention.

This year, Bishop visitations ceased in March because of COVID, so only 7 visits were made by deacons accompanying the bishop. As of December, we have 22 active deacons (5 not canonically resident) and 4 retired deacons in the diocese.

Submitted by: The Venerable Rosemary R. Trei, Archdeacon

### COMMISSION ON EPISCOPAL SCHOOLS

2020

The Committee did not meet in 2020.

Submitted by: The Rev. Tom Smith

### COMMISSION ON MINISTRY

2020

The Commission on Ministry (COM) fulfills the canonical requirement to advise the Bishop in the implementation of Title III.6 and III.8 of the Canons of The Episcopal Church, in the determination of the present and future needs for ministry, and in the design and oversight of the process for recruitment, discernment, formation, and assessment of persons for ministry.

The Commission conducted 9 meetings over the course of the year to examine and interview those responding to a call for Holy Orders. Those sessions included:

- hosted 7 aspirants at the annual discernment retreat,
- interviewed 9 nominees for postulancy
- interviewed 5 postulants for candidacy
- interviewed 1 candidates for Diaconate
- interviewed 1 deacons for the priesthood
- there was 1 candidate examined by the Board of Examining Chaplains, a sub-committee of the Commission.

The Commission is a dedicated group of 18 members plus 2 Ex-Officio members from across the diocese. I thank the members of COM for their commitment of time, their prayers, and their dependence on our Lord for discernment for all ministry vocations both ordained and lay. It is with great pleasure I serve as chair to this group under the direction of our bishop.

Submitted by: Mrs. Sandra B. Mebus, Chair of the Commission on Ministry

### **COMMISSION ON STEWARDSHIP**

2020

The Commission on Stewardship did not meet in 2020. However, the Diocese did procure a membership in the TENS network in order to provide parishes with free resources and perspectives for running their own stewardship campaigns.

Submitted by: The Very Rev. Robert P. Price, Canon for Congregations

### **COMMUNICATIONS**

2020

Communications had a busy year due to COVID. The department began to livestream meetings, funerals, weddings, church services, etc. The department developed a podcast system in addition to increased video production to enhance EDOD communications and programming to the diocese. Additionally, the department developed an online donation system and helped small parishes procure online meeting software, websites, and video equipment so they could continue to be the Church during the global pandemic. Fresh content helped to keep the diocese connected throughout the year, such as Bishop George Sumner's COVID updates and catechesis blog, an online COVID Hub with important protocols and safety information, Bishop Michael Smith's blog, Postils from a Potawatomi Preacher, Canon Jordan Hylden's online continuing education programs and Canon Carrie Headington's food donation updates, among others.

Submitted by: Mrs. Kimberly Durnan, Director of Communications

### **CONGREGATIONAL DEVELOPMENT**

2020

In 2020 the work of the Diocese in congregational development focused on "getting us all across the wilderness [of the COVID pandemic] together." One essential element of this effort was the financial support of the following congregations, many of which were hit especially hard by the COVID pandemic: St. Francisco de Asis, Dallas; St. Christopher's, Dallas; Our Merciful Savior, Kaufman (in a bold show of faithfulness, this congregation did not request support for 2021); St. Matthias, Athens; The Gathering, Dallas; St. Barnabas, Garland; St. Mary's, Irving; Emmanuel Anglican, Garland; St. Andrew's, Farmers Branch; St. Dunstan's, Mineola; Santa Natividad, Plano; and St. Paul's, Waxahachie (Ellis County). Additionally, the Congregational Development ministry of the Diocese assisted various congregations in clergy recruitment and deployment and in negotiating diverse challenges in program, congregational dynamics, and COVID-protocol compliance.

Submitted by: The Very Rev. Robert P. Price, Canon for Congregations

### **CONVENTION ARRANGEMENTS COMMITTEE**

2020

The Rt. Reverend George Sumner selected the theme for the 2020 Convention: *Our Ancient – Modern Future: "Ride Like Cowboys, Pray Like Saints, Preach Like Apostles"* -The Right Rev. Alexander Garrett

The Planning Committee for the 125<sup>th</sup> Annual Convention of the Diocese of Dallas began preparation meetings in May of 2020 with a detailed timeline of events submitted to guide our work. Given the prevalence of COVID-19 in Texas it was determined that a special committee be appointed to guide us through alternatives to an in-person Convention for 2020. The newly formed committee was chaired by David Parsons and included the Rev. Michael Mills, Tim Mack, Ellen Williamson, Bob Buchanan, the Rev. Robert Price, and Mark & Terry Demler.

The Special Committee working in conjunction with the Planning Committee of The Rt. Rev. George Sumner, The Rev. Robert Price, Virginia Wider, Amy Wooten, Ticoy Young, Susan Mills, Kim Lanore, Laura Faulkner, Kimberly Durnan, and Co-Chairs Mark and Terry Demler made the decision to hold a virtual Convention via Zoom on Saturday, November 7, 2020.

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The responsibilities of these Committees were to satisfy the Constitution and Canons of the Diocese while keeping the health and welfare of Convention attendees in our plans.

On September 3, 2020, a final Rules of Procedure was published that guided our actions for the virtual Convention. In addition to the Rules of Procedure, it was decided that initial ballots for Convention nominations and budget approvals would be distributed in advance of the Convention to expedite the proceeding in the virtual Convention.

On November 7, 2020, the 125<sup>th</sup> Diocesan Convention began with Morning Prayer and a sermon by The Rt. Rev. Lloyd Allen. The Convention was then called to order and the Rules of Procedure, Credentials, and Agenda were adopted.

The first virtual Convention of The Diocese of Dallas was conducted as planned and positive feedback was received from Convention Delegates and Clergy for the content and brevity of the proceedings. Considering the extraordinary circumstances, the 2020 EDOD Convention was considered very successful!

Submitted by: Mr. and Mrs. Mark and Terry Demler, Co-Chairs, Convention Planning Committee

### **CURATE DEVELOPMENT**

2020

During the program year, our diocesan curates gather each month to discuss and think theologically about some aspect of ministry, led by one of our diocesan clergy or another guest leader and focused by assigned reading. Our aim is for our curates to grow in practical skills for ministry and for the priestly life, to think theologically about all aspects of ministry practice, and to build a cohort of friends and colleagues. In 2020, due to the pandemic, much of this shifted to an online format. Curacy grants from EDOD help fund multiple curates each year, along with their ongoing development. On the whole, we in EDOD are able to place and train more curates for future ministry than most dioceses, which is a blessing for our diocese and for the wider church.

Submitted by: The Rev. Canon Dr. Jordan Hylden, Canon Theologian

### **EPISCOPAL CENTER FOR RENEWAL**

2020

The Episcopal Center for Renewal cancelled all retreats for the year 2020 due to the COVID-19 pandemic. During the year, we began work on a video series, which is planned to be completed in 2021. In 2020, the Center took in \$8,935 and incurred expenses of \$6,771. The majority of the expenses supported down payments for future retreats, office expenses, and video production costs. The Center has \$2,321 in the General Fund and \$37,643 designated for Renewal in the Diocese of Dallas. We hope to resume operations in late 2021 or 2022.

Thank you to all who support this ministry, and we ask your prayers for the renewal of God's Church.

Submitted by: The Rev. Robert M. Corley, Executive Director of the Episcopal Center for Renewal

### **EPISCOPAL FOUNDATION OF DALLAS**

2020

#### **Organization**

The Episcopal Foundation of Dallas ("the Foundation") was established by the Diocesan Convention of 1950. It is organized as a Texas non-profit corporation and is qualified as a Section 501(c) (3) exempt organization. The Foundation exists to strengthen and support faith communities by partnering wise investments with purposeful giving. It offers investment management services within the Episcopal Diocese of Dallas and supports organizations within the Diocese through its annual grant program. The Foundation is professionally managed and is governed by a Board of Trustees, all of whom are committed to good stewardship, prudent investment and faithful disbursement of the funds entrusted to the Foundation. The Bishop of the Episcopal Diocese of Dallas serves as an ex officio member of the board.

#### **Investment Services**

The Foundation's investment management services are available to any parish, mission, school or other non-profit Episcopal organization in the Diocese.



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All investment assets are pooled and invested according to a diversified asset allocation described in our investment policy. This structure creates an opportunity for clients to invest at reduced fees not otherwise available to smaller investors. The portfolio includes actively- and passively-managed mutual funds, diversified both as to fixed income and equity holdings with an aim of long-term growth. Members of the Investment and Finance committee have decades of experience in multiple investment institutions are responsible for the supervision of the portfolio of the Foundation.

### **Donor Advised Funds**

The Foundation is now offering individuals a way to direct and manage their charitable contributions through donor-advised funds. Creating a fund with EFD allows individuals an economical way to focus on their charitable giving without the burden of paperwork or grant administration. The Foundation staff is available to assist in identifying grant opportunities within the Dioceses if needed.

### **Consider a gift or bequest to the Episcopal Fund**

The Foundation's Episcopal Fund generates income for annual grants that benefit the entire Diocesan community. A direct contribution, memorial gift or bequest to the Episcopal Fund is a meaningful way to honor a loved one's life or your own commitment to the Episcopal Church. Your gift will help the Episcopal Fund to have an even greater impact. There are many ways to donate: write a check, leave a bequest, designate the Foundation as a beneficiary on life insurance or other retirement assets, make a charitable IRA rollover contribution, or name the Episcopal Foundation of Dallas as a recipient for memorial gifts. Please contact the Foundation for more information and help us grow.

### **Annual Grant Program**

The Foundation's annual grant program exists to support the Episcopal Diocese of Dallas, its churches, schools and agencies – that means you! Our particular emphasis is toward funding programs or ministries that address the problems of poverty, homelessness, and food insecurity but Diocesan entities may apply for other needs as well. Since inception, the Foundation has awarded over \$6 million to the Diocesan community.

In February 2020, the Foundation pledged \$200,000 to the Diocese to support parishes in need of operating support as result of the COVID-19 crisis. These grants were made available through an application to the Diocese. In June 2020, the Foundation awarded an additional \$142,500 through its own annual grant program. There were 23 grants benefitting parishes, schools and non-profits throughout the Diocese.

The Foundation's sister foundation, the Episcopal Health Foundation of Dallas, which is managed by the same Board has its own annual grant program. The primary purpose of the Episcopal Health Foundation is to provide funding for medical care, medical research, and medical education. The Episcopal Health Foundation has awarded over \$8 million in grants since its inception. Applications and information are available on our website.

### **Contact Us**

If you would like to find out more about the Episcopal Foundation of Dallas' investment services, donor-advised funds, or grant program, please visit our website at [www.episcopalfoundationdallas.org](http://www.episcopalfoundationdallas.org), or contact Pam Fellows Jamieson, Executive Director at (214) 366-9996. The website includes the Foundation's most recent audited financial statements.

Submitted by: Mrs. Pam Fellowes Jamieson, Executive Director

## **EVANGELISM INITIATIVE**

2020

2020 has marked an unprecedented opportunity for the church to engage in mission as our world was ravaged by the COVID-19 pandemic. Our communities in North Texas and beyond have experienced poverty, division and despair at levels we have not seen in our life time. The parishes of the Episcopal Diocese of Dallas have been hard at work this past year, sharing the good news of Jesus Christ in word and deed, locally, nationally and internationally. They have brought hope and healing to many in need physically, emotionally, and spiritually.

The mission of the EDOD Evangelism Initiative is to resource and come alongside congregations in the Episcopal Diocese of Dallas to continue their dynamic work of personal and parish evangelism. This past year we have done this through the following work:

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1. Evangelism Workshops, Retreats and Consultations. Canon Carrie Headington has led evangelism workshops, trainings, adult education forums, and vestry retreats online (via zoom) this past year for EDOD parishes. She has also provided consulting for parishes as they seek to share good news in word and action. Additionally, she has served as guest preacher for numerous parishes throughout the year.
2. EDOD Online Alpha Course: Fall 2020. The Episcopal Diocese of Dallas ran an online Alpha course in the Fall 2020 with 17 EDOD parishes participating. This online opportunity provided a space for Episcopalians to invite their non-Christian and seeking friends to explore questions of life, faith, and meaning. We had over 100 participants.
3. PROJECT US: Unite and Serve. Project US: Unite and Serve is the Episcopal Diocese of Dallas' initiative to serve the least of these (Matthew 25) as one body (John 17). The needs of our communities and especially the poor have been exacerbated this past year due to the global pandemic. As a result, EDOD came together to be good news in action for our region. This has been carried out through the following diocesan-wide projects:
  - a. Bishop Sumner Monthly Food Grants: EDOD distributed monthly grants to parishes and ministries which fed the hungry throughout 2020. EDOD parishes (and ecumenical partners through the local churches of the Greater Dallas Coalition) have distributed over 1 million pounds of food for hungry families this past year. At each out the outreaches, prayer was also provided.
  - b. Poverty Awareness: Cost of COVID. EDOD hosted 2 online trainings which outlined the impact of COVID on those living in poverty in our region.
  - c. EDOD Online Giving: Provided toys for homeless children at Christmas and Turkeys at Thanksgiving.
  - d. Dallas Champions Academy: The Dallas Champions Academy is dedicated to the flourishing of children and youth in South Dallas physically, emotionally, academically, and spiritually. The mission was carried out this past year through an online Summer Academy (140 student participants), an online College Fair, and 10 Steps to University from which 50 high school seniors from South Dallas found placement and financial aid to college and online year-round mentoring.
  - e. Racial Reconciliation Reading Group. Clergy and laity throughout EDOD participated in an online reading group led by Deacon Jennifer Smith and read *Rediscovering the White Church* by David Swanson. Deacon Jennifer was named the Racial Reconciliation, Healing, and Justice Commission Chair which created resources for parishes.
4. Harvest Prayer Network. This EDOD network of intercessors held bi-weekly calls to cover the Diocese, our programs, parishes, and leadership in prayer. EDOD also hosted the Ecumenical Prayer Gathering for the Citywide Day of Prayer led by the Mayor of Dallas.
5. Lay Order of Evangelists. 4 new lay evangelists were commissioned in the Episcopal Diocese of Dallas. These students received formation through the Stanton School for Ministry. All lay evangelists are equipped to serve their local parish in evangelistic work.

Submitted by: Mrs. Carrie Boren Headington, Canon for Evangelism

**THE GATHERING**  
2020

The Gathering suspended operations very early in 2020 and has no report of activities.

Submitted by: Mr. Tom Hauser, Administrator

**HOLY FAMILY SCHOOL**  
2020

Founded in 1951 as a mission of the Episcopal Diocese of Dallas, Holy Family School in McKinney, Texas continued to serve the children of our community in 2020. The original vision of Father Jose and Dr. Maria Luisa Vega was to prepare the young children of migrant farm workers academically, physically and socially for public school.

Holy Family is housed in the former E.S. Doty High School building, which served as the place of public education for Collin County's African American children during segregation. Today, Holy Family honors and promotes the important educational and cultural legacy of our building, and strives to carry on the Vegas' crucial mission of making quality early childhood education accessible for all children within our diverse community. God has continued to work at this little school for over 70 years.

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Sadly, the pandemic significantly affected enrollment. Our numbers went down from approximately 65 children in 2019 to 35 children. We were closed briefly for two weeks due to several staff members needing to quarantine, but otherwise we remained open to serve our families the entire year. We were forced to temporarily discontinue our infant program due to lack of demand during COVID, so we now serve children ages 18 months to 5.

During the lockdown period of the pandemic, only 12 of our students were children of essential workers. We remained open for months with only those 12 children in attendance. We distributed food and hygiene items from our parking lot, and delivered to those unable to pick up. Our circle drive in front of the school served as the location for many socially distant drive through birthday parties in the neighborhood, and we were in regular communication with our families checking on our students and promoting various online events and discussions held by the diocese and others.

Once we were able to fully open our doors again, our enrollment numbers have grown steadily but it has been a slow process. We continue to distribute food weekly to our students, friends and neighbors in need. We are excited about the upcoming opening of our neighbor Community Garden Kitchen, and we are eager to partner with them to further address the problem of food insecurity in our area. We hope to resume care for infants and look forward to many more of our beloved students returning in the near future. New students are consistently enrolling weekly, so we feel confident that there continues to be a need for the Vegas' decades old mission of providing affordable and quality early childhood education for all in our community.

Our community partners include McKinney Roots, Collin County Meals on Wheels, McKinney Housing Authority, Community Lifeline, The Samaritan Inn, McKinney Hunger Free Coalition, North Texas Food Bank, The Alliance for Elite Youth Leadership (AEYL), The Allen Americans, One Heart McKinney, The Goddard School and as mentioned previously our neighbors at the Community Garden Kitchen. Together with our many valued friends and partners, we are committed to making sure that the children in our care have access to the very best educational opportunities, regardless of their parents' ability to pay. We embrace our rich cultural background and we celebrate our neighborhood's diversity. With the continued vital support of the EDOD, Holy Family School looks forward to many more years of ministry and service to the children of McKinney.

Submitted by: Mrs. Rachel Pittman, Holy Family Board President

### **PASTORAL CARE FOR ACTIVE AND RETIRED CLERGY**

2020

It has been frustrating to be restrained in providing pastoral care because of COVID-19 restrictions. However, now that most people have gotten their vaccinations, it is great to be able to do more traditional pastoral care, both at home as well as in institutions of healing.

The past year has seen a very gradual loosening of COVID-19 restrictions, particularly in hospitals and nursing homes. Health institutions have learned, perhaps the hard way, that health care without its spiritual component does not satisfy the whole person, nor their family. So in hospitals where we were once denied access, we have been able to gradually resume our traditional role in pastoral care.

While I have walked with clergy families during extended periods of health decline, it is amazing how much clergy retirees and their spouses appreciate just a phone call or a text message or a short note to let them know that they are not forgotten. It is an honor to be able to provide this attention and this ministry for our clergy families.

Submitted by: The Rev. Canon David Petrash, Canon Pastor

### **REAL ESTATE ADVISORY COMMISSION**

2020

- Continued to offer 7.59 acre tract in Mesquite for sale; lowered listing price to \$950,000.00. Reviewed interest from various users and brokers for potential purchase
- Continued to offer the 21 acres of land in Wylie for sale
- Reviewed Letter of Intent from Senior Housing Developers of the Wylie land
- Reviewed Letter of Intent from brokers for Multi-Family Development for Wylie land
- Reviewed and advised on the potential US Highway 380 Bypass through the Bloomdale 10 acres

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- Former All Saint's Atlanta – Continued to offer the former Church Property, Listed for Sale.
- St. Andrew's Farmers Branch – reviewed and consulted on construction of adjacent property owner on construction of parking lot
- Reviewed property issues for Allen property, former Church of the Savior
- Committee Members: Jim Riggert, Tim Mack, Jim Wiley, Rob Milbank, Guy Keeling, Chris Teesdale, Al Nix, The Rev. Chase Skorburg, David Aughinbaugh, Ex Officio: Tom Graves – Trustee and Treasurer of the Corporation of the Diocese

Submitted by: Mr. Jim Riggert, Chair

**RURAL CHURCH DEVELOPMENT**

2020

Unfortunately, the work of the Canon on behalf of our rural church communities, as is a major portion of the diocese, was restricted in its ability to function in its normal capacity during the past year. During the first quarter of the year weekly visits with the various rural congregations went unhampered and I had the opportunity to visit, preach and or celebrate in several of our rural churches.

Because of the COVID pandemic, we were unable to hold our annual Rural Church Gathering nor the Rural Clergy Gathering. While we looked into various ways to conduct these two events, which have been well attended in the past, we were unable to come up with a workable method for gathering a large number of people together in a meaningful way.

As churches began to be required to shut down, physical contact with our rural churches became impossible, so we were forced to rely on Zoom meetings, email and phone conversations. Through the balance of the year, I was amazed and pleasantly surprised to discover the many various ways that our rural clergy and their congregations found to use social media to maintain and continue much of their ministry. The methods used was as varied as are our various congregations and yet Bible study, the Daily Offices, worship services and even confirmation classes were provided along with other meaningful activities.

While this year proved to be challenge, our rural clergy have risen to the occasion in an attempt to show their congregations that the day to day life of the church is, in fact, essential to maintaining the spiritual stability of our church families. Hopefully, we will never be asked to face this kind of challenge again any time in the future.

Submitted by: The Rev. Canon Jerry Morriss, Canon for Rural Church Development

**THE STANTON CENTER FOR MINISTRY FORMATION**

2020

In 2020, the administration of The Stanton Center moved to the diocesan offices, led by The Rev. Canon Dr. Jordan Hylden, Dean, and Mrs. Laura Faulkner, administrator. Three students received diplomas at the end of the 2019-2020 academic year, but we were unable to hold a graduation ceremony due to the COVID-19 Pandemic. When the pandemic hit, The Stanton Center moved to online classes, and that format continued into the 2020-2021 academic year. For the Fall of 2020, there were 18 students enrolled in 4 different classes: Old Testament, New Testament, The Creeds, and Church History.

Submitted by: The Rev. Canon Dr. Jordan Hylden, Stanton Center Dean and Canon Theologian

**THEOLOGIAN-IN-RESIDENCE**

2020

- Wrote weekly blog "Diary of a Theologian," on diocesan website
- Led curates' retreat, and taught a day on "preaching as Anglicans" to the curates in the fall
- Some pastoral counsel or spiritual direction of clergy
- Participated in various diocesan meetings, including a gathering of clergy pursuing advanced degrees, with Bp Joseph Wandera

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- Continued being available to visit parishes, upon request, to preach, teach a class, give guest lecture, or address a special group (seniors, young adults, theology on tap). Preached at Pettit ordination. Gave brief homilies on the Major Feasts at the cathedral
- Invited clergy to Zoom discussions of books and films
- With resignation of Canon to the Ordinary, became the receiver of requests to perform marriages of divorced persons
- Contributed to *The Living Church* magazine and “Covenant” blog
- Continued participation in professional societies
- *Friendship: The Heart of Being Human*, published by Baker; led a Zoom study for APNET on friendship; interviewed for Sunday classes at St Luke’s

Submitted by: The Rev. Canon Dr. Victor Austin, Canon Theologian in Residence

**UNIVERSITY OF THE SOUTH  
REPORT TO THE DIOCESE OF DALLAS  
2020**

**College of Arts & Sciences**

- Enrollment from the Diocese of Dallas area: 33 students total (11 Episcopal students)
- Financial aid awarded to all college students from the Diocese of Dallas area: \$752,021 (\$249,908 to Episcopal students)

**The School of Theology Seminary**

- Enrollment from the Diocese of Dallas: 1 student total (1 from the Advanced Degrees Program)

**Support Received from the Diocese of Dallas: \$1,000**

**Support Received from Diocese of Dallas churches: \$ 1000**

**2020-2021 Statistics for the University of the South**

- College of Arts and Sciences total students: 1,733 (22% Episcopalian)
- Percentage of first-year students receiving a scholarship or need-based aid: 98%
- School of Theology students: 74 residential students, 74 advanced degree students
- Percentage of full-time, residential seminarians receiving a scholarship or need-based aid: 95%

**About the University of the South**

The University of the South is home to an outstanding liberal arts College of Arts and Sciences, a School of Letters, and a School of Theology. Located atop the Cumberland Plateau between Nashville and Chattanooga, Tennessee, Sewanee's 13,000-acre campus, the second largest campus in the United States, provides students with vast opportunities for research, recreation, and reflection. Within the traditionally strong curriculum of humanities, sciences, and graduate theological studies, Sewanee faculty members promote intellectual growth, critical thinking, and hands-on research.

The University's Board of Trustees is composed of the bishops of the 28 owning dioceses, together with clergy and lay representatives elected by each diocese and representatives of other University constituencies. The Board of Regents, to which the Board of Trustees delegates some of its responsibilities for governance, is composed of Episcopal bishops, priests, and lay people, and may include a limited number of members of other Christian bodies. The chancellor of the University, elected by the Board of Trustees, is a bishop from one of the 28 owning dioceses.

**An Episcopal Center of Learning**

The University of the South is an institution of The Episcopal Church dedicated to the pursuit of knowledge, understanding, and wisdom in close community and in full freedom of inquiry, and enlightened by Christian faith in the Anglican tradition, welcoming individuals from all backgrounds, to the end that students be prepared to search for truth, seek justice, preserve liberty under law, and serve God and humanity.

The University was founded by church leaders from the southeastern United States in 1857 and is the only university in the nation that is owned and governed by dioceses of The Episcopal Church, specifically the 28 dioceses that are successors to the original founding dioceses. The historic ownership and governance of the University by these Episcopal dioceses has

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produced a living synergy of leadership, resource, and mutual support, enriching the Church and advancing the University's role in American higher education.

**VOCATIONS**

2020

In 2020, we gave varying levels of financial support to ten seminarians, seven of whom were enrolled at Wycliffe College at the University of Toronto, two Nashotah House and one Trinity School for Ministry. Our commitment is to pay seminary tuition for students whom we send off to seminary, and we attempt to provide limited financial support to students already in seminary who begin discerning a call with our diocese. Of those ten, six were attending a three-year full-time residential program, one was pursuing distance learning, and four were pursuing distanced education while being mentored locally. In addition to those ten financially supported seminarians, we had fifteen other discerners at varying stages of the process. We are blessed in the diocese of Dallas with far more ordinands than most other dioceses of comparable size, and I am deeply encouraged by their faith and passion for Gospel ministry.

Submitted by: The Rev. Canon Dr. Jordan Hylden, Canon Theologian

**YOUTH MINISTRIES**

2020

Due to the COVID-19 pandemic, diocesan youth activities were suspended in March of 2020. It is hoped that a diocesan confirmation retreat for youth may be held in the fall of 2021 in order to restart this aspect of diocesan ministry.

Submitted by The Very Rev. Robert P. Price, Canon for Congregations

# 2020 Statistics

## **VITAL STATISTICS AND FINANCIAL STATISTICS FROM THE 2020 PAROCHIAL REPORTS**

# REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING

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Vital Statistics				12/31/2019				12/31/2020				Services of Holy Communion										Marriages				Burials				Other Services				Spiritual Formation	
2020 Parochial Reports				Baptized Members		Baptized Members		Communion-icants		Baptisms		Confirmations		Sundays		Weekdays		Private		ASA		Online		Online		Online		Online		Online		Online		Online	
									Adults	Child	Adults	Child	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	Easter	Advent	
Athens, St. Matthias'		113	118	112	0	0	0	2	26	43	27	5	6	0	33	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	10	0	
Bonham, Holy Trinity		21	21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Canton, St. Justin the Martyr		72	71	68	0	0	0	0	0	0	0	0	6	0	32	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	0	
Cedar Hill, Good Shepherd		133	127	67	0	0	0	0	33	14	9	0	0	0	62	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	18	5	
Coppell, Apostles		549	548	460	0	0	0	0	33	46	3	2	2	0	153	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	40	12	
Corcoran, St. John's		330	325	244	2	2	0	0	76	41	40	40	872	0	111	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	75	20	
Dallas, Ascension		297	300	300	0	0	0	0	38	18	16	0	1	0	160	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	60	30	
Dallas, Christ		416	402	322	0	1	0	0	38	59	24	0	2	1	187	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	58	29	
Dallas, The Gathering		10	10	0	0	0	0	0	12	0	0	0	0	0	98	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Dallas, Good Samaritan		77	76	76	0	0	0	0	25	0	0	0	108	0	27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	10	0	
Dallas, Good Shepherd		1091	1095	616	3	2	1	14	82	41	18	46	37	0	274	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	157	0	162	
Dallas, Holy Cross		23	16	16	0	0	0	0	50	43	0	0	0	0	22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Dallas, Incarnation		4947	4992	3769	5	52	6	21	228	71	27	0	4829	0	1357	13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	350	0	
Dallas, Our Saviour		34	34	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Dallas, San Francisco		341	341	285	0	2	1	7	32	129	11	30	4	0	309	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Dallas, St. Augustine		187	181	115	0	0	0	0	47	2	6	0	8	0	88	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	7		
Dallas, St. Christopher's		75	73	73	0	1	0	0	37	0	9	0	1	0	29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Dallas, St. James'		457	465	465	0	2	1	1	0	0	0	0	0	0	198	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	0	
Dallas, St. John's		471	462	462	0	1	0	0	55	43	64	1	192	0	202	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Dallas, St. Luke's		204	209	209	0	0	0	0	90	52	71	0	13	0	115	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	75	30	
Dallas, St. Matthew's Cathedral		328	321	192	0	0	1	3	54	36	21	73	210	0	172	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	15	27		
Dallas, St. Michael & All Angels		6101	5944	5944	3	29	0	0	115	88	39	5	83	0	1266	14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1000	300	0	
Dallas, St. Philip's Sudanese		319	324	230	0	0	0	0	10	42	0	0	0	0	100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	40	0	
Dallas, St. Thomas'		372	376	150	1	0	2	0	20	42	5	7	0	0	75	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	35	0	0	
Dallas, Transfiguration		1179	1214	1214	4	4	0	0	45	8	22	0	11	0	564	6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	102	5	
Denison, St. Luke's		234	228	141	0	0	0	0	26	41	4	0	22	0	101	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14	61	0	
Denton, St. Barnabas'		308	306	212	0	0	0	0	79	40	37	0	0	0	66	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Denton, St. David of Wales		337	345	345	0	4	10	6	79	44	25	17	18	0	211	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
DeSoto, St. Anne		492	160	160	0	2	0	0	63	23	29	3	0	0	121	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Ennis, St. Thomas'		74	44	44	0	0	0	0	39	6	5	0	2	0	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Farmers Branch, St. Andrew's		194	193	74	0	0	0	0	50	42	13	7	0	0	47	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	13	3	0	
Flower Mound, St. Nicholas		664	664	420	0	0	0	0	110	0	6	0	25	0	147	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	50	0	0	
Frisco, St. Philip's		2021	1848	1848	0	4	0	0	20	43	2	0	0	0	482	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	433	534	0
Garland, Emmanuel Anglican		114	114	43	0	0	0	0	0	0	0	0	0	0	108	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Garland, Holy Trinity		182	156	156	0	0	0	0	86	86	4	4	0	0	106	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Garland, St. Barnabas'		716	722	441	0	11	0	0	72	44	112	104	80	0	277	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Greenville, St. Paul's		168	166	166	0	0	0	0	39	23	10	0	4	0	65	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Heath, Holy Trinity by the Lake		521	470	470	0	2	0	0	470	0	12	0	8	0	167	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	25	0	0	
Ivings, Redeemer		174	171	142	0	0	0	0	47	42	34	0	0	0	69	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	40	0	0	
Ivings, St. Mark's		146	144	121	0	0	0	0	58	57	43	2	2	0	83	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ivings, St. Mary's		319	319	0	0	2	0	0	39	19	0	0	0	0	82	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kaufman, Our Merciful Saviour		86	90	66	1	0	0	0	37	0	12	0	4	0	28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kemp, St. James'		98	94	94	0	0	0	0	66	1	13	0	54	0	59	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Lewis																																			



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Vital Statistics 2020 Parochial Reports		12/31/2019		12/31/2020		Services of Holy Communion										Marriages		Burials		Other Services		Spiritual Formation	
		Baptized Members	Baptized Members	Communi- cants	Baptisms		Confirmations		Sundays		Weekdays		Private										
					Adults	Child	Adults	Child	In person	Online	In person	Online	In person	Online	In person	Online							
		Adults	Child	Adults	Child	Adults	Child	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	In person	Online	Adults	Child		
Sherman, St. Stephen's	67	67	67	0	0	0	0	37	16	0	27	0	24	0	38	0	0	0	0	0	3	0	
Sulphur Springs St. Philip's	58	58	58	0	0	0	0	26	11	1	0	24	0	32	0	1	0	1	54	0	10	2	
Terrell, Good Shepherd	89	91	83	0	0	4	0	9	42	2	3	9	0	61	0	0	4	0	1	1	0	25	
TexasKano, St. James'	447	437	341	0	0	0	0	93	11	26	3	6	0	199	4	0	0	0	0	0	26	12	
Waxahachie, St. Paul	535	525	320	1	0	0	0	58	42	0	0	0	0	159	0	0	4	0	3	2	0	0	
Willsboro, St. Francis'	30	28	28	0	0	0	0	28	0	2	0	19	0	13	0	0	3	0	0	0	12	0	
Totals	30,295	29,377	24,760	22	136	46	57	3,300	2,016	1,006	502	7,355	4	10,329	63	0	254	11	507	4,858	0	3,670	1,753

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Financial Statistics 2020 Parochial Reports				Revenues			Expenses		
Pledging Units	Dollars Pledged	Plate & Pledge	Operating	Total		Assessment Paid	Non Operating		Total
				Operating	Non Operating		Operating	Non Operating	
Athens, St. Matthias'	28 \$ 79,510.00	\$ 86,691.00	\$ 107,607.00	\$ 200.00	\$ 107,807.00	\$ 9,864.00	\$ 120,825.00	\$ -	\$ 120,825.00
Bonham, Holy Trinity	0 \$ -	\$ -	\$ -	\$ -	\$ -	\$ 550.00	\$ -	\$ -	\$ -
Canton, St. Justin the Martyr	0 \$ -	\$ 42,858.00	\$ 42,858.00	\$ 6,685.00	\$ 49,543.00	\$ 550.00	\$ 38,228.00	\$ 4,876.00	\$ 43,104.00
Cedar Hill, Good Shepherd	32 \$ 157,636.00	\$ 165,937.00	\$ 167,775.00	\$ 10,978.00	\$ 178,753.00	\$ 23,881.00	\$ 178,197.00	\$ 7,798.00	\$ 185,995.00
Coppell, Apostles	40 \$ 226,800.00	\$ 433,451.00	\$ 477,126.00	\$ 101,763.00	\$ 578,889.00	\$ 39,464.00	\$ 433,451.00	\$ 77,639.00	\$ 511,090.00
Corsicana, St. John's	59 \$ 169,000.00	\$ 229,551.00	\$ 269,714.00	\$ 48,600.00	\$ 318,314.00	\$ 28,744.00	\$ 267,821.00	\$ 62,581.00	\$ 330,402.00
Dallas, Ascension	91 \$ 621,806.00	\$ 670,380.00	\$ 674,082.00	\$ 259,128.00	\$ 933,210.00	\$ 77,767.00	\$ 626,559.00	\$ 331,755.00	\$ 958,314.00
Dallas, Christ	55 \$ 136,404.00	\$ 115,968.00	\$ 251,910.00	\$ 264,528.00	\$ 516,438.00	\$ 30,232.00	\$ 261,390.00	\$ 17,588.00	\$ 278,978.00
Dallas, The Gathering	0 \$ -	\$ -	\$ 19,162.00	\$ -	\$ 19,162.00	\$ -	\$ 11,034.00	\$ -	\$ 11,034.00
Dallas, Good Samaritan	21 \$ 49,757.00	\$ 53,177.00	\$ 62,177.00	\$ 6,520.00	\$ 68,697.00	\$ 5,142.00	\$ 59,257.00	\$ 6,689.00	\$ 65,946.00
Dallas, Good Shepherd	224 \$ 1,435,288.00	\$ 1,192,160.00	\$ 1,424,497.00	\$ 620,049.00	\$ 2,044,546.00	\$ 148,350.00	\$ 1,424,398.00	\$ 64,791.00	\$ 1,489,189.00
Dallas, Holy Cross	15 \$ 20,000.00	\$ 29,482.00	\$ 79,182.00	\$ -	\$ 79,182.00	\$ 9,934.00	\$ 83,843.00	\$ -	\$ 83,843.00
Dallas, Incarnation	520 \$ 4,440,059.00	\$ 5,747,059.00	\$ 7,057,434.00	\$ 1,802,161.00	\$ 8,859,595.00	\$ 738,436.00	\$ 7,479,683.00	\$ 415,426.00	\$ 7,895,109.00
Dallas, Our Saviour	0 \$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Dallas, San Francisco	49 \$ 40,382.00	\$ 62,542.00	\$ 251,355.00	\$ 46,885.00	\$ 298,240.00	\$ 17,486.00	\$ 315,404.00	\$ 12,835.00	\$ 328,239.00
Dallas, St. Augustine	45 \$ 189,508.00	\$ 211,525.00	\$ 222,983.00	\$ 1,000.00	\$ 223,983.00	\$ 21,518.00	\$ 215,220.00	\$ 865.00	\$ 216,085.00
Dallas, St. Christopher's	0 \$ 96,630.00	\$ 94,566.00	\$ 122,566.00	\$ 103,027.00	\$ 225,593.00	\$ 308,943.00	\$ 308,943.00	\$ -	\$ 308,943.00
Dallas, St. James'	99 \$ 582,530.00	\$ 595,195.00	\$ 715,748.00	\$ 11,633.00	\$ 727,381.00	\$ 72,136.00	\$ 678,041.00	\$ 77,558.00	\$ 755,599.00
Dallas, St. John's	156 \$ 703,471.00	\$ 729,882.00	\$ 741,977.00	\$ 13,457.00	\$ 755,434.00	\$ 87,113.00	\$ 766,985.00	\$ 61,943.00	\$ 828,928.00
Dallas, St. Luke's	87 \$ 359,487.00	\$ 362,027.00	\$ 466,616.00	\$ 467,423.00	\$ 934,039.00	\$ 47,711.00	\$ 472,956.00	\$ 401,446.00	\$ 874,402.00
Dallas, St. Matthew's Cathedral	91 \$ 482,640.00	\$ 508,709.00	\$ 743,008.00	\$ 142,578.00	\$ 885,586.00	\$ 68,489.00	\$ 589,618.00	\$ 132,305.00	\$ 721,923.00
Dallas, St. Michael & All Angels	1062 \$ 6,048,221.00	\$ 5,982,053.00	\$ 6,624,558.00	\$ 1,470,209.00	\$ 8,094,767.00	\$ 660,260.00	\$ 6,605,212.00	\$ 1,139,882.00	\$ 7,745,094.00
Dallas, St. Philip's Sudanese	0 \$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Dallas, St. Thomas'	61 \$ 258,025.00	\$ 287,232.00	\$ 293,708.00	\$ 38,218.00	\$ 331,926.00	\$ 38,900.00	\$ 362,138.00	\$ 14,795.00	\$ 376,933.00
Dallas, Transfiguration	438 \$ 1,780,102.00	\$ 1,756,524.00	\$ 1,836,346.00	\$ 1,396,245.00	\$ 3,232,591.00	\$ 215,111.00	\$ 1,573,537.00	\$ 981,705.00	\$ 2,555,242.00
Denison, St. Luke's	42 \$ 96,000.00	\$ 101,951.00	\$ 246,185.00	\$ 21,917.00	\$ 268,102.00	\$ 26,249.00	\$ 299,822.00	\$ -	\$ 299,822.00
Denton, St. Barnabas'	46 \$ 135,396.00	\$ 143,577.00	\$ 210,206.00	\$ -	\$ 210,206.00	\$ 181,541.00	\$ 15,230.00	\$ 42,119.00	\$ 185,760.00
Denton, St. David of Wales	81 \$ 290,620.00	\$ 384,746.00	\$ 396,453.00	\$ 220,326.00	\$ 616,779.00	\$ 386,755.00	\$ 386,755.00	\$ 61,243.00	\$ 447,998.00
DeSoto, St. Anne	140 \$ 240,370.00	\$ 234,165.00	\$ 249,165.00	\$ -	\$ 249,165.00	\$ 35,646.00	\$ 266,638.00	\$ 113,065.00	\$ 379,703.00
Ennis, St. Thomas'	14 \$ 34,543.00	\$ 55,350.00	\$ 65,350.00	\$ -	\$ 65,350.00	\$ 6,794.00	\$ 60,095.00	\$ 10,000.00	\$ 70,095.00
Farmers Branch, St. Andrew's	28 \$ 75,794.00	\$ 94,224.00	\$ 118,224.00	\$ 33,457.00	\$ 151,681.00	\$ 10,511.00	\$ 151,572.00	\$ 4,172.00	\$ 155,744.00
Flower Mound, St. Nicholas	52 \$ 480,000.00	\$ 589,223.00	\$ 661,890.00	\$ 159,301.00	\$ 821,191.00	\$ 98,687.00	\$ 710,057.00	\$ 245,950.00	\$ 956,007.00
Frisco, St. Philip's	153 \$ 988,239.00	\$ 1,435,595.00	\$ 1,920,043.00	\$ 212,052.00	\$ 2,132,095.00	\$ 146,749.00	\$ 1,663,345.00	\$ 295,216.00	\$ 1,958,561.00
Garland, Emmanuel Anglican	43 \$ 44,770.00	\$ 47,772.00	\$ 140,391.00	\$ 273.00	\$ 140,664.00	\$ 3,670.00	\$ 138,566.00	\$ 454.00	\$ 139,020.00
Garland, Holy Trinity	51 \$ 191,520.00	\$ 203,738.00	\$ 205,538.00	\$ 24,304.00	\$ 229,842.00	\$ 25,124.00	\$ 222,572.00	\$ 12,859.00	\$ 235,431.00
Garland, St. Barnabas'	51 \$ 151,888.00	\$ 147,731.00	\$ 245,362.00	\$ 60,866.00	\$ 306,228.00	\$ 20,808.00	\$ 239,761.00	\$ 503.00	\$ 240,264.00
Greenville, St. Paul's	38 \$ 163,175.00	\$ 185,944.00	\$ 196,009.00	\$ 44,922.00	\$ 240,931.00	\$ 18,053.00	\$ 196,755.00	\$ -	\$ 196,755.00
Heath, Holy Trinity by the Lake	120 \$ 534,867.00	\$ 530,578.00	\$ 603,578.00	\$ 109,955.00	\$ 713,533.00	\$ 55,477.00	\$ 602,269.00	\$ 119,455.00	\$ 721,724.00
Irving, Redeemer	58 \$ 199,406.00	\$ 207,043.00	\$ 209,453.00	\$ -	\$ 209,453.00	\$ 25,384.00	\$ 209,894.00	\$ 100,358.00	\$ 310,252.00
Irving, St. Mark's	58 \$ 250,522.00	\$ 292,927.00	\$ 331,713.00	\$ 60,560.00	\$ 392,273.00	\$ 29,046.00	\$ 289,582.00	\$ 38,893.00	\$ 328,475.00
Irving, St. Mary's	25 \$ 39,840.00	\$ 34,321.00	\$ 109,321.00	\$ -	\$ 109,321.00	\$ 5,485.00	\$ 107,655.00	\$ -	\$ 107,655.00
Kaufman, Our Merciful Saviour	14 \$ 48,160.00	\$ 68,110.00	\$ 76,935.00	\$ 720.00	\$ 77,655.00	\$ 5,540.00	\$ 64,349.00	\$ 289.00	\$ 64,638.00
Kemp, St. James'	0 \$ -	\$ 145,795.00	\$ 145,795.00	\$ 18,601.00	\$ 164,396.00	\$ 15,688.00	\$ 135,722.00	\$ 12,243.00	\$ 147,965.00
Lewisville, Annunciation	112 \$ 420,756.00	\$ 451,247.00	\$ 473,403.00	\$ 33,104.00	\$ 506,507.00	\$ 51,342.00	\$ 498,534.00	\$ 103,669.00	\$ 602,203.00
McKinney, Holy Family	0 \$ -	\$ 25,429.00	\$ 25,429.00	\$ -	\$ 25,429.00	\$ 1,927.00	\$ 23,529.00	\$ -	\$ 23,529.00
McKinney, St. Andrew's	132 \$ 521,460.00	\$ 549,724.00	\$ 561,049.00	\$ 223,338.00	\$ 784,387.00	\$ 56,198.00	\$ 585,874.00	\$ 182,053.00	\$ 767,927.00

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

Financial Statistics				Revenues				Expenses									
2020 Parochial Reports				Operating		Non Operating		Total		Operating		Assessment Paid		Non Operating		Total	
	Pledging Units	Dollars Pledged	Plate & Pledge	Operating	Non Operating	Operating	Non Operating	Operating	Non Operating	Operating	Assessment Paid	Non Operating	Operating	Assessment Paid	Non Operating	Operating	Total
	184	\$ 706,358.00	\$ 705,763.00	\$ 751,739.00	\$ 347,603.00	\$ 1,099,342.00	\$ 811,243.00	\$ 61,427.00	\$ 333,207.00	\$ 1,144,450.00							
McKinney, St. Peter's	35	\$ 216,735.00	\$ 259,120.00	\$ 295,120.00	\$ -	\$ 295,120.00	\$ 259,120.00	\$ 17,881.00	\$ -	\$ 259,120.00							
Mineola, St. Dunstan's																	
Mt Pleasant, St. Mark's	6	\$ 14,040.00	\$ 32,017.00	\$ 103,562.00	\$ -	\$ 103,562.00	\$ 103,746.00	\$ 12,898.00	\$ -	\$ 103,746.00							
Paris, Holy Cross	43	\$ 200,000.00	\$ 196,074.00	\$ 230,374.00	\$ 114,382.00	\$ 344,756.00	\$ 278,987.00	\$ 27,066.00	\$ 15,827.00	\$ 294,814.00							
Pittsburg, St. William Laud	23	\$ 57,660.00	\$ 82,101.00	\$ 82,101.00	\$ -	\$ 82,101.00	\$ 84,156.00	\$ 10,583.00	\$ -	\$ 84,156.00							
Plano, Holy Nativity	0	\$ -	\$ 128,946.00	\$ 250,865.00	\$ 12,000.00	\$ 262,865.00	\$ 289,497.00	\$ 19,019.00	\$ 7,017.00	\$ 296,514.00							
Plano, Resurrection	20	\$ 107,080.00	\$ 117,000.00	\$ 157,000.00	\$ -	\$ 157,000.00	\$ 234,840.00	\$ 4,966.00	\$ -	\$ 234,840.00							
Plano, Santa Natividad	82	\$ 80,000.00	\$ 46,943.00	\$ 144,943.00	\$ -	\$ 144,943.00	\$ 161,732.00	\$ 3,119.00	\$ -	\$ 161,732.00							
Pottsboro, St. John the Apostle	39	\$ 128,700.00	\$ 134,729.00	\$ 146,122.00	\$ 3,916.00	\$ 150,038.00	\$ 130,947.00	\$ 14,317.00	\$ 2,096.00	\$ 133,043.00							
Prosper, St. Paul's	75	\$ 320,108.00	\$ 239,068.00	\$ 337,068.00	\$ -	\$ 337,068.00	\$ 279,666.00	\$ 41,130.00	\$ -	\$ 279,666.00							
Richardson, Epiphany	185	\$ 901,384.00	\$ 958,359.00	\$ 970,165.00	\$ 166,026.00	\$ 1,136,191.00	\$ 824,380.00	\$ 90,688.00	\$ 207,652.00	\$ 1,032,032.00							
Sherman, St. Stephen's	22	\$ 53,438.00	\$ 111,734.00	\$ 141,734.00	\$ 125,000.00	\$ 266,734.00	\$ 216,362.00	\$ 15,287.00	\$ 61,491.00	\$ 277,853.00							
Sulphur Springs, St. Philip's	19	\$ 50,740.00	\$ 67,348.00	\$ 67,392.00	\$ 39,516.00	\$ 106,908.00	\$ 58,915.00	\$ 5,671.00	\$ 42,522.00	\$ 101,437.00							
Terrell, Good Shepherd	48	\$ 183,350.00	\$ 190,465.00	\$ 213,577.00	\$ 60,785.00	\$ 274,362.00	\$ 210,582.00	\$ 18,822.00	\$ 24,614.00	\$ 235,196.00							
Texarkana, St. James'	102	\$ 421,050.00	\$ 451,287.00	\$ 469,212.00	\$ -	\$ 469,212.00	\$ 496,181.00	\$ 51,306.00	\$ -	\$ 496,181.00							
Waxahachie, St. Paul	91	\$ 306,884.00	\$ 317,333.00	\$ 397,853.00	\$ 100,000.00	\$ 497,853.00	\$ 385,275.00	\$ 37,908.00	\$ -	\$ 385,275.00							
Winnboro, St. Francis	0	\$ -	\$ 18,739.00	\$ 18,739.00	\$ 888.00	\$ 19,627.00	\$ 11,165.00	\$ 550.00	\$ 9,572.00	\$ 20,737.00							
Totals	5,405	\$ 26,532,109.00	\$ 29,343,185.00	\$ 34,621,447.00	\$ 9,005,099.00	\$ 43,626,546.00	\$ 34,744,421.00	\$ 3,474,747.00	\$ 5,821,116.00	\$ 40,565,537.00							

2020  
**Financials**  
Operating Account Balance Sheet p. 30  
Operating Account Income and Expense p. 31

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

EPISCOPAL DIOCESE OF DALLAS  
OPERATING ACCOUNT BALANCE SHEET  
December 2020

**Assets**

**Cash**

1-10600-10 - Petty Cash	\$425.00
1-11285-10 - Pegasus Bank MM	\$754,366.14
1-11286-10 - Pegasus MM-PPP loan proceeds	\$249,900.00
1-11288-10 - Pegasus Bank CK	\$12,143.88
1-11290-10 - American National Bank	\$115,940.86

**Total Cash** **\$1,132,775.88**

**Property and Equipment**

1-25900-10 - NW McKinney Property	\$252,762.43
1-25997-10 - Buildings	\$57,775.00
1-25998-10 - Furniture and Equipment	\$306,470.00

**Total Property and Equipment** **\$617,007.43**

**Accumulated Depreciation**

1-25999-10 - Accumulated Depreciation	(\$259,775.19)
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**Total Accumulated Depreciation** **(\$259,775.19)**

**Accounts Receivable**

1-23662-10 - 2021 Prepaid Expenses	\$5,097.50
1-23749-10 - Diocesan Worker's Comp Insurance	(\$1,694.74)
1-23750-10 - Diocesan Life & Dental Insurance	\$3,444.36

**Total Accounts Receivable** **\$6,847.12**

**Total Assets** **\$1,496,855.24**

**Liabilities, Fund Principal, & Restricted Funds**

**Liabilities**

**Accounts Payable**

2-31050-10 - Miscellaneous Items Payable	\$1,357.27
2-31094-10 - 2021 Assessment Payable	\$2,058.51
2-31671-10 - SBA PPP Loan	\$249,900.00
2-50001-10 - Postretirement Benefit Liabilities	\$665,960.00

**Total Accounts Payable** **\$919,275.78**

**Executive Council Restricted**

8-31230-10 - Clergy Support & Dev Reserve	\$112,603.77
8-31240-10 - NW McKinney Property Reserve	\$252,762.43
8-31270-10 - Theological Development Reserve	\$37,413.23
8-31300-10 - TEC Participation Reserve	\$46,366.81
8-31500-10 - Operating Reserve	\$284,995.78
8-31550-10 - Legal Compliance Reserve	\$16,961.67
8-31620-10 - Cong Support & Dev Reserve	\$184,774.46
8-31640-10 - New Church Plant Reserve	\$3,000.00

**Total Executive Council Restricted** **\$938,878.15**

**Total Liabilities** **\$1,858,153.93**

**Fund Principal**

2-99996-10 - Accumulated-Other Comp Net Inc	(\$290,597.00)
2-99999-10 - Fund Balance	(\$70,878.90)
Net Income/(Loss)	\$177.21

**Total Fund Principal and Net Income/(Loss)** **(\$361,298.69)**

**Total Liabilities, Fund Principal, & Restricted Funds** **\$1,496,855.24**

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

EPISCOPAL DIOCESE OF DALLAS  
OPERATING STATEMENT OF ACTIVITIES  
December 2020

	YTD Actual	YTD Budget	YTD Budget/Actual	Variance	Annual Budget	Footnotes Referenced
<b>DIOCESAN REVENUES</b>						
Endowment of the Episcopate	\$95,000.00	\$95,000.00	\$0.00	0.00%	\$95,000.00	
E.D. Farmer Grant	\$60,000.00	\$60,000.00	\$0.00	0.00%	\$60,000.00	
Theological Training Grant	\$150,000.00	\$150,000.00	\$0.00	0.00%	\$150,000.00	
Episcopal Health Foundation	\$70,000.00	\$70,000.00	\$0.00	0.00%	\$70,000.00	
Allowance-Uncollected Assessments	\$0.00	(\$110,536.61)	\$110,536.61	100.00%	(\$110,536.61)	
Other Revenue	\$2,405.00	\$2,400.00	\$5.00	-0.21%	\$2,400.00	
Interest Income	\$764.63	\$2,000.00	(\$1,235.37)	61.77%	\$2,000.00	
Prior Year Assessment Revenue	\$17,212.81	\$0.00	\$17,212.81	0.00%	\$0.00	
<b>Assessment Balances</b>						
Allen, Savior	\$516.75	\$517.00	(\$0.25)	0.05%	\$517.00	1
Athens, St. Matthias	\$9,864.25	\$9,864.00	\$0.25	0.00%	\$9,864.00	
Bonham, Holy Trinity	\$550.00	\$550.00	\$0.00	0.00%	\$550.00	
Canton, St. Justin Martyr	\$550.00	\$550.00	\$0.00	0.00%	\$550.00	
Cedar Hill, Good Shepherd	\$23,881.00	\$23,881.00	\$0.00	0.00%	\$23,881.00	
Corsicana, St. John's	\$28,743.88	\$28,744.00	(\$0.12)	0.00%	\$28,744.00	
Coppell, Apostles	\$39,464.37	\$39,464.00	\$0.37	0.00%	\$39,464.00	
Dallas, Ascension	\$77,767.25	\$77,767.00	\$0.25	0.00%	\$77,767.00	
Dallas, Christ Church	\$30,231.63	\$30,232.00	(\$0.37)	0.00%	\$30,232.00	
Garland, Emmanuel Anglican	\$3,670.37	\$3,670.00	\$0.37	-0.01%	\$3,670.00	
Dallas, Good Samaritan	\$5,142.00	\$5,142.00	\$0.00	0.00%	\$5,142.00	
Dallas, Good Shepherd	\$148,349.63	\$148,350.00	(\$0.37)	0.00%	\$148,350.00	
Dallas, Holy Cross	\$9,933.88	\$9,934.00	(\$0.12)	0.00%	\$9,934.00	
Dallas, Holy Faith	\$350.00	\$550.00	(\$200.00)	36.36%	\$550.00	
Dallas, Incarnation	\$738,436.38	\$738,436.00	\$0.38	0.00%	\$738,436.00	
Dallas, Our Saviour	\$0.00	\$2,421.00	(\$2,421.00)	100.00%	\$2,421.00	
Dallas, San Francisco De Asis	\$17,486.37	\$17,486.00	\$0.37	0.00%	\$17,486.00	
Dallas, St. Christopher's	\$16,499.12	\$16,499.00	\$0.12	0.00%	\$16,499.00	
Dallas, St. James	\$72,136.13	\$72,136.00	\$0.13	0.00%	\$72,136.00	
Dallas, St. John's	\$87,112.63	\$87,113.00	(\$0.37)	0.00%	\$87,113.00	
Dallas, St. Luke's	\$47,710.63	\$47,711.00	(\$0.37)	0.00%	\$47,711.00	
Dallas, St. Matthew's Cathedral	\$68,488.75	\$68,489.00	(\$0.25)	0.00%	\$68,489.00	2
Dallas, St. Michael & All Angels	\$660,260.37	\$660,260.00	\$0.37	0.00%	\$660,260.00	
Dallas, St. Augustine's	\$21,596.63	\$21,597.00	(\$0.37)	0.00%	\$21,597.00	
Dallas, St. Thomas the Apostle	\$38,899.63	\$38,900.00	(\$0.37)	0.00%	\$38,900.00	
Dallas, Transfiguration	\$215,111.38	\$215,111.00	\$0.38	0.00%	\$215,111.00	
Denison, St. Luke's	\$26,429.33	\$26,429.00	\$0.33	0.00%	\$26,429.00	
Denton, St. Barnabas	\$15,230.38	\$15,230.00	\$0.38	0.00%	\$15,230.00	
Denton, St. David of Wales	\$30,364.62	\$30,365.00	(\$0.38)	0.00%	\$30,365.00	
DeSoto, St. Anne	\$35,645.50	\$35,646.00	(\$0.50)	0.00%	\$35,646.00	
Ennis, St. Thomas	\$6,794.37	\$6,794.00	\$0.37	-0.01%	\$6,794.00	
Farmers Branch, St. Andrew's	\$10,511.38	\$10,511.00	\$0.38	0.00%	\$10,511.00	
Flower Mound, St. Nicholas	\$98,687.38	\$98,687.00	\$0.38	0.00%	\$98,687.00	
Frisco, St. Philip's	\$146,749.13	\$146,749.00	\$0.13	0.00%	\$146,749.00	3
Garland, Holy Trinity	\$25,124.00	\$25,124.00	\$0.00	0.00%	\$25,124.00	
Garland, St. Barnabas	\$20,808.37	\$20,808.00	\$0.37	0.00%	\$20,808.00	
Greenville, St. Paul's	\$18,052.87	\$18,053.00	(\$0.13)	0.00%	\$18,053.00	
Irving, Redeemer	\$25,384.00	\$25,384.00	\$0.00	0.00%	\$25,384.00	
Irving, St. Mark's	\$29,045.50	\$29,046.00	(\$0.50)	0.00%	\$29,046.00	
Irving, St. Mary's	\$5,485.37	\$5,485.00	\$0.37	-0.01%	\$5,485.00	
Kaufman, Our Merciful Saviour	\$5,540.37	\$5,540.00	\$0.37	-0.01%	\$5,540.00	
Kemp, St. James	\$15,687.87	\$15,688.00	(\$0.13)	0.00%	\$15,688.00	
Lewisville, Annunciation	\$51,341.62	\$51,342.00	(\$0.38)	0.00%	\$51,342.00	

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

OPERATING STATEMENT OF ACTIVITIES  
December 2020

	YTD Actual	YTD Budget	YTD Budget/Actual	Variance	Annual Budget	Footnotes Referenced
<b>Assessment Balances (continued)</b>						
McKinney, Holy Family	\$1,926.98	\$2,332.00	(\$405.02)	17.37%	\$2,332.00	
McKinney, St. Andrew's	\$56,198.12	\$56,198.00	\$0.12	0.00%	\$56,198.00	
McKinney, St. Peter's	\$61,426.75	\$61,427.00	(\$0.25)	0.00%	\$61,427.00	
Mineola, St. Dunstan's	\$17,880.96	\$16,391.00	\$1,489.96	-9.09%	\$16,391.00	
Mt. Pleasant, St. Mark's	\$12,897.50	\$12,898.00	(\$0.50)	0.00%	\$12,898.00	
Paris, Holy Cross	\$27,065.50	\$27,066.00	(\$0.50)	0.00%	\$27,066.00	
Pittsburg, St. William Laud	\$10,582.88	\$10,583.00	(\$0.12)	0.00%	\$10,583.00	
Plano, Holy Nativity	\$19,019.00	\$19,019.00	\$0.00	0.00%	\$19,019.00	4
Pottsboro, St. John the Apostle	\$14,316.50	\$14,317.00	(\$0.50)	0.00%	\$14,317.00	
Prosper, St. Paul's	\$41,129.88	\$41,130.00	(\$0.12)	0.00%	\$41,130.00	
Plano, Resurrection	\$4,966.28	\$4,967.00	(\$0.72)	0.01%	\$4,967.00	
Plano, Santa Natividad	\$2,835.80	\$3,119.00	(\$283.20)	9.08%	\$3,119.00	
Richardson, Epiphany	\$90,687.63	\$90,688.00	(\$0.37)	0.00%	\$90,688.00	
Health/Rockwall, Holy Trinity	\$55,476.63	\$55,477.00	(\$0.37)	0.00%	\$55,477.00	
Sherman, St. Stephen's	\$15,287.25	\$15,287.00	\$0.25	0.00%	\$15,287.00	
Sulphur Springs, St. Philip's	\$5,671.38	\$5,671.00	\$0.38	-0.01%	\$5,671.00	
Terrell, Good Shepherd	\$18,821.88	\$18,822.00	(\$0.12)	0.00%	\$18,822.00	
Texarkana, St. James	\$51,305.87	\$51,306.00	(\$0.13)	0.00%	\$51,306.00	
Waxahachie, St. Paul	\$37,907.87	\$37,908.00	(\$0.13)	0.00%	\$37,908.00	
Winnsboro, St. Francis	\$550.00	\$550.00	\$0.00	0.00%	\$550.00	
<b>Total Assessment Balances</b>	<b>\$3,475,589.75</b>	<b>\$3,477,411.00</b>	<b>(\$1,821.25)</b>	<b>0.05%</b>	<b>\$3,477,411.00</b>	
<b>Total DIOCESAN REVENUES</b>	<b>\$3,870,972.19</b>	<b>\$3,746,274.39</b>	<b>\$124,697.80</b>	<b>-3.33%</b>	<b>\$3,746,274.39</b>	

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

OPERATING STATEMENT OF ACTIVITIES  
December 2020

	YTD Actual	YTD Budget	YTD Budget/Actual	Variance	Annual Budget	Footnotes Referenced
<b>DIOCESAN EXPENSES</b>						
<b>Congregational Support &amp; Development</b>						
Congregational Developmt Administrative Expenses	\$5,767.00	\$5,000.00	(\$767.00)	-15.34%	\$5,000.00	
Stewardship & Development Department	\$16,537.04	\$18,000.00	\$1,462.96	8.13%	\$18,000.00	
San Francisco de Asis, Dallas	\$102,499.96	\$100,000.00	(\$2,499.96)	-2.50%	\$100,000.00	
St. Paul, Waxahachie	\$18,000.00	\$18,000.00	\$0.00	0.00%	\$18,000.00	
St. Christopher's, Dallas	\$27,999.96	\$28,000.00	\$0.04	0.00%	\$28,000.00	
Our Merciful Saviour, Kaufman	\$7,500.00	\$7,500.00	\$0.00	0.00%	\$7,500.00	
St. Augustine's, Dallas	\$12,500.04	\$12,500.00	(\$0.04)	0.00%	\$12,500.00	
St. Matthias, Athens	\$17,499.96	\$17,500.00	\$0.04	0.00%	\$17,500.00	
The Gathering, Dallas	\$12,500.04	\$12,500.00	(\$0.04)	0.00%	\$12,500.00	
Congregational Development Contingency Fund	\$7,971.92	\$18,272.00	\$10,300.08	56.37%	\$18,272.00	
Clergy Coaching	\$6,000.00	\$6,000.00	\$0.00	0.00%	\$6,000.00	
St. Barnabas, Garland	\$95,000.04	\$95,000.00	(\$0.04)	0.00%	\$95,000.00	
St. Mary's, Irving	\$67,500.00	\$67,500.00	\$0.00	0.00%	\$67,500.00	
Emmanuel Anglican, Garland	\$70,596.12	\$70,000.00	(\$596.12)	-0.85%	\$70,000.00	
St. Andrew's, Farmers Branch	\$24,000.00	\$24,000.00	\$0.00	0.00%	\$24,000.00	
St. Dunstan's, Mineola	\$36,000.00	\$36,000.00	\$0.00	0.00%	\$36,000.00	
Santa Natividad, Plano	\$80,000.04	\$80,000.00	(\$0.04)	0.00%	\$80,000.00	
St. James, Dallas	\$40,000.00	\$40,000.00	\$0.00	0.00%	\$40,000.00	
<b>Total Congregational Support &amp; Development</b>	<b>\$647,872.12</b>	<b>\$655,772.00</b>	<b>\$7,899.88</b>	<b>1.20%</b>	<b>\$655,772.00</b>	
<b>Church Plants</b>						
Church Plant Administrative Expense	\$8,469.02	\$10,000.00	\$1,530.98	15.31%	\$10,000.00	
Holy Faith, Dallas	\$11,499.02	\$15,000.00	\$3,500.98	23.34%	\$15,000.00	
New Church Plants Contingency Fund	\$0.00	\$5,000.00	\$5,000.00	100.00%	\$5,000.00	
Resurrection, Plano	\$41,540.71	\$40,000.00	(\$1,540.71)	-3.85%	\$40,000.00	
San Marcos, Mt. Pleasant	\$39,999.96	\$40,000.00	\$0.04	0.00%	\$40,000.00	
St. Philip's Sudanese, Dallas	\$48,072.00	\$39,500.00	(\$8,572.00)	-21.70%	\$39,500.00	
New Satellite	\$68,571.48	\$68,000.00	(\$571.48)	-0.84%	\$68,000.00	
Grace Community, Dallas	\$79,916.16	\$82,000.00	\$2,083.84	2.54%	\$82,000.00	
<b>Total Church Plants</b>	<b>\$298,068.35</b>	<b>\$299,500.00</b>	<b>\$1,431.65</b>	<b>0.48%</b>	<b>\$299,500.00</b>	
<b>Clergy Development &amp; Support</b>						
Stanton Center for Ministry Formation	\$19,741.56	\$38,500.00	\$18,758.44	48.72%	\$38,500.00	
Vocations Expenses	\$14,125.77	\$20,000.00	\$5,874.23	29.37%	\$20,000.00	
Commission on Ministry Expenses	\$2,030.83	\$11,000.00	\$8,969.17	81.54%	\$11,000.00	
Curacy Training	\$178,165.22	\$165,000.00	(\$13,165.22)	-7.98%	\$165,000.00	
College of Deacons	\$1,634.81	\$4,500.00	\$2,865.19	63.67%	\$4,500.00	
Seminarian Support	\$117,041.23	\$100,000.00	(\$17,041.23)	-17.04%	\$100,000.00	
Clergy Conferences	\$2,095.29	\$20,000.00	\$17,904.71	89.52%	\$20,000.00	
Rural Church Ministry Commission	\$1,045.75	\$1,500.00	\$454.25	30.28%	\$1,500.00	
Clergy Family Commission	\$2,814.79	\$5,000.00	\$2,185.21	43.70%	\$5,000.00	
Clergy Recruiting	\$36.39	\$0.00	(\$36.39)	0.00%	\$0.00	
<b>Total Clergy Development &amp; Support</b>	<b>\$338,731.64</b>	<b>\$365,500.00</b>	<b>\$26,768.36</b>	<b>7.32%</b>	<b>\$365,500.00</b>	
<b>Theological Development &amp; Special Ministry</b>						
Canon Theologian (Hylden)	\$79,546.80	\$77,000.00	(\$2,546.80)	-3.31%	\$77,000.00	
Theologian-in-Residence (Austin)	\$23,474.77	\$26,000.00	\$2,525.23	9.71%	\$26,000.00	
Christian Formation Commission	\$7,210.91	\$10,000.00	\$2,789.09	27.89%	\$10,000.00	
Canon Pastor	\$22,598.82	\$25,600.00	\$3,001.18	11.72%	\$25,600.00	
Canon for Rural Ministries	\$3,472.22	\$3,200.00	(\$272.22)	-8.51%	\$3,200.00	
<b>Total Theological Development &amp; Special Ministry</b>	<b>\$136,303.52</b>	<b>\$141,800.00</b>	<b>\$5,496.48</b>	<b>3.88%</b>	<b>\$141,800.00</b>	
<b>Evangelism</b>						
Canon Evangelist	\$53,552.87	\$52,850.00	(\$702.87)	-1.33%	\$52,850.00	
Evangelism Commission	\$10,452.55	\$20,000.00	\$9,547.45	47.74%	\$20,000.00	
<b>Total Evangelism</b>	<b>\$64,005.42</b>	<b>\$72,850.00</b>	<b>\$8,844.58</b>	<b>12.14%</b>	<b>\$72,850.00</b>	



REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

OPERATING STATEMENT OF ACTIVITIES

December 2020

	YTD Actual	YTD Budget	YTD Budget/Actual	Variance	Annual Budget	Footnotes Referenced
<b>Youth Ministry</b>						
Youth Missioner	\$3,270.00	\$4,000.00	\$730.00	18.25%	\$4,000.00	
Diocesan Youth Commission	\$235.00	\$12,000.00	\$11,765.00	98.04%	\$12,000.00	
<b>Total Youth Ministry</b>	\$3,505.00	\$16,000.00	\$12,495.00	78.09%	\$16,000.00	
<b>College Ministries</b>						
College Ministry Program Expenses	\$844.11	\$6,000.00	\$5,155.89	85.93%	\$6,000.00	
<b>Total College Ministries</b>	\$844.11	\$6,000.00	\$5,155.89	85.93%	\$6,000.00	
<b>Diocesan Institutions</b>						
Camp All Saints	\$255,000.00	\$160,000.00	(\$95,000.00)	-59.38%	\$160,000.00	
Holy Family School, McKinney	\$6,000.00	\$6,000.00	\$0.00	0.00%	\$6,000.00	
<b>Total Diocesan Ministries</b>	\$261,000.00	\$166,000.00	(\$95,000.00)	-57.23%	\$166,000.00	
<b>Episcopal Church Ministries</b>						
Support for the Budget of the General Convention	\$463,878.00	\$463,878.00	\$0.00	0.00%	\$463,878.00	
Provincial Synod Assessment	\$4,598.00	\$5,000.00	\$402.00	8.04%	\$5,000.00	
General Convention 2021	\$20,000.04	\$20,000.00	(\$0.04)	0.00%	\$20,000.00	
Episcopal Relief & Development (ERD)	\$0.00	\$600.00	\$600.00	100.00%	\$600.00	
<b>Total Episcopal Church Ministries</b>	\$488,476.04	\$489,478.00	\$1,001.96	0.20%	\$489,478.00	
<b>Ecumenical &amp; Diocesan Commitments</b>						
University of the South Ownership Apportion	\$999.96	\$1,000.00	\$0.04	0.00%	\$1,000.00	
Retiree Benefits	\$40,965.91	\$47,700.00	\$6,734.09	14.12%	\$47,700.00	
Annual Diocesan Convention	\$24,096.98	\$30,000.00	\$5,903.02	19.68%	\$30,000.00	
<b>Total Ecumenical &amp; Diocesan Commitments</b>	\$66,062.85	\$78,700.00	\$12,637.15	16.06%	\$78,700.00	
<b>Office of the Episcopate</b>						
Bishop Compensation & Benefits	\$263,867.60	\$264,700.00	\$832.40	0.31%	\$264,700.00	
Assisting Bishop Compensation & Expenses	\$46,056.67	\$45,000.00	(\$1,056.67)	-2.35%	\$45,000.00	
Canon to the Ordinary Compensation & Benefits	\$106,872.10	\$106,274.39	(\$597.71)	-0.56%	\$106,274.39	
Episcopate Travel & Meetings	\$40,620.08	\$45,000.00	\$4,379.92	9.73%	\$45,000.00	
Immigration Expense	\$26,495.45	\$15,000.00	(\$11,495.45)	-76.64%	\$15,000.00	
<b>Total Office of the Episcopate</b>	\$483,911.90	\$475,974.39	(\$7,937.51)	-1.67%	\$475,974.39	
<b>Diocesan Staff</b>						
Staff Travel & Diocesan Meetings	\$5,086.61	\$10,000.00	\$4,913.39	49.13%	\$10,000.00	
Social Security (FICA)	\$31,121.05	\$30,730.00	(\$391.05)	-1.27%	\$30,730.00	
Administrative Compensation	\$406,553.01	\$401,700.00	(\$4,853.01)	-1.21%	\$401,700.00	
Staff Group Health Insurance	\$129,517.82	\$135,500.00	\$5,982.18	4.41%	\$135,500.00	
Staff Pension Contribution	\$39,675.93	\$40,170.00	\$494.07	1.23%	\$40,170.00	
Communications Compensation & Expenses	\$115,843.51	\$131,600.00	\$15,756.49	11.97%	\$131,600.00	
<b>Total Diocesan Staff</b>	\$727,797.93	\$749,700.00	\$21,902.07	2.92%	\$749,700.00	
<b>Diocesan House Expenses</b>						
Insurance-Prop/Liab/WC	\$44,407.89	\$40,000.00	(\$4,407.89)	-11.02%	\$40,000.00	
Janitor Service & Supply	\$8,340.31	\$10,000.00	\$1,659.69	16.60%	\$10,000.00	
Maintenance-Building & Grounds	\$24,013.73	\$25,000.00	\$986.27	3.95%	\$25,000.00	
Utilities	\$20,925.58	\$30,000.00	\$9,074.42	30.25%	\$30,000.00	
New Equipment & Maintenance	\$17,703.83	\$15,000.00	(\$2,703.83)	-18.03%	\$15,000.00	
Postage	\$6,010.25	\$8,000.00	\$1,989.75	24.87%	\$8,000.00	
Office Supplies & Printing	\$12,667.88	\$20,000.00	\$7,332.12	36.66%	\$20,000.00	
Annual Audit	\$43,250.00	\$45,000.00	\$1,750.00	3.89%	\$45,000.00	
Bank Service Charges	\$1,105.65	\$1,000.00	(\$105.65)	-10.56%	\$1,000.00	
Information Tech & Data Publishing	\$25,887.37	\$35,000.00	\$9,112.63	26.04%	\$35,000.00	
<b>Total Diocesan House Expenses</b>	\$204,312.49	\$229,000.00	\$24,687.51	10.78%	\$229,000.00	
<b>Total DIOCESAN EXPENSES</b>	\$3,720,891.37	\$3,746,274.39	\$25,383.02	0.68%	\$3,746,274.39	
<b>Net Total</b>	\$150,080.82	\$0.00	\$150,080.82	0.00%	\$0.00	

REPORTS TO THE 126<sup>th</sup> ANNUAL MEETING  
Saturday, November 6, 2021

OPERATING STATEMENT OF ACTIVITIES  
December 2020

	YTD Actual	YTD Budget	YTD Budget/Actual	Variance	Annual Budget	Footnotes Referenced
<b>Other Expenses</b>						
Depreciation Expense	\$14,903.61	\$0.00	(\$14,903.61)	0.00%	\$0.00	
RRB transfer to reserve	\$135,000.00	\$0.00	(\$135,000.00)	0.00%	\$0.00	
<b>Total Other Expenses</b>	\$149,903.61	\$0.00	(\$149,903.61)	0.00%	\$0.00	
<b>Net Operating Total</b>	\$177.21	\$0.00	\$177.21	0.00%	\$0.00	

**Footnotes**

**1** Church of the Savior (Allen) assessment adjustment (due to closure) to \$517; approved by Finance Committee & Executive Council 02/11/2020

**2** St. Matthew's Cathedral assessment corrected to \$74,715; approved by Finance Committee & Executive Council 12/10/2019

**3** St. Philip's (Frisco) assessment adjusted to \$160,090; approved by Finance Committee 03/10/2020 & Executive Council 04/14/2020

**4** Holy Nativity's (Plano) assessment corrected & adjusted to \$20,748; approved by Finance Committee 03/10/2020 & Executive Council 04/14/2020

# Independent Auditor's Report



REPORT OF INDEPENDENT AUDITORS  
AND CONSOLIDATED FINANCIAL STATEMENTS  
WITH SUPPLEMENTARY INFORMATION

**EPISCOPAL DIOCESE OF DALLAS  
OF THE PROTESTANT EPISCOPAL CHURCH**

December 31, 2020 and 2019

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**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Consolidated Statements of Financial Position**

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**ASSETS**

	December 31,	
	2020	2019
Cash and cash equivalents	\$ 1,562,348	\$ 1,074,386
Investments	6,951,286	6,389,130
Inventories	6,529	6,529
Assessment receivable	-	124,702
Other receivables	2,018	11,956
Note receivable, related party	-	5,260
Property and equipment, net	4,161,358	4,339,585
Land held for future parish development	252,764	252,764
Other assets	6,848	18,560
	<u>6,848</u>	<u>18,560</u>
Total assets	<u>\$ 12,943,151</u>	<u>\$ 12,222,872</u>

**LIABILITIES AND NET ASSETS**

**LIABILITIES**

Accounts payable	\$ 3,416	\$ 48,943
Account payable, related party	43,389	-
Deferred revenue from programs	65,698	75,917
Postretirement benefit obligation	645,828	665,960
Note payable, related party	1,153,100	1,153,100
Note payable, paycheck protection program	350,300	-
Total liabilities	<u>2,261,731</u>	<u>1,943,920</u>

**NET ASSETS**

Without donor restrictions		
Undesignated	2,396,127	2,643,686
Board designed endowment fund, Endowment of the Episcopate	2,648,003	2,384,573
Designated - board reserves	<u>1,802,795</u>	<u>1,591,046</u>
Total without donor restrictions	<u>6,846,925</u>	<u>6,619,305</u>
With donor restrictions		
Purpose restricted	1,612,988	1,510,523
Endowment funds accumulated gains	1,165,604	1,093,221
Endowment funds restricted in perpetuity	<u>1,055,903</u>	<u>1,055,903</u>
Total with donor restrictions	<u>3,834,495</u>	<u>3,659,647</u>
Total net assets	<u>10,681,420</u>	<u>10,278,952</u>
	<u>10,681,420</u>	<u>10,278,952</u>
Total liabilities and net assets	<u>\$ 12,943,151</u>	<u>\$ 12,222,872</u>

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See accompanying notes to these consolidated financial statements.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Consolidated Statement of Activities and Changes in Net Assets  
For Year Ended December 31, 2020**

	Without Donor Restrictions	With Donor Restrictions	Total
<b>REVENUES AND SUPPORT</b>			
Assessment revenue	\$ 3,492,799	\$ -	\$ 3,492,799
Camp revenue	170,683	-	170,683
Contributions	703,499	183,788	887,287
Investment return	453,542	495,169	948,711
Other	67,283	-	67,283
	<u>4,887,806</u>	<u>678,957</u>	<u>5,566,763</u>
Net assets released from restriction	504,109	(504,109)	-
Total revenues and support	<u>5,391,915</u>	<u>174,848</u>	<u>5,566,763</u>
<b>EXPENSES</b>			
Program			
Congregation support and development	1,466,042	-	1,466,042
Clergy support and development	890,811	-	890,811
Evangelism and outreach	1,414,983	-	1,414,983
Support of the Wider Episcopal Church	637,154	-	637,154
Total program expenses	<u>4,408,989</u>	<u>-</u>	<u>4,408,989</u>
Management general and administrative	799,771	-	799,771
Total expenses	<u>5,208,760</u>	<u>-</u>	<u>5,208,760</u>
 CHANGE IN NET ASSETS, before periodic benefit costs	 183,155	 174,848	 358,003
 Non-operating activities			
Postretirement charges other than the Service cost component of net periodic benefit cost (Note 8)	<u>44,465</u>	<u>-</u>	<u>44,465</u>
 CHANGE IN NET ASSETS	 227,620	 174,848	 402,468
 NET ASSETS, beginning of year	 <u>6,619,305</u>	 <u>3,659,647</u>	 <u>10,278,952</u>
 NET ASSETS, end of year	 <u>\$ 6,846,925</u>	 <u>\$ 3,834,495</u>	 <u>\$ 10,681,420</u>

See accompanying notes to these consolidated financial statements.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Consolidated Statement of Activities and Changes in Net Assets  
For Year Ended December 31, 2019**

	Without Donor Restrictions	With Donor Restrictions	Total
REVENUES AND SUPPORT			
Assessment revenue	\$ 3,666,711	\$ -	\$ 3,666,711
Camp revenue	740,668	-	740,668
Contributions	124,426	301,207	425,633
Investment return	579,535	616,206	1,195,741
Other	171,829	-	171,829
	<u>5,283,169</u>	<u>917,413</u>	<u>6,200,582</u>
Net assets released from restriction	<u>276,495</u>	<u>(276,495)</u>	<u>-</u>
Total revenues and support	<u>5,559,664</u>	<u>640,918</u>	<u>6,200,582</u>
EXPENSES			
Program			
Congregation support and development	2,024,477	-	2,024,477
Clergy support and development	863,064	-	863,064
Evangelism and outreach	1,515,639	-	1,515,639
Support of the Wider Episcopal Church	540,197	-	540,197
Total program expenses	<u>4,943,377</u>	<u>-</u>	<u>4,943,377</u>
Management general and administrative	<u>863,429</u>	<u>-</u>	<u>863,429</u>
Total expenses	<u>5,806,806</u>	<u>-</u>	<u>5,806,806</u>
CHANGE IN NET ASSETS, before periodic benefit costs	(247,142)	640,918	393,776
Non-operating activities			
Postretirement charges other than the Service cost component of net periodic benefit cost (Note 9)	<u>1,107</u>	<u>-</u>	<u>1,107</u>
CHANGE IN NET ASSETS	(246,035)	640,918	394,883
NET ASSETS, beginning of year	<u>6,865,340</u>	<u>3,018,729</u>	<u>9,884,069</u>
NET ASSETS, end of year	<u>\$ 6,619,305</u>	<u>\$ 3,659,647</u>	<u>\$ 10,278,952</u>

See accompanying notes to these consolidated financial statements.



**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Consolidated Statement of Functional Expenses  
For Year Ended December 31, 2020**

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	Program					
	Congregation Support and Development	Clergy Support and Development	Evangelism and Outreach	Support of the Wider Episcopal Church	Management General and Administrative	Total
Grant and Support	\$ 945,940	\$ 521,998	\$ 381,621	\$ 571,187	\$ -	\$ 2,420,746
Personnel	520,102	301,352	539,232	65,967	288,814	1,715,467
Operational	-	-	313,684	-	316,484	630,168
Utilities and Maintenance	-	-	47,579	-	68,729	116,308
Convention and travel	-	67,461	-	-	44,407	111,868
Depreciation	-	-	132,867	-	81,337	214,204
Total expenses	<u>\$ 1,466,042</u>	<u>\$ 890,811</u>	<u>\$ 1,414,983</u>	<u>\$ 637,154</u>	<u>\$ 799,771</u>	<u>\$ 5,208,760</u>

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See accompanying notes to these consolidated financial statements.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Consolidated Statement of Functional Expenses  
For Year Ended December 31, 2019**

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	Program					
	Congregation Support and Development	Clergy Support and Development	Evangelism and Outreach	Support of the Wider Episcopal Church	Management General and Administrative	Total
Grants and support	\$ 1,412,386	\$ 488,484	\$ 264,140	\$ 435,948	\$ -	\$ 2,600,958
Personnel	532,510	374,580	749,606	63,326	376,179	2,096,201
Operating expenses	-	-	218,159	-	251,653	469,812
Utilities and maintenance	-	-	150,471	-	151,536	302,007
Bad debt expense	-	-	-	-	-	-
Convention and travel	79,581	-	-	40,923	-	120,504
Depreciation	-	-	133,263	-	84,061	217,324
Total expenses	<u>\$ 2,024,477</u>	<u>\$ 863,064</u>	<u>\$ 1,515,639</u>	<u>\$ 540,197</u>	<u>\$ 863,429</u>	<u>\$ 5,806,806</u>

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See accompanying notes to these consolidated financial statements.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Consolidated Statements of Cash Flows**

	For Years Ended December 31,	
	2020	2019
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Change in net assets	\$ 402,468	394,883
Adjustments to reconcile change in net assets to net cash from operating activities		
Depreciation expense	214,204	217,324
Unrealized gain on investments	(574,392)	(911,555)
Realized gains on investments	(158,252)	(87,767)
Employee net periodic postretirement cost	24,268	65,716
Postretirement benefit payments	(44,400)	(44,400)
(Increase) decrease in		
Inventories	-	461
Assessments receivable	124,702	(57,788)
Other receivables	9,938	46,735
Other assets	11,712	(14,281)
Increase (decrease) in		
Accounts payable	(45,527)	(256,299)
Accounts payable - related party	43,389	-
Deferred revenue from programs	(10,219)	2,378
<b>NET CASH USED IN OPERATING ACTIVITIES</b>	<b>(2,109)</b>	<b>(644,593)</b>
<b>CASH FLOWS FROM INVESTMENT ACTIVITIES</b>		
Furniture and equipment purchases	(35,977)	(37,000)
Purchase of investments	(256,234)	(240,187)
Proceeds from sale of investments	426,722	436,378
<b>NET CASH PROVIDED BY INVESTMENT ACTIVITIES</b>	<b>134,511</b>	<b>159,191</b>
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>		
Proceeds from loans made, related party	5,260	7,696
Proceeds from PPP loan	350,300	-
<b>NET CASH PROVIDED BY FINANCING ACTIVITIES</b>	<b>355,560</b>	<b>7,696</b>
<b>NET CHANGE IN CASH AND CASH EQUIVALENTS</b>	<b>487,962</b>	<b>(477,706)</b>
<b>CASH AND CASH EQUIVALENTS, beginning of year</b>	<b>1,074,386</b>	<b>1,552,092</b>
<b>CASH AND CASH EQUIVALENTS, end of year</b>	<b>\$ 1,562,348</b>	<b>\$ 1,074,386</b>

See accompanying notes to these consolidated financial statements.

# **Episcopal Diocese of Dallas of the Protestant Episcopal Church Notes to Consolidated Financial Statements**

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## **Note 1 – Description of Diocese**

The Episcopal Diocese of Dallas of the Protestant Episcopal Church (the Diocese) is an unincorporated association, which complies with the Constitution and Canons of the Protestant Episcopal Church in the United States of America (ECUSA) and recognizes the authority of the General Convention of the Church. The Diocese includes a 25-county area in Northeast Texas. The Bishop of the Diocese of Dallas (the Bishop) has jurisdiction over all affiliated organizations within the Diocese, including parishes, missions, schools, and other charitable organizations and funds.

The Endowment of the Episcopate (the EOE) is a trust that was set up and segregated to own and manage investments that provide income for the compensation of the Bishop, the Bishop Coadjutor, and the Bishop Suffragan. The Constitution of the Diocese requires an endowment fund to be managed and controlled by a Board of Trustees appointed by the Bishop. After paying the necessary expenses incident to the management of the EOE, such portion of the EOE and the earnings thereof, as determined by the Board of Trustees (not to take more from the principal than seven percent of its value at the beginning of the year), are applied annually toward the compensation of the Bishop of the Diocese, and of the Bishop Coadjutor, if there be one, and of the Suffragan Bishops, if there be any, or for other expenses of the Office of the Bishop or general Diocesan purposes.

The Diocese assumed management of the All Saints Camp and Conference Center (the Camp) in 2010. Consequently, under accounting principles generally accepted in the United States of America (U.S. GAAP), the financial position, activities and changes in net assets, and cash flows of the Camp are consolidated with those of the Diocese. The Camp is considered an evangelism and outreach program.

As the Diocese, the EOE, and the Camp, collectively referred to hereafter as the Diocese, are under common control; these financial statements have been consolidated to reflect the results of all three organizations.

The Corporation of the Episcopal Diocese (the Corporation) is a separate not-for-profit entity and was formed to hold title to all the real estate occupied by the various parishes and missions within the 25-county Diocese. In most cases, the Corporation holds nominal title to the property with the individual parish being the beneficial titleholder.

## **Principles of Consolidation**

These financial statements include the accounts of the Diocese (Operating Funds and Special Funds), consolidated with the EOE, and the Camp. These consolidated financial statements are the responsibility of the Diocese's management. These accounting policies conform to U.S. GAAP and have been consistently applied in the preparation of the consolidated financial statements.

All significant inter-entity transactions have been eliminated in consolidation.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Notes to Consolidated Financial Statements**

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**Note 2 – Summary of Significant Accounting Policies**

**Description of Net Assets**

Net assets are classified based on existence or absence of donor-imposed restrictions as follows:

*Without Donor Restrictions* – Consists of resources of the Diocese that have not been restricted by a donor. The major sources of revenue are parish assessments, Camp programs and activities, and investment income. The Board designated net assets for the Operating Funds of \$938,878 are more than the total net assets for the Operating Funds of \$597,711 due to the unfunded position on postretirement benefits of \$645,828.

*With Donor Restrictions* – Defined as the portion of net assets that have a restriction on the specific use or the occurrence of a certain future event. Net assets consisting of the initial fair value of the gifts where the donor has specified the assets donated are to be retained in an endowment, providing a permanent source of revenue for charitable purposes, are classified as with donor restrictions. The accumulation of assets (above historic gift value) in donor restricted endowment funds is classified as with donor restrictions until appropriated for use based on the Diocese's spending policy. When the purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported as net assets released from restrictions.

**Estimates**

Management uses estimates and assumptions in preparing financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and reported revenues and expenses. Significant estimates used in preparing these consolidated financial statements include those assumed in recording depreciation, postretirement benefits, and the value of investments and notes receivable. It is at least reasonably possible that the significant estimates used will change within the next year.

**Functional Expense Allocations**

Expenses are allocated among program services and management and generally based on management's estimate of time spent on these functions by specific employees. The remaining costs are charged directly to the appropriate functional category.

**Major Programs**

*Congregation support & development* – Operating grants to existing congregations needing financial assistance to sustain their ministries. Financial support for ongoing efforts to plant new churches. Funding for work of the Diocesan leadership and personnel to further the vision of the Diocese.

*Clergy support & development* – Support for development of seminarians, curates, and existing clergy, including both financial and personnel resources and including theological research and development.

*Evangelism & outreach* – Funding for spreading the gospel throughout the Diocese and beyond its geographical boundaries.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Notes to Consolidated Financial Statements**

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**Note 2 – Summary of Significant Accounting Policies (continued)**

*Support of the wider Episcopal Church* – Financial support for The Episcopal Church's General Convention as well as other ministries outside the Diocese of Dallas.

**Cash and Cash Equivalents**

The Diocese classifies all unrestricted demand deposits, money market funds, and highly liquid debt investments with an initial maturity of three months or less as cash and cash equivalents. Cash and cash equivalents designated for investment are classified as investments.

**Receivables and Deferred Revenue from Programs**

Receivables from programs represent amounts due from attendees of Camp programs and activities. Deferred revenue from programs represents advance payments to the Camp for programs and activities to be conducted in 2020.

**Investments**

Investments are recorded at their estimated fair value at the date of the consolidated financial statements. Investment transactions are recorded on their trade date. Unrealized and realized gains and losses are included in the consolidated statements of activities and changes in net assets. Interest income is recognized on the accrual basis and dividends are recognized on the ex-dividend date.

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date; that is, an exit price. The exit price assumes the asset or liability is exchanged in an orderly transaction, and it is not a forced liquidation or distressed sale.

Assets and liabilities measured at fair value are classified in a hierarchy that prioritizes the inputs to valuation techniques giving the highest priority to readily available unadjusted quoted prices in active markets for identical assets (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements) when market prices are not readily available or reliable. The valuation levels are not necessarily an indication of the risk or liquidity associated with the underlying investment. The three levels of the hierarchy are described below:

**Level 1** – Inputs to the valuation methodology are unadjusted quoted prices in active markets for identical assets or liabilities that the Diocese has the ability to access. Valuation adjustments and block discounts are not applied to Level 1 instruments. Since valuations are based on quoted prices that are readily and regularly available in an active market, valuation of these products does not entail a significant degree of judgment.

**Level 2** – Inputs to the valuation methodology are based on directly or indirectly observable inputs such as quoted prices for similar assets in active markets and quoted prices in markets that are not active.

**Level 3** – Inputs to the valuation methodology are unobservable, significant to the fair value measurement, and reflect significant management judgment.

**Episcopal Diocese of Dallas  
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**Note 2 – Summary of Significant Accounting Policies (continued)**

The Diocese's consolidated statements of financial position includes the following financial instruments that are required to be measured at fair value on a recurring basis:

- Investments held at the Episcopal Foundation of Dallas (the Foundation) are reported at fair value based on the fair value of the underlying assets in the funds as reported by the Foundation. The investments utilize the net asset value of the fund as a practical expedient to estimate the fair value.

**Inventories**

Camp inventories are stated at the lower of cost or market. Cost is determined by the first-in, first-out (FIFO) method.

**Notes Receivable**

The Diocese provides low-interest rate loans to organizations within the Diocese. These loans are stated at the principal balance and are due under various terms. Interest income is recognized when earned; however, accrual of interest is discontinued when an allowance for collectability is reserved against a loan. The Diocese examines all loans on an individual basis to determine the likelihood of collection and the need to provide an allowance for any uncollectible amounts. The Diocese has discretion regarding any borrower unable to meet its payments during the year, and may elect to write-off loans to assist these borrowers or extend the loan.

**Land, Property, and Equipment**

Property and equipment are stated at cost when purchased or at fair value as of the date of the gift when donated. Major expenditures in excess of \$2,500 and those which substantially increase the useful lives of the assets are capitalized. Maintenance, repairs, and replacements, which do not improve or extend the lives of the respective assets, are charged to operations when incurred. When property and equipment is sold or otherwise disposed of, the asset and related accumulated depreciation is removed, and any gain or loss is included in operations. Donated assets are reported as unrestricted support unless the donor has restricted the asset for a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as with donor restrictions support.

Absent donor stipulations regarding how long those donated assets must be maintained, the Diocese reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Diocese reclassifies with donor restrictions net assets to without donor restrictions net assets at that time.

Depreciation is calculated using the straight-line method at rates sufficient to amortize the related costs over the estimated useful lives of the respective assets. Estimated useful lives range from 3 to 40 years.

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 2 – Summary of Significant Accounting Policies (continued)**

**Long-Lived Assets**

The Diocese assesses potential impairments to its long-lived assets (primarily property and equipment) when there is evidence that events or changes in circumstances indicate that the carrying amount of an asset may not be recovered. An impairment loss is recognized when the undiscounted cash flows expected to be generated by an asset (or group of assets) is less than its carrying amount. Any required impairment loss is measured as the amount by which the asset's carrying value exceeds its fair value and is recorded as a reduction in the carrying value of the related asset and a charge to operating results. There were no long-lived assets that were impaired at December 31, 2020 and 2019.

**Postretirement Benefits**

The Diocese estimates its postretirement benefit costs and obligations associated with its Medicare Supplement Plan using various actuarial assumptions and methodologies. Assumptions include the current discount rate, expected costs of the plan over time, and mortality rates. To assist in developing these assumptions and estimates, the Diocese uses the services of an independent actuary. Although the Diocese believes that the assumptions used are appropriate, differences between assumed and actual experience may affect the Diocese's operating results.

**Revenues and Support**

The Executive Council of the Diocese has the authority to assess the parishes and missions for support of the budget as established by the annual Diocesan Convention. The Diocese receives a substantial portion of its revenues from assessments on parishes and missions within the Diocese. Assessments receivable at the balance sheet date represent amounts due from various parishes and missions. No amounts are considered uncollectible as the Diocese fully expects to collect these amounts. Any excess assessments at year-end are retained by the Diocese for use in the succeeding year.

Contributions are comprised of revenue from gifts, grants, and bequests. Contributions are considered to be without donor restriction unless they are specifically restricted by the donor. Contributions designated for future periods or restricted by the donor for specific purposes or in perpetuity are reported as contributions with donor restrictions.

Camp revenue is considered to be without donor restriction. Revenue from Camp programs is recognized at the time participants attend the program or activity at the Camp.

**Income Taxes**

The Diocese, the EOE, and the Camp are not-for-profit organizations that are exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code.

U.S. GAAP requires management to evaluate tax positions taken by the Diocese and recognize a tax liability if the Diocese has taken an uncertain position that more likely than not would not be sustained upon examination by the U.S. federal, state, or local tax authorities.



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**Note 2 – Summary of Significant Accounting Policies (continued)**

The Diocese has analyzed their tax positions and has concluded that as of December 31, 2020 and 2019, there are no uncertain positions taken, or expected to be taken, that would require recognition of a liability or disclosure in the consolidated financial statements.

**Recent Accounting Pronouncements**

In September 2020, the Financial Accounting Standards Board (FASB) issued Accounting Standards Update (ASU) No. 2020-07, *Not-for-Profit Entities (Topic 958) – Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets*, to improve generally accepted accounting principles by increasing the transparency of contributed nonfinancial assets for not-for-profit entities through enhancement to presentation and disclosure. This update is effective for annual periods beginning after June 15, 2021, and interim periods within annual periods beginning after June 15, 2022. The Diocese is currently assessing the potential impact of this ASU on its consolidated financial statements.

**Risks and Uncertainties**

In December 2019, a novel strain of coronavirus (COVID-19) surfaced in Asia and has spread around the world, with resulting business and social disruption. The coronavirus was declared a Public Health Emergency of International Concern by the World Health Organization on January 30, 2020. The outbreak of COVID-19 continues to adversely affect global commercial activity and has contributed to significant volatility in the financial markets. The extent to which the coronavirus may impact the Foundation's investment results will depend on future developments, which are highly uncertain and cannot be predicted, including new information which may emerge concerning the severity of the coronavirus and the actions required to contain the coronavirus or treat its impact, among others. The duration and economic impact of the outbreak is uncertain but could have a material impact to Diocese's liquidity; see also Note 3. As of December 31, 2020, the impact to the Diocese has been minimal but included closures to the Camp for a period of time.

**Subsequent Events**

Subsequent events are events or transactions that occur after the consolidated statement of financial position date but before the consolidated financial statements are available to be issued. The Diocese recognizes in the consolidated financial statements the effects of all subsequent events that provide additional evidence about conditions that existed at the date of the consolidated statement of financial position, including the estimates inherent in the process of preparing the consolidated financial statements. The Diocese's consolidated financial statements do not recognize subsequent events that provide evidence about conditions that did not exist at the date of the consolidated statement of financial position but arose after the consolidated statement of financial position date and before the consolidated financial statements are available to be issued (see Note 15).

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**Note 3 – Liquidity and Availability**

Financial assets available for general expenditures, that is, without donor or other restrictions limiting the use, within one year of the date of the consolidated statement of financial position are comprised of the following:

Financial assets	
Cash and cash equivalents	\$ 1,562,348
Investments	6,951,286
Other receivables	<u>2,018</u>
Financial assets, at December 31, 2020	<u>8,515,652</u>
Less financial assets unavailable for general expenditure within one year	
Purpose restricted net assets	(1,612,988)
Endowment and accumulated earnings	(2,221,507)
Board designated reserves	(1,802,795)
Board designed endowment fund and accumulated earnings *	<u>(2,462,643)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u><u>\$ 415,719</u></u>

\* Net of next year's estimated spending not to exceed seven percent of principal at the beginning of the year (see Note 1).

The Diocese policy is to structure its financial assets to be available to cover the following in order of priority: current operations, planned future operations, unanticipated expenses, sudden shortfalls in revenues, and capital assets.

The Diocese reserves the right to transfer funds from the Board designed reserves, as needed, as approved by the Board.

In addition to financial assets available to meet general expenditures over the next 12 months, the Diocese operates with a balanced budget and anticipates assessments to cover general expenditures; see also Note 14.

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 4 – Investments**

Investments at December 31 are as follows:

	2020	2019
Episcopal Foundation of Dallas (the Foundation)	\$ 6,951,286	\$ 6,389,130
Total	<u>\$ 6,951,286</u>	<u>\$ 6,389,130</u>

Funds invested with the Foundation are part of the Foundation's diversified portfolio of cash, fixed income securities, marketable equity securities, and alternative investments. This investment is valued based upon the Diocese's pro rata interest in the Foundation's agency investment funds (approximately 19% and 19% at December 31, 2020 and 2019, respectively). This investment seeks to preserve assets through an investment return sufficient to offset inflation and enhance, where possible, assets through an investment return sufficient to achieve payout objectives and preserve the value of the corpus. The Diocese's investment may be redeemed at any time with no prior notice. The Foundation will normally remit funds by month end following a request for redemption. In the event of a total liquidation of the Diocese's investment, the Foundation may hold back a portion of the investment related to alternate investments which may be redeemed quarterly with a 90-day notice.

The Diocese's investment returns for the years ended December 31 consist of the following:

	2020	2019
Dividends and interest	\$ 256,234	\$ 240,187
Net realized gains	158,252	87,767
Net unrealized gains (losses)	574,392	911,555
Fees	(40,167)	(43,768)
Total	<u>\$ 948,711</u>	<u>\$ 1,195,741</u>

The following table presents investments carried at fair value as of December 31, 2020 and 2019 based upon the valuation hierarchy described in Note 2.

Financial Investments Owned, December 31, 2020					
Description	Total	Level 1	Level 2	Level 3	NAV Practical Expedient
The Foundation	\$ 6,951,286	\$ -	\$ -	\$ -	\$ 6,951,286
Total	<u>\$ 6,951,286</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 6,951,286</u>

Financial Investments Owned, December 31, 2019					
Description	Total	Level 1	Level 2	Level 3	NAV Practical Expedient
The Foundation	\$ 6,389,130	\$ -	\$ -	\$ -	\$ 6,389,130
Total	<u>\$ 6,389,130</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 6,389,130</u>

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 5 – Notes Receivable**

In September 2016, the Diocese loaned \$27,676 to a related party at an interest rate of 3%. The note is payable in 48 semimonthly installments of principal and interest of \$665. A final payment was made August 31, 2020. At December 31, 2020 and 2019, the total outstanding balance on the note was \$0 and \$5,620, respectively.

**Note 6 – Property and Equipment**

Property and equipment at December 31 consisted of the following:

	2020	2019
Furniture and equipment	\$ 828,353	\$ 825,616
Buildings	6,715,240	6,682,000
Total property and equipment	7,543,593	7,507,616
Less accumulated depreciation	(3,382,235)	(3,168,031)
Net property and equipment	<u>\$ 4,161,358</u>	<u>\$ 4,339,585</u>

Depreciation expense for the years ended December 31, 2020 and 2019 totaled \$214,204 and \$217,324, respectively.

**Note 7 – Note Payable, Related Party**

On November 30, 2009, the Corporation made a \$1.3 million property loan to the Camp. The principal on this note is due and payable in annual installment payments in the amount of \$100,000 commencing November 30, 2012 through November 30, 2024. Accrued and unpaid interest of 3% is payable on the last day of each calendar month beginning October 31, 2012. Interest payments to the Corporation are being waived.

Future maturities under this note payable are as follows:

For Years Ending December 31,	
2021	\$ 100,000
2022	100,000
2023	100,000
2024	100,000
2025	753,100
	<u>\$ 1,153,100</u>

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 8 – Note Payable, Paycheck Protection Program**

The Diocese and Camp received loan proceeds in the amount of \$249,900 and \$100,400, respectively, under the Paycheck Protection Program (PPP). The loans have maturity dates of May 4, 2022 and April 15, 2022, respectively, and interest rates of 1%. Principal and interest payments were deferred on both loans in 2020. The PPP, established as part of the Coronavirus Aid, Relief and Economic Security Act (CARES Act), provides for loans to qualifying businesses for amounts up to 2.5 times of the average monthly payroll expenses of the qualifying business. The loans and accrued interest are forgivable after 24 weeks as long as the borrower uses the loan proceeds for eligible purposes, including payroll, benefits, rent and utilities, and maintains its payroll levels. Under the Coronavirus Aid, Relief, and Economic Security (CARES) Act, Section 1102, Paycheck Protection Program the Small Business Administration (SBA) has five years to audit any applicant. The Diocese, at the time of submitting its application, evaluated the economic uncertainty resulting from the COVID-19 pandemic and the potential impact of that uncertainty on the ongoing operations of the business. Based on the risk of the Diocese having to limit or close its operations and unavailability of other sources of liquidity it was determined that the loan request was necessary.

**Note 9 – Employee Retirement Benefits**

The Diocese of Dallas contributes to a retirement plan for clergy employed by the Diocesan office, which is maintained and administered by the Church Pension Group of the Episcopal Church (CPG). The Diocese makes annual contributions to the fund equal to 18% of compensation. Total contributions for the years ended December 31, 2020 and 2019 were approximately \$71,538 and \$82,000, respectively.

The Diocese contributes to another retirement plan for lay employees. This plan is maintained and administered by the CPG. The Diocese makes annual contributions to the fund equal to 10% of employee compensation. Total contributions for the years ended December 31, 2020 and 2019 were approximately \$50,885 and \$49,000, respectively.

The Diocese contributes to another retirement plan for employees of the Camp. This plan is maintained and administered by the CPG. The Camp makes annual contributions to the fund up to 10% of Camp employee compensation. The Diocese contributes 9% of the Camp's Executive Director's compensation and housing to another retirement plan administered by CPG. Total contributions for the years ended December 31, 2020 and 2019 were approximately \$21,000 and \$30,000, respectively.

The Diocese also has a postretirement noncontributory Medicare Supplement Plan that covers laity employees who meet certain eligibility requirements. The Diocese paid approximately \$44,400 and \$44,400 for retiree Medicare Supplement premiums for the years ended December 31, 2020 and 2019, respectively.

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 9 – Employee Retirement Benefits (continued)**

**Obligations and Funded Status**

A summary of fair value of plan assets, benefit obligations, and funded status of the postretirement noncontributory Medicare Supplement Plan as of December 31:

	2020	2019
Change in benefit obligation		
Postretirement benefit obligation, at beginning of year	\$ 665,960	\$ 644,644
Service cost	4,757	4,210
Interest cost	19,511	25,581
Actuarial loss (gain)	-	35,925
Benefits paid	(44,400)	(44,400)
Postretirement benefit obligation, at end of year	<u>\$ 645,828</u>	<u>\$ 665,960</u>
Change in plan assets		
Fair value of plan assets at beginning of year	\$ -	\$ -
Employer contributions	44,400	44,400
Benefits paid	(44,400)	(44,400)
Fair value of plan assets, at end of year	-	-
Funded status, at end of year (underfunded)	<u>\$ (645,828)</u>	<u>\$ (665,960)</u>
Items not yet recognized in net periodic benefit cost		
	2020	2019
Unrecognized prior service cost	\$ 290,597	\$ 291,704
Net gain	(44,465)	(1,107)
	<u>\$ 246,132</u>	<u>\$ 290,597</u>
Net periodic postretirement benefit cost, recognized in the Statements of Activities		
	2020	2019
Service cost	\$ 4,757	\$ 4,210
Other components of net periodic benefit cost	-	62,613
Net periodic postretirement benefit cost	<u>\$ 4,757</u>	<u>\$ 66,823</u>
Items not yet recognized in net periodic benefit cost, at beginning of year	\$ 290,597	\$ 291,704
Net loss (gain)	-	27,333
Prior service cost amortization	(44,465)	(28,440)
Items not yet recognized in net periodic benefit cost, at end of year	<u>\$ 246,132</u>	<u>\$ 290,597</u>

The estimated prior service credit for the postretirement noncontributory Medicare Supplement previously recognized as a change in unrestricted net assets but not included in net periodic benefit cost that will be amortized into net periodic benefit cost over the next year is \$44,465.

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 9 – Employee Retirement Benefits (continued)**

**Assumptions**

The following weighted-average assumptions were used to determine discount rates at December 31, 2020 and 2019:

	<u>2020</u>	<u>2019</u>
Net periodic benefit cost discount rate	4.09%	4.09%
Benefit obligations	3.01%	3.01%

Assumed health care cost trend rates have a significant effect on the amounts reported for the Medicare Supplement. For measurement purposes, a 5.7% rate of increase per year was assumed. A one percentage point change in assumed health care cost trend rates would have the following effects:

	<u>2020</u>	<u>2019</u>
1% Increase		
Effect on total of service and interest cost	\$ 4,710	\$ 4,710
Effect on postretirement benefit obligation	\$ 87,600	\$ 87,600
1% Decrease		
Effect on total of service and interest cost	\$ (3,351)	\$ (3,351)
Effect on postretirement benefit obligation	\$ (60,671)	\$ (60,671)

The following minimum benefit payments are expected to be paid for the years ending December 31:

2021	\$ 36,313
2022	36,478
2023	36,461
2024	36,242
Years 2025 – 2029	<u>186,081</u>
	<u><u>\$ 331,575</u></u>

The estimated net contribution for the years ended December 31, 2020 and 2019 is \$35,987 and \$35,987, respectively.

**Episcopal Diocese of Dallas  
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Notes to Consolidated Financial Statements**

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**Note 10 – Net assets with Donor Restrictions**

Net assets with donor restrictions are available for the following at December 31:

	2020		
	Purpose Restricted	Endowment	Total
Educational purposes	\$ 968,298	\$ 573,508	\$ 1,541,806
Alcoholic rehabilitation	142,060	-	142,060
Scholarships	298,594	733,870	1,032,464
Missions	7,194	658,231	665,425
Children's services	300	255,898	256,198
Camp services	58,100	-	58,100
Other	138,442	-	138,442
Net assets with donor restrictions, available	<u>\$ 1,612,988</u>	<u>\$ 2,221,507</u>	<u>\$ 3,834,495</u>

	2019		
	Purpose Restricted	Endowment	Total
Educational purposes	\$ 863,568	\$ 532,809	\$ 1,396,377
Alcoholic rehabilitation	123,366	-	123,366
Scholarships	324,266	724,187	1,048,453
Missions	24,694	669,889	694,583
Children's services	296	222,239	222,535
Camp services	48,968	-	48,968
Other	125,365	-	125,365
Net assets with donor restrictions, available	<u>\$ 1,510,523</u>	<u>\$ 2,149,124</u>	<u>\$ 3,659,647</u>

**Note 11 – Endowment Funds**

The Diocese's endowment funds consist of approximately six funds, including the EOE, established for a variety of purposes. The endowment funds include both donor-restricted endowment funds and funds designated by the Executive Council to function as endowment. As required by U.S. GAAP, net assets associated with endowment funds, including funds designated by the Executive Council to function as endowments, are classified and reported based on the existence or absence of donor-imposed restrictions.



**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Notes to Consolidated Financial Statements**

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**Note 11 – Endowment Funds (continued)**

The Diocese has interpreted Texas State Law as requiring it to periodically evaluate the amounts to be preserved as permanently restricted funds for those donor restricted endowment funds subject to Uniform Prudent Management of Institutional Funds Act (UPMIFA). In making such evaluation, the Diocese considers such factors as (a) the duration and permanence of the fund, giving priority to the donor's intent that the fund be maintained permanently; (b) the purposes of the Diocese and the fund; (c) general economic conditions; (d) the possible effects of inflation and deflation; (e) the expected total return from income and the appreciation of investments; (f) other resources of the Diocese; and (g) the investment policy of the Diocese.

**Investment Objectives and Spending Policy**

The Diocese's investment objective is to earn inflation-offsetting returns that preserve the real value of the assets and, where possible, earn enhanced returns to achieve the spending objectives of the programs supported by the endowments. Endowment assets include donor-restricted funds that the Diocese must hold in perpetuity as well as board-designated funds. The endowment assets are invested in a diversified investment portfolio designed to achieve a balance of income and growth objectives within prudent risk constraints.

After maintaining the real value of the permanent endowment funds, any remainder of total return is available for appropriation. State law allows the Diocese to appropriate so much of net appreciation as is prudent considering the Diocese's long-term and short-term needs, present and anticipated financial requirements, and expected total return on its investments, price level trends, and general economic conditions.

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church  
Notes to Consolidated Financial Statements**

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**Note 11 – Endowment Funds (continued)**

Changes in the endowment fund composition for the fiscal years ended December 31, 2020 and 2019:

	2020		
	Without Donor Restriction	With Donor Restriction	Total
Endowment fund, beginning of year	\$ 2,384,573	\$ 2,149,124	\$ 4,533,697
Investment return			
Investment income	96,461	84,645	181,106
Net realized and unrealized gains	276,805	241,055	517,860
Total investment return	373,266	325,700	698,966
Appropriation of endowment assets for expenditures	(109,836)	(253,317)	(363,153)
Endowment fund, end of year	<u>\$ 2,648,003</u>	<u>\$ 2,221,507</u>	<u>\$ 4,869,510</u>
	2019		
	Without Donor Restriction	With Donor Restriction	Total
Endowment fund, beginning of year	\$ 2,040,229	\$ 1,787,963	\$ 3,828,192
Investment return			
Investment income	89,036	79,834	168,870
Net realized and unrealized losses	369,867	324,124	693,991
Total investment return	458,903	403,958	862,861
Appropriation of endowment assets for expenditures	(114,559)	(42,797)	(157,356)
Endowment fund, end of year	<u>\$ 2,384,573</u>	<u>\$ 2,149,124</u>	<u>\$ 4,533,697</u>

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level the donor or UPMIFA requires the Diocese to retain as a fund of perpetual duration. As of December 31, 2020 and 2019, there were no deficiencies.

**Note 12 – Concentrations of Risk**

Two parishes comprise approximately 40% and 39% of total assessments received by the Diocese for the years ended December 31, 2020 and 2019, respectively. The Diocese had cash deposits with financial institutions that exceeded the Federal Deposit Insurance Corporation insured limit at various times during the years ended December 31, 2020 and 2019.

**Episcopal Diocese of Dallas  
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**Note 13 – Related Party Activity**

The Diocese offices in a building owned by the Corporation. The Corporation does not charge the Diocese for the use of these facilities.

**Note 14 – Commitments and Contingencies**

The Diocese guarantees a loan provided to a church for the cost of construction of certain property improvements. The total committed and outstanding loan balance was \$2,861,576 as of December 31, 2020 and 2019. The Diocese has no liability recorded in relation to the loan guarantee as of December 31, 2020 and 2019 as the loan has not been called.

The Diocese is party to various claims and complaints arising in the normal course of operations. In the opinion of management, all such matters are without merit, and an unfavorable disposition would not have a material effect on the financial position of the Diocese. Furthermore, the Diocese anticipates no losses due to environmental issues or hazardous employee working conditions.

**Note 15 – Subsequent Events**

In preparing the accompanying consolidated financial statements, the Diocese has reviewed events that have occurred after December 31, 2020 through October 4, 2021, the date the consolidated financial statements were available to be issued. On March 17, 2021 and July 16, 2021, the entire PPP loan balances for Diocese and Camp were forgiven, respectively.

## **Supplementary Information**

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**Episcopal Diocese of Dallas  
of The Protestant Episcopal Church  
Consolidating Schedule of Financial Position by Fund Type and Equity  
December 31, 2020**

	Diocese Funds					
	Operating Funds	Special Funds	EOE	All Saints Camp	Eliminations	Total
<b>ASSETS</b>						
Cash and cash equivalents	\$ 1,132,776	\$ 380,818	\$ 18,088	\$ 30,666	\$ -	\$ 1,562,348
Investments	-	4,321,371	2,629,915	-	-	6,951,286
Inventories	-	-	-	6,529	-	6,529
Assessments receivable	-	-	-	-	-	-
Other receivables	-	-	-	2,018	-	2,018
Accounts receivable, inter-entity	-	-	-	-	-	-
Note receivable, related party	-	-	-	-	-	-
Property and equipment, net	104,468	-	-	4,056,890	-	4,161,358
Land held for future parish development	252,764	-	-	-	-	252,764
Other assets	6,848	-	-	-	-	6,848
Total assets	<u>\$ 1,496,856</u>	<u>\$ 4,702,189</u>	<u>\$ 2,648,003</u>	<u>\$ 4,096,103</u>	<u>\$ -</u>	<u>\$ 12,943,151</u>
<b>LIABILITIES AND NET ASSETS</b>						
<b>LIABILITIES</b>						
Accounts payable	\$ 3,417	\$ -	\$ -	\$ 1	\$ -	\$ 3,416
Accounts payable, inter-entity	-	-	-	-	-	-
Account payable, related party	-	43,389	-	-	-	43,389
Deferred income from programs	-	-	-	65,698	-	65,698
Postretirement benefit obligation	645,828	-	-	-	-	645,828
Note payable, related party	-	-	-	1,153,100	-	1,153,100
Note payable, paycheck protection program	249,900	-	-	100,400	-	350,300
Total liabilities	<u>899,145</u>	<u>43,389</u>	<u>-</u>	<u>1,319,197</u>	<u>-</u>	<u>2,261,731</u>
<b>NET ASSETS</b>						
Without donor restrictions						
Undesignated	(341,167)	6,537	-	2,730,757	-	2,396,127
Board designed endowment fund,						
Endowment of the Episcopate	-	-	2,648,003	-	-	2,648,003
Designated - board reserves	938,878	824,049	-	39,868	-	1,802,795
Total without donor restrictions	<u>597,711</u>	<u>830,586</u>	<u>2,648,003</u>	<u>2,770,625</u>	<u>-</u>	<u>6,846,925</u>
With donor restrictions						
Purpose restricted	-	1,606,707	-	6,281	-	1,612,988
Endowment funds accumulated gains	-	1,165,604	-	-	-	1,165,604
Endowment funds restricted in perpetuity	-	1,055,903	-	-	-	1,055,903
Total with donor restrictions	<u>-</u>	<u>3,828,214</u>	<u>-</u>	<u>6,281</u>	<u>-</u>	<u>3,834,495</u>
Total net assets	<u>597,711</u>	<u>4,658,800</u>	<u>2,648,003</u>	<u>2,776,906</u>	<u>-</u>	<u>10,681,420</u>
Total liabilities and net assets	<u>\$ 1,496,856</u>	<u>\$ 4,702,189</u>	<u>\$ 2,648,003</u>	<u>\$ 4,096,103</u>	<u>\$ -</u>	<u>\$ 12,943,151</u>

**Episcopal Diocese of Dallas  
of The Protestant Episcopal Church  
Consolidating Schedule of Financial Position by Fund Type and Equity  
December 31, 2019**

	Diocese Funds					
	Operating Funds	Special Funds	EOE	All Saints Camp	Eliminations	Total
<b>ASSETS</b>						
Cash and cash equivalents	\$ 580,909	\$ 406,487	\$ 18,078	\$ 68,912	\$ -	\$ 1,074,386
Investments	-	4,022,635	2,366,495	-	-	6,389,130
Inventories	-	-	-	6,529	-	6,529
Assessments receivable	124,702	-	-	-	-	124,702
Other receivables	-	-	-	11,956	-	11,956
Accounts receivable, inter-entity	-	-	-	-	-	-
Note receivable, related party	-	5,260	-	-	-	5,260
Property and equipment, net	119,371	-	-	4,220,214	-	4,339,585
Land held for future parish development	252,764	-	-	-	-	252,764
Other assets	18,560	-	-	-	-	18,560
Total assets	<u>\$ 1,096,306</u>	<u>\$ 4,434,382</u>	<u>\$ 2,384,573</u>	<u>\$ 4,307,611</u>	<u>\$ -</u>	<u>\$ 12,222,872</u>
<b>LIABILITIES AND NET ASSETS</b>						
<b>LIABILITIES</b>						
Accounts payable	\$ 7,943	\$ -	\$ -	\$ 41,000	\$ -	\$ 48,943
Accounts payable, inter-entity	-	-	-	-	-	-
Deferred income from programs	-	-	-	75,917	-	75,917
Postretirement benefit obligation	665,960	-	-	-	-	665,960
Note payable	-	-	-	-	-	-
Note payable, related party	-	-	-	1,153,100	-	1,153,100
Total liabilities	<u>673,903</u>	<u>-</u>	<u>-</u>	<u>1,270,017</u>	<u>-</u>	<u>1,943,920</u>
<b>NET ASSETS</b>						
Without donor restrictions						
Undesignated	(361,475)	6,537	-	2,998,624	-	2,643,686
Board designed endowment fund, Endowment of the Episcopate	-	-	2,384,573	-	-	2,384,573
Designated - board reserve	783,878	772,163	-	35,005	-	1,591,046
Total without donor restrictions	<u>422,403</u>	<u>778,700</u>	<u>2,384,573</u>	<u>3,033,629</u>	<u>-</u>	<u>6,619,305</u>
With donor restrictions						
Purpose restricted	-	1,506,558	-	3,965	-	1,510,523
Endowment funds accumulated gains	-	1,093,221	-	-	-	1,093,221
Endowment funds restricted in perpetuity	-	1,055,903	-	-	-	1,055,903
Total with donor restrictions	<u>-</u>	<u>3,655,682</u>	<u>-</u>	<u>3,965</u>	<u>-</u>	<u>3,659,647</u>
Total net assets	<u>422,403</u>	<u>4,434,382</u>	<u>2,384,573</u>	<u>3,037,594</u>	<u>-</u>	<u>10,278,952</u>
Total liabilities and net assets	<u>\$ 1,096,306</u>	<u>\$ 4,434,382</u>	<u>\$ 2,384,573</u>	<u>\$ 4,307,611</u>	<u>\$ -</u>	<u>\$ 12,222,872</u>

**Episcopal Diocese of Dallas  
of The Protestant Episcopal Church  
Consolidating Schedule of Financial Position by Fund Type and Equity  
December 31, 2020**

	Diocese Funds			All Saints Camp	Eliminations	Total
	Operating Funds	Special Funds	EOE			
REVENUES AND SUPPORT						
Assessment revenue	\$ 3,492,799	\$ -	\$ -	\$ -	\$ -	\$ 3,492,799
Camp revenue	-	-	-	170,683	-	170,683
Contributions	220,000	263,967	-	661,590	(258,270)	887,287
Investment return	765	589,516	358,430	-	-	948,711
Endowment of the Episcopate grant	95,000	-	-	-	(95,000)	-
Other	62,405	-	-	4,878	-	67,283
Total revenues and support	<u>3,870,969</u>	<u>853,483</u>	<u>358,430</u>	<u>837,151</u>	<u>(353,270)</u>	<u>5,566,763</u>
EXPENSES						
Grants and support	2,027,650	629,066	95,000	-	(353,270)	2,398,446
Personnel	1,428,541	-	-	356,644	-	1,785,185
Operating expenses	133,329	-	-	470,526	-	603,855
Utilities and maintenance	70,984	-	-	71,369	-	142,353
Convention and travel	64,717	-	-	-	-	64,717
Depreciation	14,904	-	-	199,300	-	214,204
Total expenses	<u>3,740,125</u>	<u>629,066</u>	<u>95,000</u>	<u>1,097,839</u>	<u>(353,270)</u>	<u>5,208,760</u>
CHANGE IN NET ASSETS, before periodic benefit costs	130,844	224,417	263,430	(260,688)	-	358,003
Non-operating activities						
Postretirement charges other than the Service cost component of net periodic benefit cost (Note 9)	44,465	-	-	-	-	44,465
CHANGE IN NET ASSETS	175,309	224,417	263,430	(260,688)	-	402,468
NET ASSETS, beginning of year	422,403	4,434,382	2,384,573	3,037,594	-	10,278,952
NET ASSETS, end of year	<u>\$ 597,712</u>	<u>\$ 4,658,799</u>	<u>\$ 2,648,003</u>	<u>\$ 2,776,906</u>	<u>\$ -</u>	<u>\$ 10,681,420</u>

**Episcopal Diocese of Dallas  
of The Protestant Episcopal Church  
Consolidating Schedule of Activities by Fund Type and Entity  
For Year Ended December 31, 2019**

	Diocese Funds					
	Operating Funds	Special Funds	EOE	All Saints Camp	Eliminations	Total
REVENUES AND SUPPORT						
Assessment revenue	\$ 3,666,711	\$ -	\$ -	\$ -	\$ -	\$ 3,666,711
Camp revenue	-	-	-	740,668	-	740,668
Contributions	234,000	307,184	-	297,529	(413,080)	425,633
Investment return	(405)	751,802	444,344	-	-	1,195,741
Endowment of the Episcopate grant	100,000	-	-	-	(100,000)	-
Other	62,394	-	-	129,435	(20,000)	171,829
Total revenues and support	<u>4,062,700</u>	<u>1,058,986</u>	<u>444,344</u>	<u>1,167,632</u>	<u>(533,080)</u>	<u>6,200,582</u>
EXPENSES						
Grants and support	2,514,672	519,366	100,000	-	(533,080)	2,600,958
Personnel	1,439,522	-	-	656,679	-	2,096,201
Operating expenses	142,573	-	-	327,239	-	469,812
Utilities and maintenance	76,300	-	-	225,707	-	302,007
Bad debt expense	-	-	-	-	-	-
Convention and travel	120,504	-	-	-	-	120,504
Depreciation	17,430	-	-	199,894	-	217,324
Total expenses	<u>4,311,001</u>	<u>519,366</u>	<u>100,000</u>	<u>1,409,519</u>	<u>(533,080)</u>	<u>5,806,806</u>
CHANGE IN NET ASSETS, before periodic benefit costs	(248,301)	539,620	344,344	(241,887)	-	393,776
Non-operating activities						
Postretirement charges other than the Service cost component of net periodic benefit cost (Note 9)	<u>1,107</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>1,107</u>
CHANGE IN NET ASSETS	(247,194)	539,620	344,344	(241,887)	-	394,883
NET ASSETS, beginning of year	<u>669,597</u>	<u>3,894,762</u>	<u>2,040,229</u>	<u>3,279,481</u>	<u>-</u>	<u>9,884,069</u>
NET ASSETS, end of year	<u>\$ 422,403</u>	<u>\$ 4,434,382</u>	<u>\$ 2,384,573</u>	<u>\$ 3,037,594</u>	<u>\$ -</u>	<u>\$ 10,278,952</u>